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Conservation Study Institute

Working Together for a Common Future

The Community–Public Land Regional Workshop Handbook

Conservation and Stewardship Publication No. 12

by Jacquelyn L. Tuxill

Prepared by the Conservation Study Institute

in cooperation with
The Conservation Fund
and QLF/Atlantic Center for the Environment

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This report is the twelfth in the Conservation and Stewardship Publication Series produced by the Conservation Study Institute. This series includes a variety of publications designed to provide information on conservation history and current practice for professionals and the public. The series editor is Nora J. Mitchell, director of the Institute and assistant regional director for conservation studies, National Park Service. This volume was prepared in cooperation with The Conservation Fund and QLF/Atlantic Center for the Environment.

The Conservation Study Institute was established by the National Park Service in 1998 to enhance leadership in the field of conservation. A partnership with academic, government, and nonprofit organizations, the Institute helps the National Park Service and its partners to stay in touch with the evolving field of conservation and to develop more sophisticated partnerships, new tools for community engagement, and new strategies for the twenty-first century. The Institute is based at Marsh-Billings-Rockefeller National Historical Park within the Northeast Region of the National Park Service.

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Working Together for a Common Future: The Regional Community–Public Land Workshop

To successfully advance conservation and a sustainable future for communities, public lands, and their shared regional landscape requires the application of more effective collaborative strategies. In recent years the National Park Service (NPS) and other federal public land management agencies have been encouraging managers to engage communities that neighbor national parks and other nationally designated areas in order to collaboratively create opportunities and address common challenges. Similarly, communities neighboring public lands are recognizing the importance of building stronger and more effective partnerships with public land managers. To respond to the opportunity created by this heightened awareness, there is a need for both public land managers and community leaders to build engagement skills and capacity so that they can develop effective working relationships based on a mutual recognition of their common future. Communities and adjacent public lands share resources that cross boundaries. They also share concerns, opportunities, and challenges. Some regions are experiencing increasing visitor use and residential growth, which can bring associated traffic problems, changing economic opportunities, and development that intrudes on scenic views and affects community character and landscape integrity. At some national parks, such growth and development is affecting landscapes that are both historically and ecologically significant. Parks as well as neighboring communities may experience conditions that diminish the very experience sought by visitors and residents alike. Other communities, often in rural areas, are at the other end of the development spectrum and seek to capitalize on unrealized economic and community development opportunities that exist due to their “gateway” setting in relation to public lands. In all of these cases, the future of our public lands, neighboring communities, and the landscape and resources that they share is closely intertwined.

Since 1998, a consortium of organizations has been working to build the capacity of communities and public land managers to collaboratively identify and address shared resource-related issues through place-based partnerships. With a range of venues and services, this consortium of partners has offered public land managers and communities a process of civic engagement that leads to dialogue and a cooperative approach to conserving resources, sustaining community character, and increasing the economic vitality of the region. From its inception in 1998 through 2006, the program has worked with some 1,800 land managers and community leaders, and engaged approximately 100 community teams in courses and workshops.

Currently, the primary partners in this initiative are The Conservation Fund, National Park Service Conservation Study Institute, and U.S. Fish and Wildlife Service. These partners cooperate with an expanding list of other organizations, including the Urban Lands Institute; NPS Rivers, Trails, and Conservation Assistance Program; NPS National Heritage Areas Program; NPS Training and Development Program; Sonoran Institute; The Wilderness Society; and Watchable Wildlife, Inc. Collectively, the consortium offers a wide variety of opportunities for communities and public land managers to engage in the process of collaborative conservation, including:

- "Balancing Nature and Commerce in Communities That Neighbor Public Lands,"[1] a four-day national course offered annually at the National Conservation Training Center in Shepherdstown, West Virginia
- half-day interactive web-based and television workshops
- multi-day regional workshops
- shorter community forums
- technical assistance

Each of these approaches touches on issues, tools, and resources relevant to collaborative conservation, although the depth of discussion and learning varies according to the length of the event. These diverse opportunities allow a community to engage in the process based on its situation and experience. Each activity enhances the capacity of communities and public land managers to successfully carry out a collaborative community engagement initiative. Consortium partners also make available additional resources that are useful to communities and public land managers, including case study videos, a guide to federal programs that provide various assistance to gateway communities, and other publications.

Recognizing the importance of shaping collaborative strategies for addressing common issues and building relationships, the consortium uses a facilitated, team-based approach. Participants attend the national course and regional workshops in teams composed of representatives from local municipalities, federal land management agencies, and the private sector. The teams work together to craft strategies they can use to engage people in their communities, learning from the instructors as well as from the other teams. These programs are highly interactive, use case studies as real-life examples, and offer many opportunities for discussion. Participating teams learn about tools that help address such common concerns as unplanned growth, habitat degradation and fragmentation, loss of community character, and economic sustainability. These tools can include community mapping exercises, skill-building and action-planning activities, and techniques that facilitate collaboration and partnership building.

[1] Previously titled "Balancing Nature and Commerce in Gateway Communities"

Regional Community–Public Land Workshop

This handbook has been developed by the Conservation Study Institute specifically to guide citizens and agency leaders who want to organize a regional community–public land workshop. The workshop can be focused on a specific public land parcel (e.g., national park, historic site, national forest or other public land, or state park), a community or county, a river corridor or scenic byway, or a geographic region (e.g., national heritage area). Workshops have typically accommodated six to eight teams. Although teams are most often organized along community lines, they might also be organized more regionally or be theme based.

We encourage you to define your region in a way that encompasses other nearby communities that may also be grappling with similar issues. Thinking more expansively can result in a workshop with the greater benefits and synergy that come from exchanging ideas among a larger group. The workshop will help you and people in neighboring communities to think strategically about the region and create local action plans that connect at the broader landscape level.

The workshop is developed collaboratively by a local steering team made up of people from the region's public agencies, nonprofit organizations, and private sector. Working closely with the steering team is a liaison from one of the consortium partners, most likely from Conservation Study Institute or The Conservation Fund. Major tasks include organizing workshop content and logistics, developing marketing strategies, selecting participant teams, and raising the necessary funds to carry out the event. The steering team draws from the workshop content developed for the national course or other regional workshops to develop its own local curriculum.

The following are the main modules, or sessions, that frame the workshop:

- Introduction to Gateway Communities
- Regional Overview (tailored for each workshop)
- Building Long-Term Partnerships
- Protecting Community Character
- Sustainable Tourism
- Building and Facilitating Civic Engagement
- Mapping Your Community (team exercise)
- Developing an Action Plan (team exercise)

Additional modules available include:

- Understanding Your Local Economy
- Measuring the Impacts of Growth and Development
- Community Visioning
- Transportation
- Land Conservation Tools and Strategies
- Strategic Planning for Land Conservation
- Protecting Cultural Heritage

- Branding and Marketing of Tourism Resources
- Engaging the Community
- Place-based Education
- Video case studies of Sanibel Island, Florida, and Zion National Park, Utah

The number of modules selected determines the workshop length, which is typically 2½ to 3½ days. Subjects that do not currently exist within the modules can be developed and the modules can be tailored for the region.

The steering team begins workshop planning 8 to 12 months prior to the date of delivery. Factors that affect organizing time include the geographic scope and size of the region, the complexity of the issues to be addressed, the amount of tailoring that is needed, whether new modules are desired, community readiness factors, the organizing model used, the budget, fundraising needs, and the capacity of the steering team.

Workshop participants attend in teams of 5 to 7 people, with multiple community sectors represented, e.g., public land managers, nonprofit organizations, local leaders or champions, town officials, and members of the business sector. Along with case studies, discussion, and team exercises, the workshop offers a "toolkit" of resources that community and public land partners can use to help address their concerns. As the workshop progresses, each team builds an action plan, concluding by developing specific next steps to move the plan forward. Also, through the networking that occurs at the workshop, the teams develop valuable relationships with agencies, organizations, and other communities on a statewide or regional scale. The overall result is a workshop that provides participants with the knowledge, skills, resources, and connections for developing and supporting collaborative action in their communities and region-wide.

For More Information

For more information, please contact one of the primary partners in this consortium:

Conservation Study Institute: Delia Clark, stewardship@nps.gov; www.nps.gov/csi

The Conservation Fund: Kris Hoellen, www.conservationfund.org
Conservation Leadership Network: www.conservationfund.org/training_education/about_clm

U.S. Fish and Wildlife Service: Laura Jones, laura_jones@fws.gov
National Conservation Training Center: http://training.fws.gov

Chapter 2

About this Handbook

The Conservation Study Institute has developed this handbook to assist local partners in organizing a regional community–public land workshop. The organizing process and tips that follow draw on the lessons learned in organizing many such workshops in a wide range of settings. The handbook is designed for use by a local steering team, working with a consortium partner liaison from either the Conservation Study Institute or The Conservation Fund. It is arranged by organizing components, which allows you to divide your steering team into logical work committees. The format makes it easy to copy certain sections and distribute them to other people who are helping with the organizing. Each section includes a checklist of key steps in that work component.

Because each workshop is tailored to regional needs, the organizing needs can vary. Do not feel tied to all of the strategies in this handbook, as not every suggestion will fit your situation. Similarly, the handbook contains many details so that people who have not planned a workshop before can deliver a successful meeting. You may find the handbook more detailed than is necessary for you. Even if you do not need guidance on logistical details, please review the sections that relate to partnership building, as these sections are based on past experience in building successful team partnerships.

By drawing on what has worked well in past workshops, we have developed complementary responsibilities for the local steering team and the consortium partner liaison who is working with you. These responsibilities are designed to distribute the workload and allow local partners to take the lead in many of the workshop tasks. This facilitates local ownership of the workshop, and helps set the stage for successful follow-up action.

The handbook begins with an orientation to the workshop approach and partnership philosophy, and a section that helps you conduct a self-assessment to help determine where your community falls on a "readiness" spectrum. Experience has shown that communities are able to take best advantage of the workshop when they have some history of working together across sectors and have developed some common understanding about shared resources and concerns. Based on your analysis of your community's readiness (see chapter 4), you may prefer to begin with either a half-day, interactive distance learning workshop or a one-day community forum. Either of these can set the stage nicely for the longer, more in-depth regional workshop, as can participation in the national training course. The chapter on community readiness explains these alternatives.

Following the self-assessment section are two chapters that guide you through necessary first steps that have to happen before getting started on workshop organizing. This includes an initial conversation with a consortium partner (see chapter 5). Then, with chapter 7, the "nuts-and-bolts" sections begin, guiding you through the organizing steps. The last two chapters discuss follow-up activities, both immediate and longer term. In the appendices you will find examples of documents that have been produced for other workshops, including a master timeline that shows when different tasks fit into the overall work schedule, workshop agendas, workshop announcements, and an evaluation form. The final appendix contains a list of resources.

The consortium partners are committed to helping you deliver an effective workshop. If you have questions at any time, please contact the consortium partner with whom you are working. We welcome feedback on this handbook and any comments you may have for improvements (stewardship@nps.gov). Good luck!

Chapter 3

Workshop Approach and Partnership Philosophy

The following discussion reviews both the approach and the partnership philosophy underlying the regional community–public land workshop. It also explores the relationship between the consortium liaison and local partners.

THE WORKSHOP APPROACH

The workshop draws on the proven approach of the national "Balancing Nature and Commerce in Communities That Neighbor Public Lands" course.[1] Adults learn best when they can discuss what they are learning and apply it to their own experiences. The workshop is designed to be interactive and emphasizes participatory learning, group discussion, and team-building activities. Group size is kept relatively small to optimize interaction. There are no concurrent sessions, so everyone receives the same workshop content. Each module is carefully designed with learning objectives to help achieve the overall goal of building capacity in "gateway" communities, and instructors help shape their presentations to meet the stated objectives. Most modules include case studies to ground the instructional material in reality. Often instructors are on hand for several days and are available to answer questions and provide other guidance. The course offers tools for collaboration and partnership building and opportunities to practice these skills. With all this information and preparation, participants gain confidence in their ability to apply their new skills back in their communities.

As you begin planning for your workshop, it may be important to clarify how the workshop approach described above varies from the more conventional conference approach. In a typical conference, presenters are invited to provide their perspectives on and experiences with some aspect of the conference content. Individual speakers usually follow their personal comfort level and specific expertise and do not necessarily relate their content to the overarching goals of the meeting organizers. Most conferences have a mixture of panels and plenary sessions, with participants choosing from among the content offerings. Opportunities for group interaction and discussion may be limited, and most conferences aim for larger participant numbers.

We have highlighted these differences in order to make clear the skill-building approach used in the community–public land workshops. As different techniques may be better suited for different audiences, it is important to discuss this approach within your steering team at the very beginning of your organizing activities. This will avoid confusion and save considerable time as you put together your workshop agenda.

[1] Previously titled "Balancing Nature and Commerce in Gateway Communities

THE PARTNERSHIP PHILOSOPHY

Partnerships are the foundation of successful community–public land initiatives. The "gateway" setting, in which one or more communities are located adjacent to a national park or other public land, entails shared resources, interconnected problems and opportunities, and an interdependent future. Regardless of where a community falls on the spectrum of growth in such a setting, everyone who has a stake in the situation benefits from building a true partnership, with a shared vision and goals and an agreed-upon plan for working together over the long term to achieve the vision. Moreover, this is not a one-time collaboration but an ongoing relationship. It requires hard work and open communication to build the trust and mutual support that characterize any effective partnership. Although this work takes time, it brings rewards in the partnering relationship that go far beyond the initial reasons for entering into collaboration. For this reason, the "art" of partnering is threaded throughout the workshop process, beginning with formation of the steering team and continuing through the workshop organizing and team selection to the workshop itself.

THE RELATIONSHIP BETWEEN THE CONSORTIUM PARTNER AND THE LOCAL STEERING TEAM

To deliver a regional community–public land workshop, a liaison from the consortium partner works collaboratively with a local steering team. (See pages 5.1 and 1.4 for information on engaging a consortium partner.) Both the consortium liaison and the local partners bring important strengths to the project. The local partners are key to effectively combining local knowledge and experience with the tested workshop process. They help to ensure that the workshop content becomes more regionally specific and is relevant to regional concerns. The local partners usually take the lead in fundraising, marketing, recruiting participating teams, and logistics.

The consortium liaison brings an understanding of the strengths of the workshop process and the key factors that contribute to a successful workshop. These factors include the emphasis on partnership building and cross-sector collaboration, the importance of participants attending in community teams, and the presence of a public land manager on each team. The consortium liaison assists the local partners with developing the workshop agenda, takes the lead in securing and working with workshop presenters, and produces the participant materials and workshop notebook.

Together the workshop steering team—the local partners and the consortium partner liaison—designs a program that helps the participating community teams acquire a more comprehensive understanding of regional issues. This leads to local action plans that also relate to broader regional concerns, and creates opportunities for landscape-scale conservation and networking that will benefit all participants.

Chapter 4

Is Your Community Ready for a Regional Community–Public Land Workshop?

Certain things are required to organize a regional community–public land workshop. For starters, you will need funding and people who can commit time and energy to organizing the workshop. It also takes a willingness to collaborate, a concern for local issues, a commitment to one's home place, and a desire to act for the greater good of the community. For the workshop itself to be successful, it requires people who are willing to attend the entire workshop and who are open to listening to other perspectives and working with others. We consider these "readiness" factors. We have found through experience that these regional workshops are predisposed toward long-term success when communities have a clearly defined sense of place or residents have begun to think together about such topics as community character and common values.

It is also very helpful if there already exists a diverse network of partners with established relationships and some history of finding common ground and collaborating across sectors on issues. Preferably, this network extends beyond conservation groups to include the economic and social sectors. If such a network does not already exist, the regional workshop can provide a context for developing a cross-sector partnership in which people learn from and work with neighbors with diverse perspectives. This will require additional work on the part of the organizers, but will have lasting positive impacts for the region. A diverse collaboration can be knitted together by a shared sense of place and a concern for the future that respects and welcomes everyone's contributions to bettering the community or region.

This section of the handbook presents questions and considerations to help you assess the readiness of your community or region. Although your community does not need to demonstrate readiness in all of the aspects described below, because of the time and money investment we prefer to work with communities that have made progress in these areas. If you are unsure of your community's readiness for a 2–3 day workshop, you might want to first participate in one of the other consortium training opportunities that are discussed later in this chapter. You should also touch base with the consortium liaison at some point in this assessment process (see page 5.1).

COMMUNITY READINESS FACTORS TO CONSIDER

As you read through the following statements, think about how your community does or does not display these characteristics.

1. There is a strong sense of civic pride and/or sense of place in my community.
Some indicators might include:

- Friendliness or neighborliness among residents
- A welcoming attitude toward visitors and newcomers
- Periodic community-wide events
- Some awareness of the proximity to adjacent public lands and some level of participation in official and other opportunities for mutual engagement (i.e., public land staff participating in community events or public hearings and vice versa)
- Good participation in community-wide volunteer initiatives, such as clean-up events or food drives
- Good attendance at meetings or discussions (regular or ad hoc) that pertain to aspects of community life
- An ample and diverse field of candidates running for public office
- General recognition of the area's heritage, including natural and historical assets
- Sense of value in protecting and enhancing the area's natural and cultural resources
- Interest by community leaders in building or enhancing economic opportunities through asset-based strategies

2. My community has a history of action that indicates a sense of commitment and cohesiveness and a willingness to act when needed.
Some indicators might include:

- An active conservation commission
- A wildlife tracking program
- A community visioning initiative
- A thoughtfully-developed and locally-tailored zoning ordinance and town master plan
- An open space plan
- Several active community organizations that have a history of working together
- Occasional community-wide events that respond to perceived community needs, whether social, economic, or environmental
- Past community–public land interactions, official or otherwise
- Participation in other formal community development programs (e.g., Main Street Program or Share Your Heritage)[1]

3. Local leaders foster a positive community spirit that welcomes diverse citizen involvement and encourages emerging new leaders.
Some indicators might include:

[1] Main Street Program (http://www.mainstreet.org/content.aspx?page=3564&section=15); Share Your Heritage (http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm)

- A widespread spirit of volunteerism in the community, and many opportunities for volunteers to get involved
- Public land staff who actively seek volunteers from the community
- Local leaders who welcome new ideas and seek alternative ways of doing things
- Instances of organized or ad hoc mentoring

4. Existing relationships among organizations and with public land managers demonstrate cross-sector collaboration that could be helpful to a community–public land initiative.
Some indicators might include:

- Previous successful interaction between local organizations and community officials or leaders (including public land managers), whether ad hoc or organized around a community or public land initiative
- Ongoing cooperation between organizations and agencies within the broader region
- A sense of trust and open camaraderie, rather than hostility, among important stakeholders
- Established communication networks between public lands staff and community leaders

5. In my community there are partnership opportunities that have relevance to community–public land issues.
These opportunities might include:

- Local businesses that cater to tourists
- A school curriculum that makes use of public lands
- A local environmental organization that works or volunteers in the community and/or collaborates with public land agencies
- A willingness to engage diverse players and work openly and inclusively
- Access to other recreational resources (lakes, rivers, etc.)
- Community interest in providing linkages between recreational resources, including with public land
- A strong tourism economy
- A range of public land management entities or local, state, and federal agencies within the region

6. There are other things going on in my community that could provide connections and/or resources for a community-wide initiative.
These might include:

- Local publication(s) that spotlight the town
- Existing festivals and other community events
- Upcoming celebrations (e.g., tenth anniversary of a town park) or other “recognition-type” events
- Cultural heritage celebrations that are relevant to both the community and neighboring public land

- The presence of ongoing, regionally-focused efforts that my community's efforts might align with (e.g., heritage area plans, resource assessments, regional planning, or other partnership efforts)
- Interest in heritage-based tourism or other opportunities to capitalize on the natural and cultural resources of the area for greater community benefit

7. My community is currently facing a situation that has the potential to affect the quality of life for residents and we do not have a clear mechanism for citizens to work together to address it.
Some examples of such a situation might include:

- The major employer in town is moving operations to another state
- There is a large development project planned that threatens to overwhelm our rural lifestyle and community infrastructure
- New regulations are being discussed in the management of adjacent public lands that will change how residents can access and use the recreation areas

In addition to the above, you might want to consider one other factor that could influence your ability to engage key people as organizers, steering team members, or workshop participants. Because this factor can affect your organizing ability, it is important to consider whether or not this situation exists in your community.

8. At the moment, are there any other initiatives in my community that might duplicate, be redundant with, or compete for attention with the community–public lands workshop?

ALTERNATIVES TO A REGIONAL COMMUNITY–PUBLIC LAND WORKSHOP

If you are unsure whether your community is ready for a multi-day workshop, you might consider other offerings available from the consortium partners. In the descriptions below we have included cost estimates based on past activities conducted in 2005-2006. The cost for any specific activity or event will vary depending on local needs and the resources available.

Interactive Web-based or Television Broadcasts
Distance learning broadcasts are offered on an annual basis through The Conservation Fund's Conservation Leadership Network, located at the National Conservation Training Center in Shepherdstown, West Virginia. These broadcasts are either web-based or broadcast through an interactive television (ITV) set-up. Two types of broadcasts are offered: short, focused programs on defined topics of interest or longer, interactive workshops. For either the web-based or television broadcast, participants have the opportunity to submit questions to the presenters via phone, fax, or email. Community "group viewing" of the broadcasts is strongly encouraged as discussion questions are provided. With the interactive workshops, manuals containing group exercises are provided. Topics developed to date for these workshops include:

- Gateway Communities: Keys to Success
- Building Partnerships between Gateway Communities and Public Lands
- Sustainable Tourism: How to Start a Sustainable Tourism Program

For copies of past broadcasts, or information on upcoming broadcasts please contact The Conservation Fund (see page 1.4).

Cost to the community: Free, although for a webcast you will need to locate a classroom with a suitable internet connection and large screen display. For an ITV workshop you will need to locate a downlink site, which will require a digital or analog (steerable) satellite television connection, a room with a television or other screen adequate in size for the number of participants, and access to telephone or fax in the room. Some federal facilities have digital satellite capability, and in the past public land managers have helped to arrange for a downlink site. A number of community facilities (e.g., community colleges, universities, and libraries) may have suitable facilities for either webcasts or analog satellite access.

Consortium partner contacts: The Conservation Fund, U.S. Fish and Wildlife Service

One-Day Community Partnerships Forum

For communities and public land managers just beginning to explore collaboration, this workshop provides an opportunity to engage public and private stakeholders in discussing collaborative conservation issues and concerns. Through facilitated dialogue, participants identify key assets within the region and strategies to enhance these assets. Using small group break outs, participants work together to explore areas of common interest, identify potential projects, and craft partnership strategies to move those initiatives forward. In this way, the forum demonstrates the benefits of collaborative planning and cross-sector partnerships. A community partnerships forum usually draws between 30 and 50 people. To ensure broad cross-sector involvement, participation is by invitation (with follow-up phone calls to guarantee the response). The responsibilities of organizing the forum are shared between the consortium partner and a local steering committee.

Cost to the community: $12,500, which includes the services of the consortium partner liaison who guides the local steering team, facilitation, keynote speaker honorarium and travel, facility and food costs, and other administrative expenses.

Consortium partner contacts: Conservation Study Institute, The Conservation Fund

Sponsorship of a Team at the National Training Course

The four-day national training course, "Balancing Nature and Commerce in Communities That Neighbor Public Lands," is held annually in late January at the National Conservation Training Center in Shepherdstown, West Virginia. This comprehensive course offers an opportunity to learn more about common issues and tools that are available to address them. Teams develop action strategies for their own communities. Putting together a team to participate in the national course prior to initiating a regional workshop is an excellent way to build capacity and generate interest in bringing a workshop to your area. In the past, team members who have attended the national course have become the nucleus of a steering team for a regional workshop.

Cost to the community: Approximately $4,100, which includes tuition, lodging, and meals (but not travel) for a team of six. Often teams are able to find funding to offset the cost of participation.

Consortium partner contacts: U.S. Fish and Wildlife Service, The Conservation Fund, Conservation Study Institute

Vision-to-Action Forum

A Vision-to-Action Forum is a 1½-day, facilitated community dialogue that identifies and builds on community assets to shape a healthy and sustainable community for the future. The forum is designed to foster participation from a wide range of citizens and is open to any member of the community. It provides an opportunity for residents to gather in a neutral setting, take stock of assets and problems, identify key issues, develop a common vision for the community, and define community-based action steps to address the issues. The agenda includes full-group discussions and small-group sessions, allowing participants to delve more deeply into issues and learn from one another. The forum ends with the launching of several citizen action initiatives. Most forums draw 100 to 250 participants from all sectors and age groups, including students.

The forum is grounded in two beliefs: (1) that our motivation to participate in community affairs comes directly from a strong sense of place—a deep understanding of and concern for the landscapes and people of our home ground, and (2) that people are eager to contribute their time to initiatives that they have participated in and see as relevant to their lives. With skilled facilitation, community members are able to identify common concerns and develop broad-based solutions that have a greater chance for success because they have been tempered by exposure to diverse perspectives. The Vision-to-Action Forum relies on a group of local volunteers who act as a steering/organizing team and are responsible for promoting the event. The consortium partner provides coaching throughout the project, including facilitating the forum, but does not carry out the day-to-day organizing. For that reason, the key to success is finding a team of local volunteers with leadership skills who will lead the organizing effort and the forum process.

Cost to the community: $15,000, which covers the services, travel, and administrative costs of the consortium partner liaison, who helps launch the process through presentations to key local groups, guides the steering committee, trains a team of small group facilitators, and acts as lead facilitator for the event. It does not include facility rental, food, promotion, copying and other costs, which must be raised locally and/or donated.

Consortium partner contact: Conservation Study Institute

NOTES

Chapter 5

The First Steps

Once you have decided that you want to hold a regional community–public lands workshop, what comes next? The important first steps are to (a) contact a consortium partner, (b) develop a brief description of the workshop, including goals and desired outcomes, (c) engage and enlist key stakeholders, (d) put together a workshop steering team to help with the planning and organizing, and (e) develop a budget and begin fundraising. These are the steps that need to happen—although not necessarily in this order—before you proceed with the organizing that is covered in the chapters that follow.

Contact a Consortium Partner

If you have not already done so, it is important to talk with one of the consortium partners (see page 1.4) to discuss your desire to hold a regional workshop. A consortium partner liaison can assist you in thinking through the following:

- the issues and challenges you want to address
- why and how you think a community–public land workshop will help you address these challenges
- your goals for what you want to accomplish through the workshop
- what "region" you are considering
- who the key stakeholders are (and also potential steering team members)
- timing of the workshop
- your budget components and fundraising needs

It is important to discuss timing with the consortium partner liaison so that the workshop fits both your needs and the consortium partner's availability. You might also enlist a few local "thinking partners" to help you sort through these topics. Once you and the consortium partner have agreed to move forward, you can decide on a tentative date (subject to funding) and move ahead with the preliminary steps described below. The consortium liaison will touch base with you periodically during this period to see how things are proceeding. Once you begin the actual organizing (the work beginning with chapter 7), the liaison's contact will be more regular.

Develop a Brief Description of the Workshop Project

From the conversations described above, you should be able to prepare a one-page description of the workshop. Include some initial goal statements, your thoughts on how a community–public land workshop will benefit your region, your desired outcomes, the potential target audience, etc. This will be your tool for talking with people. Mark it "draft concept paper" and ask for input from a variety of perspectives. This openness helps to build bridges with prospective partners and encourage a sense of ownership. Remember that some of these people may be new to conservation. Think about why they should be involved, what might appeal to them about the workshop, and what reasoning might influence them to participate. Then, in writing and talking about the workshop project, use language that is accessible to the general public and avoid using wording or terminology that will alienate people who are essential to the project.

ENGAGE AND ENLIST THE SUPPORT OF KEY STAKEHOLDERS

Building a diverse partnership is essential to a successful workshop. Identify the key stakeholders (people and organizations), public land managers and staff, and important community leaders, and talk with them about the community–public land workshop. There may be key leaders who will not actively participate with workshop planning, but will need to know about the project in its earliest phases in order to buy in to the workshop. When identifying important stakeholders, don't think only about potential supporters, but also those who could dismantle any progress if they were not involved. Anticipate the conversations you will have with these people, try to understand their perspectives, and think about the stakes they have in the gateway issues and how they will benefit from a successful workshop. Consider what you may have in common (e.g., long-time resident, a sense of place and community, the desire to have a vibrant and successful community, or an interest in capitalizing on the public land resources, whether for economic benefit, place-based education, or recreational access). You may want to include some of these values in the concept paper and use them in your conversations.

Remember that with some constituencies you may be the first person to have asked them to participate in a project of this nature and they may not embrace your ideas right away. Don't write them off, however—try to find some common passions or values. In most cases these do exist, but may be buried behind positions or past history. Try to find opportunities to interact in a social setting. Sometimes getting to know someone as a person (apart from the organization that he/she represents) unlocks the door to a working relationship. Also, think about the language you use when having these initial conversations, and what terms may be negatively perceived in your community. Then you can phrase things in ways that are less controversial.

FORM A WORKSHOP STEERING TEAM

By this time you should be thinking about who should be on the steering team. There is no set size; the important factors are to find a balance of interests and people who are dependable and who will commit time, energy, and resources to the effort. Enlisting a few community leaders is also good, even if their ability to commit time is limited. You can undoubtedly find other ways for them to participate. As you think through the steering team composition, ask the following questions:

- Who is critical to making the workshop a true partnership effort?
- What organizations and institutions in the region are well networked?
- Who from the public land agencies would best contribute to the steering team?
- Who might provide connections to funding sources?
- What organizations or individuals would you like to see involved in the follow-up activities?
- What people, agencies, or organizations are essential to resolving some of the critical issues or problems that are present in the region?
- Is there a commitment from the public land managers and key stakeholders in the area to join in the workshop planning process?
- Is the mix of people being considered representative of the interests of communities in your workshop region?
- Does the mix of people being considered include people who have a big-picture vision for the region as well as people who understand the challenges facing local communities?
- Who might enhance the capacity of the steering team to support action projects?
- If you're working at the regional scale and your effort includes multiple jurisdictions (i.e., counties, states, townships), do you have representation from these multiple communities or jurisdictions?

Building a broad-based network of support will add to the success of the project. The workshop steering team should model the collaboration that you desire in the teams that participate in the workshop. A collaborative process brings greater knowledge, expertise, and resources to the effort. A well-balanced steering team will include representation from the following:

- Public land agencies, federal and/or state, that are important players in the region
- Respected business leaders and/or a community development institution
- Local government leaders in the region
- Staff from statewide or regionally active planning groups (e.g., councils of government, regional planning commissions, and transportation interests)

- Relevant nonprofit or community groups
- The consortium partner

DEVELOP A BUDGET AND BEGIN FUNDRAISING

It will be necessary to put together a budget and begin fundraising as soon as possible. The organizing described in chapters 7–15 doesn't begin until you have raised half of the funding needed to deliver the workshop and have good prospects for the remainder. Talk over potential funding sources with steering committee members and the consortium partner liaison assisting you. Funding can come from a variety of sources, including:

- Private foundations (community foundations are a good bet)
- Local sources in your community or region (e.g., corporations, banks, or sponsor organizations)
- Individual donors
- Government sources (e.g., National Park Service Challenge Cost Share Program, U.S. Department of Agriculture rural development funding programs). These and other agency funding programs are included in *Opportunities for Communities That Neighbor Public Lands: A Guide to Federal Programs*, a publication of the Conservation Study Institute that is available online at http://www.nps.gov/csi/pub_resources/pub.htm

See chapter 6 for more details on developing a budget and fundraising. See also the discussion on page 7.3 regarding staffing, as that has budget implications.

CHECKLIST

- ❒ Discuss with the consortium liaison such preliminary topics as the issues to be addressed, your goals and desired outcomes for the workshop, the stakeholders, budget and fundraising needs, and the time frame
- ❒ Enlist a few "thinking partners" to help you refine the workshop focus
- ❒ Prepare a one-page "concept paper" to use in talking with potential local partners
- ❒ Make a list of key stakeholders, community leaders, and public land managers and talk with them about the workshop
- ❒ Form a workshop steering team
- ❒ Develop a preliminary budget
- ❒ Begin researching potential funders

NOTES

Chapter 6

Raising the Necessary Funds

It will be essential to begin your fundraising efforts immediately, as your ability to stay on schedule and deliver the workshop as planned will depend on obtaining funding in a timely manner. The main steps in the fundraising process include (a) preparing a budget, (b) identifying in-kind contributions, (c) deciding on a fiscal agent, and (d) preparing and implementing a fundraising plan. The workshop design process will begin with a steering team "kick-off" meeting once 50 percent of the total funds have been raised, so it is important to allocate at least three to six months of the project schedule for fundraising.

Preparing a Budget

You will need to calculate the costs associated with workshop development and overall project coordination, as well as the costs associated with the workshop itself. The consortium liaison will help you with this task. The costs of workshop development and project coordination include:

- salaries and associated personnel costs (all included in the "personnel" line in the sample budget on page 6.4)
- telephone and fax
- travel
- postage and shipping
- photocopying
- supplies

Please note that the personnel line in the sample budget represents the cost of the consortium partner liaison and does not include funds to support local project coordination and leadership. You may want to consider whether it will be necessary to raise additional funds to support this function.

The costs associated with holding the workshop may include:

- a facility fee associated with the use of meeting space
- food for meals and breaks
- instructors (travel, lodging, and fees or honoraria)
- participant expenses (see discussion next paragraph)
- workshop materials and supplies
- field trip expenses (if applicable)
- additional resource materials

Past workshops have covered instructor travel, lodging, and meals, and these expenses are included in the sample budget. You will also need to consider participant lodging, meals, and travel (which all fall under the label "participant scholarships" in the sample budget). Some workshops have covered some or all of these expenses for participants (you can ask for a small registration fee to help offset these if you are generous with what you are covering), while others have offered scholarships to help defray costs. The budget line for workshop materials includes the comprehensive workshop notebook that will be given to each participant. The sample budget also includes a follow-up meeting for participants, which is usually held 6 to12 months after the workshop.

An item not in the budget that you may want to consider is an evening reception and/or program during the workshop. All of the above topics are discussed in greater detail in other sections of this handbook.

Once you have estimates of the above costs, you can lump like categories so that your budget approximates the sample budget, as follows:

- Personnel (consortium liaison time and benefits, instructor fees, additional staff or interns)
- Travel (liaison travel to a scoping meeting, instructor travel)
- Workshop materials and resources (course notebooks and supplies)
- Telephone, printing, copying, shipping
- Facility and food costs
- Participant scholarships (estimated to cover room and board for 20)
- Follow-up meeting for participants

Then you can add everything up and assess 20 percent for overhead. This covers the numerous indirect costs that organizations bear in coordinating projects, including bookkeeping and budget management, project reporting, and computer wear and tear. This amount will go to your fiscal agent (see next page) to offset costs.

IDENTIFYING IN-KIND CONTRIBUTIONS AND OTHER MEANS OF DECREASING THE BOTTOM LINE

You may be able to decrease the amount of cash that you will need to raise. In-kind contributions are donated services or project expenses that are covered by others. Often these contributions can help leverage needed cash grants. Every situation is different, but here are some items to consider:

- You may be able to negotiate a package deal with the conference facility. Some places will not charge for meeting space if participants will be lodged and fed on site. Or they might give you a break on the per-room cost of lodging. If a nonprofit organization is handling the funds you raise, the facility may consider a decreased package cost as a charitable contribution.

- One or more local organizations may be willing to help cover the costs of an evening reception, one or more workshop meals, etc., especially if they will benefit later from workshop follow-up.
- Workshop partner organizations may be able to absorb some incidental expenses such as copying, telephone or fax, and recordkeeping.

Other possible in-kind contributions that can be tracked include the time that steering team members contribute to workshop planning and instructors' planning time.

Some funders may specifically ask that you match a portion of your requested funds with other dollars or in-kind contributions. (For those who don't, you can indicate the general nature of the in-kind contributions, even if you don't state a dollar amount, to show community support for the workshop.) If you are using in-kind services to help match cash funds, you may need to keep good records of staff time and donations throughout the project. Good recordkeeping will enable you to provide the match figures in reporting to foundations and in requesting funds for follow-up projects.

Deciding on a Fiscal Agent

For grant applications you will need to identify an organization to serve as fiscal agent. The fiscal agent's responsibilities include holding and distributing the funds and overseeing budget management. This organization should be a nonprofit, should have a mission statement consistent with the activities of the workshop, and should be represented on the steering team. The overhead mentioned earlier is usually paid to the fiscal agent to offset the indirect costs that the organization incurs in that capacity.

Preparing and Carrying Out a Fundraising Plan

Once you have a budget prepared and know your fundraising target, steering team members can help you brainstorm and prioritize potential funding sources. These can include private foundations; local, state, and federal funding programs; and individual or corporate donors. The next step is to gather information on funders' criteria, guidelines, grant-making processes, proposal deadlines, and decision dates. You should assign someone to prepare proposals. You can use your concept paper to help develop "boilerplate" language on workshop goals and objectives, content, and process, and on who will benefit, both short-term and long-term, from the workshop. (This language can also be used later in workshop marketing materials.) Create a chart with the foundations, deadlines for submission, and decision dates, and track fundraising progress.

Once you have submitted a proposal, check with the funder to make sure your application is complete. Sometimes a funder will request clarification or additional information, but after that it is a waiting game. It is important to have back-up options and not pin your hopes on one funding source. Once you have raised half of your budget, you can proceed with workshop planning, so celebrate! But don't get too far ahead in setting a date or committing to a facility until you are sure of securing the funds you need.

Estimated Budget for Customized Regional Workshop
(estimated for a three-day workshop for 40 participants)

Expense	Cost
Personnel*	$20,000
Travel**	8,000
Workshop Materials and Resources	5,000
Printing, Copying, and Shipping	700
Facility and Catering Costs	3,000
Participant Scholarships***	7,000
Follow-up Meeting for Participants	3,000
Subtotal	**$46,700**
Overhead	9,300
Workshop Design and Delivery Total	**$56,000**

* Includes consortium liaison staff time and instructor fees; does NOT include staff time for the local steering team.
** Includes consortium liaison travel to the first steering team meeting and instructor travel to the workshop.
*** Estimated to cover room and board for 20 participants.

CHECKLIST

❒ Prepare budget

❒ Decide on fiscal agent

❒ Identify and prioritize funding sources and gather application information

❒ Prepare and submit proposal to top funding choices

❒ Create tracking chart with deadlines and decision dates

NOTES

Chapter 7

Getting Started: The Steering Team Kick-off Meeting

The major responsibilities of the steering team are to define the project goals, plan the workshop, solicit the funding, and keep the organizing moving along. Getting the right mix of people involved and having a substantive, well-run first meeting to discuss the goals and major tasks will start the workshop organizing on a positive footing. If the team as a whole creates a common vision for the workshop and everyone helps shoulder the load, a sense of partnership will be generated. It is this process that creates the investment and group synergy that will ultimately bring success to the workshop. If the overall steering team vision includes follow-up, then there will be group investment in an outcome that reaches beyond just the workshop itself.

The consortium partner liaison will help you plan a "kick-off" meeting of the steering team. At this first meeting you should aim to achieve team clarity and consensus on the goals and desired outcomes of the workshop, agree on the target audience, and assign responsibility for key organizing tasks. It will be important to determine who from the region will assume overall leadership responsibility for your effort. Although the consortium liaison will attend the kick-off meeting and will provide guidance and assistance at various points in the organizing process, it is primarily the steering team who will lead the organizing and carry out the many tasks necessary to make the workshop a success.

The kick-off meeting will officially initiate the workshop planning process and help set the framework and tone for the work that follows. For this reason, it is best to hold the meeting after the composition of the team is essentially complete and to strive for full attendance. Plan for an in-person meeting—most kick-off meetings take a full day and there may be team members who have not previously worked together. Although future meetings can be held by conference call, the dynamic of collaboration is improved if everyone has a chance to meet, observe each other's style, and achieve some voice recognition.

The agenda for the kick-off meeting should include the following topics:

- **Setting the context: overview of the community–public land workshop**
  The consortium liaison will provide a brief background on the workshop approach and key success factors.

- **Steering team introductions**
  Allow time for people to introduce themselves and to say why they are interested in collaborating on the workshop.

- **Steering team makeup**
  Talk about the public-private partnership that the workshop represents, the diverse collaboration you seek, and why this initiative is important. Discuss potential workshop sponsorship. Ask if anyone who should be part of this initiative is missing from the steering team. Is the steering team as a whole representative of the various communities that will be invited to the workshop?

- **Workshop goals and desired outcomes**
  Planning always begins with talking about where you want to end up. Discuss what steering team members hope to achieve through the workshop and decide on goals and desired outcomes for both the workshop and the follow-up. (See appendix A for goal statements from past workshops.)

- **Target audience and marketing strategy**
  Who should attend the workshop and how will you reach them? The audience you identify will have a bearing on many other aspects of workshop planning, especially session content, marketing, and team selection. Discuss briefly the need for teams (and whether they should be organized by community, more regionally, or by themes), readiness issues, selection criteria, and an application process. (See chapter 8 for more discussion on target audience.)

- **General workshop focus and modules available**
  Questions you will want to discuss include: What is the scale of the region that participants will represent? What are the issues and challenges facing the region's public lands and adjacent communities? Do the modules that are currently available adequately address these issues? (See chapter 9 for a complete discussion of the modules available.) What tailoring might be necessary to adequately address the pertinent issues and challenges? Are there local case studies that can be used as examples of on-the-ground efforts? Is the steering team interested in new module(s)? Discuss the budget implications of developing new modules.

- **Potential workshop dates and location**
  Identify potential dates or a time frame that makes sense for the workshop. In considering dates, take into account the amount of time needed to obtain the necessary funds. Also brainstorm possible locations, with factors including ease of travel and costs to participants.

- **Budget and fundraising**
  Have the budget ready for discussion. Clarify the remaining amount of funding needed and, if necessary, brainstorm possible sources, the time frame that will be required, and who has lead responsibility for the remaining fundraising. Discuss budget management responsibilities. Touch on local support (including reduced rates from possible conference facilities) as relief from the total funds needed. Make sure that the steering team adequately addresses these topics and assigns tasks; obtaining the needed funding is key to meeting your desired timeline.

- **General work plan, leadership responsibilities, steering team chair, and subcommittees**
  The consortium partners have developed a master work plan/timeline (see appendix B) that will help you stay on track with organizing. The work plan also lists who is responsible for each task and for product deadlines. Although you do not need to make all assignments at the first meeting, you should pin down certain major tasks (if they have not yet been decided), such as who will chair the steering team, who will take the lead on the remaining fundraising, and who will manage the budget. You may also want to form subcommittees for investigating workshop sites, marketing and outreach, and developing workshop content.

- **The need for staffing**
  The steering team will have to decide how to get the organizing done. This will involve discussing which tasks the team members can cover and how to accomplish the rest—that is, whether to rely on existing staff at a partner organization, interns, or volunteers. You may decide to hire a project manager who can work closely with the steering team chair to manage the workshop timeline, serve as the point person for all organizing activities, coordinate communication, and disseminate information to the steering team as necessary. Adjust the personnel line of your budget if necessary.

- **Steering team communication and meeting schedule**
  You should establish how you want to communicate within the team (e.g., meetings by conference call or in person, use of email), review how often the steering team will meet, what kind of recordkeeping of the meetings you want, and establish a meeting schedule.

Many topics from this first meeting will be revisited in later meetings, and other sections of this handbook provide details and guidance for much of this work. In preparing for the kick-off meeting, you may want to review the sections that follow in order to help answer questions that might arise. You may also want to circulate portions of the handbook to steering team members prior to the meeting.

CHECKLIST

❒ Assess steering team make-up and the need for additional members

❒ Hold the first steering team meeting

❒ Reaffirm workshop goals and desired outcomes

❒ Discuss target audience

❒ Decide on the major responsibilities
  - Chairperson
  - Fundraising lead
  - Budget management lead

❒ Clarify the staffing needs and decide roles and responsibilities of staff

❒ Adjust the budget as necessary

NOTES

Chapter 8

Determining the Workshop Target Audience

The steering team will have discussed the target audience at its kick-off meeting. It is important to discuss this topic in depth, as it will affect a lot of the organizing work (e.g., developing the workshop agenda, determining criteria for selecting teams, planning a marketing and outreach strategy). So if the steering team addressed target audience only generally during its first meeting, set aside time in the next meeting for a more in-depth discussion. Keep in mind that there is no "right" audience—in fact you may want a mix of backgrounds so that those participants with more experience can share their knowledge with less-experienced ones. One of the more rewarding aspects of the workshop is that teams and participants learn from each other.

An important factor to be aware of, however, is the level of community readiness, including the capacity of communities to constructively address regional issues and the nature and maturity of its working relationships. (See chapter 4 for more details.) You may also want to discuss the nature of the interaction between communities and public lands in your region. Sometimes the working relationships between public land managers and communities are well established; other times they are less so.

Also important to this discussion is the idea of participating in teams. The workshop is structured to build a team working relationship, so participations by individuals is not appropriate. We have found from experience that teams composed of both community members and public land managers are more successful.

Thinking through your target audience will add clarity to later outreach and marketing efforts and will aid in selecting participant teams. (See chapters 11 and 12 for more on these topics.) Some questions to ask might include:

- Are we looking for communities that have done little or no work on regional concerns?
- Should the communities have had some success with addressing these concerns but anticipate tough issues yet to come?
- Do we want communities at the very beginning of the learning curve on partnerships?
- Do we want communities with some track record of cross-sector collaboration but no work on pertinent issues?

CHECKLIST

❐ Schedule time at an early steering committee meeting to come to agreement on target audience

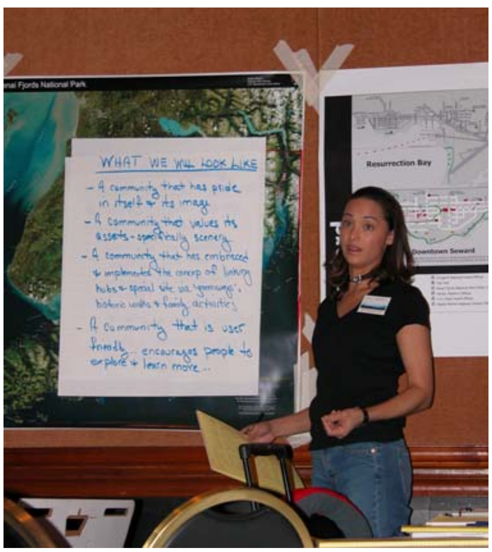
NOTES

Chapter 9

Developing the Workshop Agenda

Developing the workshop agenda is a major part of the steering team's work. The team as a whole should make the decisions regarding the overall agenda focus, but you may want to use a smaller group to work out the content details. In forming the agenda, be mindful of the desired workshop length. Typically, regional workshops have been 2½ to 3½ days in length.

The consortium partners make available to regional workshops the curriculum modules from the course "Balancing Nature and Commerce in Communities That Neighbor Public Lands." These modules and their accompanying materials are comprehensive and designed to address common regional community–public lands issues. You may, however, want to tailor the module content to better fit your region's situation. If you have issues or challenges that are not covered by these materials, the consortium partner you are working with can provide assistance in developing a new module. Extensive modifications to existing modules or development of new modules, however, may affect your budget. The consortium liaison can talk through the budget implications of any changes you wish to make.



As you design the workshop to meet your needs, you should make sure that everyone is well-versed on the target audience. As you make your decisions on desired modules, you should also compile a list of potential instructors for each module. Some instructors who helped to develop the national course may also be available. Other considerations include a workshop facilitator and whether to use case studies.

This section covers agenda planning in detail, including (a) the curriculum modules, (b) tailoring the modules, (c) using maps, (d) other agenda components, (e) the instructors, (f) the workshop facilitator, and (g) other considerations. See appendix C for sample agendas.

Curriculum Modules

The curriculum modules include the core modules used in every community–public land course or workshop as well as others that add content according to regional or community needs. For the purposes of this handbook, the modules are grouped by theme. Each module has its own learning objectives and talking points that relate to the overall goal of building the capacity of communities and public land managers to jointly address community–public land issues. The steering team should review these learning objectives and tweak them as necessary to fit the regional situation. The typical length of each module is 1 to 2½ hours. The modules include:

Overarching Themes

- **Introduction to Gateway Communities**
  This session introduces the concept of a community "gateway" to public lands. Participants learn about issues and trends, the synergistic relationship between public lands and adjacent communities, changing economic forces that influence rural areas and public lands, and the benefits of protecting and enhancing the shared assets. They also learn about collaboration and civic engagement as tools for enhancing communication and building a common vision and goals. We recommend that a public land manager from the region co-present this session with a consortium partner.

- **Regional Overview**
  This session provides an overall regional context, including background on public lands, history of gateway issues, and various trends that influence the situation (e.g., demographic, economic, social, recreational, and tourism-related). The objective is to create a common understanding of the regional "playing field."

- **Building Long-Term Partnerships**
  Using case studies that highlight partnership opportunities and challenges, this module presents best practices for initiating and building successful gateway partnerships. Discussions address such questions as: Why cultivate partnerships? What are the key ingredients for a successful partnership? What are the challenges to creating effective partnerships? What tools can be used to cultivate long-term partnerships? There are two case study videos (see page 9.8) that can be used in this module.

- **The Dollars and Sense of Protecting Community Character**
  Participants learn about the economic, social, and environmental benefits of protecting community character, and the value of open space and historic resources. They are introduced to tools for preserving community character and alternatives to conventional residential and commercial development. The module addresses common challenges and offers ways to generate public support and the political will to act. Many examples demonstrate what successful communities have done.

Team Planning Themes

Team planning sessions are scattered throughout the workshop, which helps teams process the information being presented and apply it to their own situations. Two specific sessions open and close the planning sequence.

- **Mapping Your Gateway Community**
  To illustrate, visually and conceptually, the interdependency of public lands and neighboring communities, participants assess and map (a) their communities and adjacent public lands, identifying the physical, cultural, social, institutional, and economic assets that influence the public land–community relationship; (b) the common issues of concern; and (c) the institutions and individuals whose participation is needed to address these issues. The maps produced serve as the foundation for other planning exercises as the workshop proceeds. See appendix D for team instructions to this session.

- **Developing an Action Plan**
  Each team produces a workable action plan for the next 6–12 months, identifying objectives, needed technical and/or financial resources, and other stakeholders to involve. They list potential barriers to completing their action plans and strategies for overcoming these barriers. Each team member decides on specific next steps to undertake upon returning home. By focusing on near-term, feasible actions, the team leaves with a plan that will ensure a credible track record (helpful in follow-up fundraising), generate momentum, and produce results to celebrate. See appendix E for team instructions for this session and sample action plans.

Conservation Themes

- **Land Conservation Tools and Strategies**
  This session focuses on land conservation as a means of protecting community assets. The instructor discusses the role of land trusts and various tools for conserving land such as conservation easements and transfer of development rights, as well as programs that enhance land conservation, such as brownfield restoration and agricultural economic development programs. Examples of communities that have used these tools and programs are provided.

- **Strategic Planning for Land Conservation**
  In this session, strategic conservation planning is introduced as a tool communities can use to identify, prioritize, and protect their natural and cultural assets while planning for new growth and development. The instructor will discuss the "green infrastructure" approach—i.e., creating an interconnected network of protected green spaces that serves as the community's natural life sustaining system—what it is, what it "looks like," its benefits to nature and people, and strategies for success. Team exercises will help to bring these components to life.

- **Protecting Cultural Heritage**
  This session provides an overview of cultural heritage resources, describes participatory approaches to inventorying cultural assets, and reviews how heritage preservation can revitalize communities and provide economic development opportunities. Topics include the contribution of the

cultural landscape to sense of place, economic vitality, and visitor experience; strategies for restoring and maintaining cultural sites and traditions; the importance of preserving folklife and cultural traditions as important "resources" (similar to preserving natural and cultural features on the landscape); and cultural heritage tourism.

Economic Themes

- **Sustainable Tourism**
  This session examines the role and effects of tourism in gateway communities and on public lands, and presents methods to manage tourism to maximize benefits and minimize negative impacts. Participants learn the economic benefits and costs of tourism, strategies to create local opportunities for ecotourism and heritage tourism, the importance of a tourism management plan, and the principles of sustainable tourism, as well as how to apply these guidelines in their own communities. Numerous case studies illustrate the discussion.

- **Understanding Your Local Economy**
  This module helps non-economists link community well-being and environmental health to economic prosperity. Participants are introduced to information and tools related to economic and demographic trends to better understand how a changing economy affects the environment. They learn how to interpret statistics and use trend analysis within a community setting, and how to generate and use a community socioeconomic profile to change local attitudes and influence development.

- **"Understanding Your Economy" Team Exercise**
  In this facilitated exercise, each team is provided with socioeconomic profiles for its county and/or municipality and guided through a series of questions to help members better understand the types and value of data included in each profile. This session helps participants become more familiar with the economic and demographic trends in their communities and better understand how this data can be used in local planning efforts.

- **Measuring the Impacts of Growth and Development**
  This session examines how public and private lands and other community assets influence local growth patterns and economic development. Participants are introduced to tools, such as build-out scenarios and "cost of community service" studies, that can help them measure the fiscal impact of development before land use decisions are made. Examples show how communities have used these tools to address conservation and economic development challenges and to influence community attitudes.

Social Themes

- **Community Visioning**
  This session examines the community benefits of a well-defined vision and how to present a compelling rationale for building a common vision. Participants discover that an engaged local citizenry is the link between vision and stewardship. They learn how to design an effective vision-to-action process and, through case studies, observe how this process can work successfully in real life. The module includes a group visioning exercise that examines potential barriers.

- **Engaging the Community**
  This module explores the principles of civic engagement and the benefits of citizen involvement in civic affairs. Participants discuss the difficulties of putting civic engagement principles into practice and examine strategies for overcoming obstacles and distrust and gaining citizen collaboration. Examples illustrate how community leaders and public land managers have built trust and community partnerships to effect change, including the use of place-based education and conservation initiatives.

- **Place-based Education**
  Participants learn about place-based education as a community engagement strategy for immersing student and adult learners in local heritage, cultures, landscapes, and issues. By bringing community resources into the learning process, and the energy and skills of learners of all ages to bear on local issues, place-based education provides citizens with skills that help them contribute to the stewardship of their communities and neighboring public lands. Participants explore principles of place-based education and experience one place-based strategy in depth.

- **Facilitating Positive Civic Engagement**
  This session provides the facilitation skills needed for encouraging dynamic, rigorous dialogue among the diverse community representatives participating on the community–public land teams. This may be offered as a "pre-workshop" session with the requirement that at least one participant from each team attend; they then have the opportunity to "practice" these skills at the workshop during team planning exercises.

The number of modules in your workshop will depend upon the regional issues and challenges and the desired workshop length. Topics that do not currently exist in the curriculum library can be developed for an additional fee.

Tailoring the Modules

As you consider these modules, review the associated learning objectives (which the consortium liaison will provide) and determine whether they meet your overall workshop goals. You may want to modify the objectives or a particular team activity, add additional talking points, or identify potential case studies from your region as part of this tailoring process. The consortium liaison will assist with this effort.

Using Maps

Maps are effective learning and team-building tools. For teams that have not worked together before, the process of discussing and mapping assets helps to draw out common values regarding place and community. Each team should come with a large **community map** that can serve as the base map for team asset mapping and action planning.

In addition, the steering team should prepare a large **regional map** suitable for posting on the wall of the main workshop classroom. This map can be used to illustrate how community assets and problems cross community boundaries. During the workshop it will become the focal point for many discussions and a catalyst for collaborating and strategizing at a landscape scale. This map should be based on current GIS data and include the following layers or components: roads, political jurisdictions, public (local, state, and federal) lands, hydrology (water bodies), and conservation lands not in public ownership (if this information is available). Participants will be asked to add items to the map each day during the workshop, so it is important that it be large enough not to get too cluttered.

Most likely you will have someone on the steering team with access to GIS capability who can produce the regional wall map. In several workshops a steering team member from the National Park Service has provided the regional map.

Other Agenda Components

As you begin to put together the sessions in your agenda, you will need to ensure that the various modules are sequenced to provide a smooth content flow. There is no set order; rather, it depends more on the desired subject mix and balance, some of which may be region-specific. In certain instances, a logical sequence will be obvious, e.g., placing the Introduction to Gateway Communities and Regional Overview sessions early in the workshop, where they will provide a context for what follows, and having a final action planning session near the end so it can add team energy for moving forward.

Additional agenda components to consider include a welcome and general introduction, evaluation and closing comments, evening activities, meals and beverage breaks, field trips and/or case studies, daily remarks and announcements, and a closing activity. Some of these items are covered in greater detail in chapter 13, but are discussed below for agenda planning purposes.

If you decide to schedule concurrent sessions, you should build team discussion time into the agenda for team members to share with their team what they have learned from the concurrent sessions.

Welcome and Introductions

Plan for at least an hour-long opening session, which will include the welcome, introductions, sponsor recognition, and overview of the workshop goals, agenda, logistics, and expectations. The session leader should briefly review the workshop notebook and instructional methods. There should also be an "icebreaker" activity of some sort, guided by the workshop facilitator, in which participants introduce themselves and share something with the larger group (e.g., their vision for the region's future, their expectations for the workshop, or their reasons for participating). This session needs to be well managed in order to stay on time.

Evening Activities

Evenings can offer learning and networking opportunities of varying formality. You may want to consider the following:

- A **reception hosted by the local community**, which gives the local hosts a chance to tell their story (or, if appropriate, provide a case study) and allows participants to interact informally with a broader group. With plentiful hearty appetizers, such a reception can serve as dinner.
- A **reception followed by a keynote speaker**, a variation of the above
- An **activity that highlights local culture**, such as contra dancing, storytelling, or a performance by local musicians
- A **free evening** to allow for informal networking or exploring the local community

Beverage Breaks and Meals

You should provide breaks during mid-morning and mid-afternoon; these can be informal if they occur during the middle of a work session. Lunches can be either sit-down or working affairs; the latter is beneficial if you do not want to break the flow of the work going on. For instance, in one workshop, teams dove into their action plans at 11 a.m. Rather than have them break for lunch an hour or so later, the steering team decided that participants would pick up box lunches at 11 a.m., then work through the lunch period. This uninterrupted period kept teams together and focused and allowed for an earlier workshop adjournment. It is best if the steering team provides lunch on site to avoid having participants leave the facility, which can result in delays and loss of continuity. If the budget does not cover this expense, participants can be asked to pay for their lunches to recoup costs. If it is necessary for participants to procure lunch on their own, you may want to consider a 1½-hour lunch period rather than an hour to ensure that they can return on time and keep the program on schedule.

Case Studies

Case studies can provide real-life examples to illustrate workshop discussions. The consortium partners have produced two case study videos of relevant success stories for use in courses and workshops: "Protecting Paradise: The Sanibel Island Story," involving the J.N. "Ding" Darling National Wildlife Refuge; and "Road to Tranquility: The Zion National Park and Springdale, Utah, Story." The consortium liaison can provide more information on these videos and other future productions.

No doubt there are good success stories in your region that can provide inspiration and insight to teams struggling with similar issues. In brainstorming **case studies in your region**, think especially of examples that illustrate effective partnerships. You can ask someone who has been involved to make the presentation (either during a specific module or an evening session), invite a panel of partners who can describe the different components or viewpoints involved in the project, or work with a module instructor to incorporate the case study.

Borrowing from previous workshops and courses, you could:

- **Use a case study as the focus of a module**
  Because the modules can be up to 2½ hours in length, there is adequate time to examine a case study.
- **Organize an evening reception around a case study presentation**
  One steering team included the potential for a local case study in the criteria for deciding workshop location. Once the decision was made, the steering team invited the local community to provide an evening presentation.
- **Plan a field trip around a local case study**
  Again, this involves holding the workshop in an area with case study potential. Be aware, if this idea appeals to you, that a field trip can be time-consuming and changes the learning dynamic. If you want to include a field trip, think carefully about the timing and how it fits into the rest of the agenda. If the host community provides a pertinent case study,

especially of local community–public land collaboration, bringing local residents into an evening session (see above) may well be less disruptive to the workshop flow.

Daily Opening and Closing Sessions
Schedule time at the beginning and end of each day for general remarks and announcements (e.g., personal messages, hotel or transportation information). This time is also important for continuity and flow. Allowing 15 minutes each morning is usually sufficient for participants to get into a learning mindset or to recap the previous day's work and link it with what is to come. At the end of the day, a wrap-up activity can help the group come to closure on the preceding activities and begin to prepare mentally for the next day. It also allows an opportunity to get feedback from participants on how the day has gone. To include both wrap-up and feedback, you will need to allot up to 30 minutes.

Evaluation
You will need 30 minutes near the end of the workshop to allow time for participants to fill out an evaluation form. You may also choose to conduct an oral evaluation at some point in the workshop (middle to end), to provide an opportunity for participants to openly share feedback. One method frequently used is a "plus/delta" exercise, where participants share what worked well for them throughout the workshop (plus), and those things that could be improved upon (delta, or "change"). See page 13.6 for more discussion on evaluation. See appendix G for a sample written evaluation form.

Closing Activities

Allow 30–45 minutes for closing activities. In one often-used technique, participants write down on a sheet of paper one action they will take within the first month after the workshop. Then each person folds the sheet into a paper airplane and sails it across the room to another participant, who is responsible for calling a month later to see if the action was indeed taken.

Allow time, too, to go around the room and ask each participant to describe an "aha" that came to them as a result of the workshop, or to share what they are taking back with them as an unanticipated personal workshop outcome. Ask several people to take notes during these "testimonials," as inevitably there are some real gems.

INSTRUCTORS

You can be compiling a list of potential instructors as you choose modules and develop the agenda content. As you put together your list, consider the balance of perspectives you want in your presenters, as well as such things as gender and ethnic mix. See chapter 10 for more discussion on instructor selection.

Although you may want to consider a keynote speaker, it is less important when following a course format than it is with a conference format (see the discussion in chapter 3). Time slots that would be suitable for a keynote include a kick-off to the workshop, a lunch or dinner presentation, or perhaps the regional overview. A good keynoter needs to be a dynamic speaker with some name recognition and acknowledged experience on the issues you will be examining.

WORKSHOP FACILITATION

A skilled workshop facilitator or facilitation team is essential to keep things running smoothly, stimulate participant interaction, and help clarify the many interconnecting threads of the workshop. He or she can also advise on general workshop flow and activities and help fine-tune the agenda to achieve your workshop goals.

Brainstorm potential facilitators in a steering team meeting. An effective facilitator knows how to put bias aside, conveys an objective but detached presence throughout the workshop, and is perceived as fair and able to represent all points of view. This sense of neutrality and openness to all perspectives can be critical to the success of the workshop. As often these characteristics are better provided by someone unconnected to the area or the sponsor groups, our recommendation is that the facilitator not be someone from your steering team.

You may want to develop a one-page description of the workshop to send to potential facilitators, either as a formal request for proposals or an informal "talking points" document. Unless the steering team is in agreement on your top choice, you may want to interview several facilitators. Be prepared to discuss your budget limit for fees, travel reimbursement, and other pertinent expenses. Professional facilitators frequently include pre-meeting consultations in their fees, but you should check on this. You also may want to include the facilitator in the debriefing session (see page 14.1), as they can often provide good insights into the dynamics of the group and help the steering team with follow up strategies. You may need to draw up a contractual letter that outlines your understanding about the facilitator's time and involvement beyond the workshop itself.

OTHER CONSIDERATIONS

Other factors that can affect the agenda and the overall success of the workshop include matching the workshop content to participant skills and experience, general content balance, and terminology.

Matching Workshop Content with Participant Skills and Experience

Knowing the audience you are targeting and what you are seeking in participant experience helps you to focus the information presented so that it is most useful. You do not want to deliver information that is too basic, nor do you want it to go too far beyond what the participants understand or are ready for. There are several ways to help ensure that the content matches the experience of the community teams and presents them with the right challenge. First, in thinking about the target audience, it might be helpful for the steering team to think about "community learning curves" in terms of local issues and experience with cross-sector collaboration. (For more details, see the discussions in chapter 4 on readiness and in chapter 8 on target audience.) The important consideration is to understand the audience you are targeting as you develop the workshop agenda, and then pass this information along to your instructors.

As you move into the phases of workshop marketing and participant team selection, there are additional ways to help ensure a match between workshop content and team experience. You can frame the workshop announcement in a way that appeals to your target audience. (This is discussed more in chapter 11.) You can include a question in the application that asks potential participants to describe their relevant community activities, which should elicit information regarding experience and skills that will help in selecting teams. After team selection, you could acquire more specific information through a background survey that can help with a final tweaking of the workshop agenda. See page 12.2 for further discussion on a survey.

General Content Balance and Terminology

As you develop the agenda, remember the title of the national course: "Balancing Nature and Commerce in Communities That Neighbor Public Lands." The partner consortium offerings are about community sustainability and economic initiatives that respect community character and ecological integrity. See the discussion on instructor selection (page 10.1) for more on this subject.

To attract local officials and members of the business sector to your workshop, your agenda will need to "speak" to them. In cross-sector work, it is always helpful to be aware of the language we use. To provide a more level playing field, steer clear of jargon and acronyms, and use words that are commonly understood. Since the workshop teams may include people new to a "conservation mindset," you want them to feel as welcome as possible, and using accessible language helps. In addition, you can reach a broader constituency by avoiding terms that raise red flags or have certain connections (rightly or wrongly) to a perceived point of view.

Preparing for Follow-up
During the final action planning segment, have each team identify at least one member who will write up the team's action plan and send an electronic version to the consortium liaison or another member of the steering team. This helps to document an important outcome of the workshop and provides a reference point for assessing follow-up needs and success. It can also provide a platform for future community collaboration.

CHECKLIST

- ❒ Decide whether to use a "training" or "conference" format
- ❒ Select existing course modules that will help meet your workshop goals
- ❒ Review module learning objectives and talking points to determine the degree of tailoring needed to address your regional situation
- ❒ Decide whether you need any additional workshop content to meet regional needs
- ❒ Construct a detailed workshop agenda, including the sequencing of modules, evening activities, welcome and introductions, evaluation, closing, etc.
- ❒ Identify a partner who will produce the regional wall map
- ❒ Consider potential local case studies and how they could be included
- ❒ Discuss the general make-up and desired range of experience of participating teams
- ❒ Identify a workshop facilitator and prepare a contract letter; review and tweak the agenda with the facilitator
- ❒ Compile and prioritize a list of potential instructors, considering the overall balance in the prioritization process

NOTES

Chapter 10

Selecting Instructors and Coordinating on Developing Workshop Content and Materials

The instructor selection process essentially begins as you develop the workshop agenda. The agenda discussions will undoubtedly bring to mind people who potentially could be workshop instructors on certain topics. This chapter covers instructor selection (including decisions regarding instructor expenses), and coordinating with the instructors as you develop the workshop content and notebook.

INSTRUCTOR SELECTION

As you choose modules and develop the agenda, you should also begin compiling a list of potential instructors. Along with experienced people from your region, some instructors who helped develop the national course may be available to participate in your workshop. (Your consortium liaison can assist with this.) All instructors should be familiar with and experienced in interactive learning techniques.

As you put together your list, talk about the balance you want in your presenters, as that balance conveys a message. Consider such things as the overall diversity of perspectives that are represented, gender balance, ethnic mix, etc. If a goal of the workshop is to have teams that represent a cross-section of the community, it is important that the content and the instructor perspective reflect a balance between environmental concerns and economic interests. Look for potential presenters who are well respected and who understand that a healthy environment and a healthy economy are both essential to a vibrant community. Check around to see if anyone on the steering team or someone else you know has seen the proposed presenter speak in front of a group. Sometimes a person who is very knowledgeable on a particular topic is not necessarily the best speaker. A dynamic speaker can help to energize a crowd and liven up the learning process.

The entire steering team should participate in selecting instructors if possible. You should plan on allocating an entire meeting to discussing potential instructors and making decisions on whom to invite and who will do the inviting. Identify first and second choices; this way you will have backup names and those doing the asking will not have to come back to the steering team if the first choice is unavailable.

Before extending invitations to the top choices, the steering team should discuss the policy on **covering instructor expenses**. At a minimum, instructors are usually offered meals and overnight lodging for the duration of their participation in the workshop. Depending on the availability of instructors and funding, you may want to invite them to participate in the full workshop. This will allow them to understand how their presentations fit into a larger context and make possible their input in broader group discussions. If you have any on-your-own meals, you might consider a stipend to instructors to cover those costs. In addition, you will need to provide reimbursement for travel costs and possibly honoraria. It is very important to settle these questions in advance. Although it is preferable for instructors to donate their time, some may have speaking fees they charge on top of travel and room and board. Discuss these issues and that of budget flexibility among the steering team before extending official invitations.

You need to decide what **workshop information** you will provide to potential instructors. At a minimum, consider sending them an agenda that lists (a) the overall workshop goals and (b) the learning objectives and speaking points for the modules. For some sessions, lesson plans may be available to help potential instructors better understand how the material has been presented in the past. You might also want to prepare a brief description of the workshop approach (see chapter 3). Maintain a master list of who has been asked (and by whom) and, as you receive it, confirmation of their participation.

COORDINATING WITH WORKSHOP INSTRUCTORS ON CONTENT

Much of your regional workshop can be based on content and presentations that have been developed for previous workshops and courses. You may want to modify this material to better fit the specific issues in your region. Using the approach developed by the partner consortium (described in chapter 3), the instructors become partners with the steering team in making these modifications. This means that they will present the material in a way that helps to meet the learning objectives agreed on by the steering team. To accomplish this, you will need to have a **phone conference** with each instructor at least four weeks prior to the workshop to discuss the content of his or her presentation. At that time you should also review the workshop agenda so that the instructor understands the broader context for the session and avoids presenting material that is covered elsewhere. Although the consortium liaison will arrange for and facilitate this phone call, it is helpful to have one or two steering team members involved as well. The phone call will provide an opportunity to discuss:

- The overall goals for the workshop, the general content and learning objectives for the session in question, and how the issues and problems explored in the workshop play out in the region
- Group activities and interaction methods for the session
- The total time allotted for the session and the desired balance between presentation time and group interaction (in general, participants prefer relatively short, focused presentations illustrated with examples and followed by sufficient time for discussion)
- Instructor recommendations for information and resources (such as articles and/or a reading list) to be included in the participant notebook
- Information you will need from them, including (a) audiovisual needs for their presentations, (b) a brief biography, and (c) a photograph for inclusion in the participant notebook

When it becomes available, you should send instructors information on participant teams (e.g., team makeup and history and any background that relates to participant experience), as it helps them to tailor their remarks to the specific audience. Instructors frequently share their thoughts or speaking outlines as they are developing their presentations. Ask them to prepare their talks enough in advance so that their outlines or PowerPoint programs can be included in the workshop notebook (see the next topic). Alternatively, they should bring to the workshop sufficient hard copies of their presentations, three-hole punched, to supply all participants.

Participants benefit if instructors are present for more than just their specific sessions. This allows opportunities to respond to participants' questions during other portions of the workshop and adds a sense of continuity and integration to the workshop.

If you will be developing a **local case study**, you will need to prepare learning objectives and speaking points in conjunction with the presenters to ensure that the important lessons emerge from the story. See page 9.8 for additional discussion on case studies.

WORKSHOP NOTEBOOK

Each workshop participant will receive a comprehensive three-ring notebook binder that contains the following information about each module:

- learning objectives
- overview of session content

- team activity instructions or descriptions (if applicable)
- other supporting materials and readings

The notebook will also include brief biographies and photographs of the instructors and other presenters, information on participant teams, and workshop sponsor information. It is important to **convey to instructors the deadlines** for receiving these materials as far in advance as possible to ensure timely completion of the notebook. The consortium liaison will be responsible for final production of the notebook.

CHECKLIST

❒ Determine your policy regarding instructor expenses

❒ Decide what workshop information will be sent to invited instructors

❒ Working from the prioritized list, extend invitations to potential instructors along with workshop information

❒ When available, send information on selected teams to confirmed instructors

❒ Hold a phone conference with each instructor (including any presenters of a local case study) to review workshop goals, module learning objectives, and talking points and to discuss the instructor's presentation

❒ Obtain the following information from each instructor:

- audiovisual needs
- instructor biography
- outline or PowerPoint display of presentation
- information and resources they would like included in the participant notebook
- travel arrangement information

NOTES

Chapter 11

Marketing the Workshop

To reach communities that can most benefit from the regional workshop, the steering team needs to (a) develop team selection criteria that help ensure the desired audience; (b) prepare a workshop announcement and application that includes the criteria for selecting teams; and (c) develop and implement a marketing and team-building strategy. The steering team will have discussed the target audience at its kick-off meeting and in the early stages of agenda development, but as the time approaches for outreach and promotion of the workshop you should revisit the topic. (See page 8.1 for discussion prompts.) Reviewing your target audience and the desired level of community readiness will add clarity to your outreach and marketing efforts and will aid you in developing criteria for selecting participant teams. The process of team selection is covered in chapter 12.

Criteria for Selecting Teams

Selection criteria are helpful to applicants as well as the steering team. The questions that you considered in chapter 8 in thinking about the target audience can also help guide you in formulating team selection criteria. Some possible considerations include:

- desired balance, cross-sector representation, and team size (ideally 5–7 members)
- some demonstrated level of community collaboration
- some indication of support from local officials (if no official is on the team)
- some semblance of common goals or vision by team members
- participation of a public land manager on the team
- an understanding of common community–public land issues

Workshop Announcement and Application

Once you have settled on a place and date for the workshop, you can draft a workshop announcement and design the application process. Although you do not need to have a detailed agenda worked out, you must be far enough along to provide some substantive information on content. A **workshop announcement** can include the following:

- A brief overview of the workshop, including a concise description of the common issues shared by communities and adjacent public lands
- Key subjects the workshop will cover
- The list of people who have agreed to serve as instructors, if you have received this commitment

- A brief explanation of the workshop's participatory, team-based approach
- The criteria that will be used to select teams
- The workshop dates and location
- Lodging information including deadline
- Information on workshop costs for participant teams and the scholarship policy, if applicable
- The application process and deadline
- Contact information for those who have questions
- The list of workshop sponsors

You will need to give special thought to the **application process**. The application is an invaluable tool for gaining information that will help in selecting teams. Asking applicants to answer open-ended questions is one way to learn about the particular issues with which communities have been grappling, as well as what they have done so far and what they would like to work on. This information can help you assess the readiness factor (with regard to issues) of the applicant teams, and it can also help with final tweaking of the agenda. You should ask questions about the history of collaboration in their community to help you assess their partnership experience and the "fit" between their issues and those that will be addressed in the workshop. Finally, you should explain your objectives regarding team diversity (i.e., cross-sector representation, community official, public land manager, gender balance). Asking them to list their team members helps them take a step toward cross-sector collaboration if they have not yet done so.

There is a direct connection between your selection criteria, your application questions, and the participant audience you actually achieve. In framing the application questions, make sure that you use the criteria you have developed to reach the audience you have targeted.

Finally, you should set your **application deadline** earlier than you actually need the applications so you can conduct additional targeted outreach if you do not receive the desired number of applications or the quality of the teams is not up to par.

For sample workshop announcements and applications, see appendix H.

MARKETING STRATEGY

The workshop steering team will need to develop and implement a proactive strategy for distributing general information about the workshop, as well as the workshop announcement and application materials. The strategy should include specific people, organizations, and community-based networks that can get word to your target audience as well as more general means of delivering information (e.g., newsletters, websites, or email). A quick brainstorm among the steering team should elicit a good list. Do not forget to get commitments as to who will do what, and identify an application deadline approximately 4–6 weeks prior to workshop delivery. You might also consider a contingency plan for proactive recruitment (including phone calls or other personal contact by steering team members) if you are not getting the desired response in either numbers or quality of community teams.

Some steering teams have found it helpful to identify a "team builder" who actively promotes the workshop and meets with key leaders in the region to generate buy-in for the project. If certain steering team partners are actively involved in specific target communities, you may decide to assign them to these areas to help leaders create their teams, ensuring that key stakeholders are informed and engaged as much as possible. Another strategy that may help to get the word out about the workshop is to hold "information sessions" throughout the region that provide a brief overview of the project elements, partners, and anticipated outcomes.

Whichever method you choose, it is important to **promote the workshop actively** and get information to prospective communities as early as possible. You may want to consider the "rule of three": studies have shown that often people do not take seriously a community-led event or meeting unless the information crosses their paths in three different ways. And don't forget—there is no substitute for one-on-one conversations and phone calls!

We recommend that steering teams use this workshop as a forum to engage *new* partners in the discussion about balancing conservation and development interests, rather than just recruiting "the choir" of people who are already involved in such efforts.

CHECKLIST

- ❐ Refresh steering team understanding of the target audience and desired level of community readiness
- ❐ Determine the selection process and criteria
- ❐ Prepare the workshop brochure and application materials
- ❐ Develop the marketing strategy for getting information out; include follow-up tasks in case initial response is low
- ❐ Assign responsibilities for marketing and recruitment

NOTES

Chapter 12

Participant Teams

Although team selection occurs in the later stages of workshop organizing, the groundwork for team selection is laid earlier with decisions on target audience and selection criteria. This chapter covers team size and make-up, team selection and notification, team "homework," communication with teams, and the scholarship policy.

TEAM SIZE AND MAKE-UP

Ideally, teams should have five to seven participants. This size ensures better cross-sector representation and increases the likelihood of more lasting local commitment to carrying out partnership initiatives. We have found that having on the team a public land manager (or someone on his or her staff) who is committed to partnerships is a key factor for successful follow-up. Keep an eye out for gender balance also, as it affects team dynamics.

TEAM SELECTION AND NOTIFICATION

With good marketing and outreach (see chapter 11) and proactive recruitment if necessary, you should receive a good selection of applications from which to choose. Aim to have a process in place for team selection and notification well before your application deadline.

Selection Process

The steering team should decide who is responsible for accepting the applications and assembling them in a format for consideration. One option is for one or more people to review the applications and rank the teams against the selection criteria; this ranking can then be discussed by the entire steering team.

Some possible factors to consider when reviewing the applications include:

- Does the team show the desired balance and cross-sector makeup?
- Has it met the selection criteria?
- Does the team demonstrate "readiness," e.g., an understanding of regional issues and/or a willingness to work together?
- Do the concerns of the team have relevance for other communities?
- Do the needs and goals of the team match up well with the workshop content and goals?
- Do the teams as a whole represent the overall geographic range we are looking for?

Notification of Teams That Are Selected

When you send notification to the teams that they were selected, you should outline the things that need to happen between now and the workshop. You will want to be in touch on such things as lodging (including the reservation deadlines and cancellation policy), meal preferences (including food sensitivities), scholarship policy (see discussion below), and registration deadlines if applicable. You may want to let them know when to expect this information or, alternatively, you can include it with the notification mailing. For meal preferences, you should include a form for them to return so that you can factor this information into your food choices.

Notification of Teams That Are Not Selected

You should give careful consideration to what you say to those teams not selected, since they may have put considerable effort into preparing their applications. For instance, if you are already thinking of follow-up activities (such as holding another workshop next year or offering a technical assistance phase), you might want to mention that you anticipate other possibilities for their involvement. If you are holding a keynote presentation or social event that is open to the community, you might also invite them to attend.

ADVANCE WORK ("HOMEWORK") FOR TEAMS

We have found that encouraging team members to meet prior to attending the workshop helps to initiate the team-building process even before the workshop begins. An advance meeting is especially helpful when team members have not previously worked together. It provides an opportunity for them to discuss why each person has decided to participate and what they are hoping to achieve, what they perceive as the key issues and opportunities, and how they would like to continue the process after the workshop. (See a sample homework sheet in appendix I.) If you anticipate asking teams to get together before the workshop, it will be important to notify them to that effect when they are selected to give them adequate time to schedule this meeting. It is highly recommended that this be an in-person meeting and not a conference call.

PRE-WORKSHOP MATERIALS

Pre-workshop information that you may want to send to participating teams includes a background survey and a pre-workshop packet.

Participant Background Survey

Some workshop organizers have sent participant teams a survey to fill out and return in order to get a better picture of their regional challenges and the experience levels and interests of individual team members. If you choose to do this, you should send the survey with the notice of team selection to have the information available for planning purposes. This information can be particularly helpful during final tweaking of the agenda and can be shared with workshop instructors to enable them to tailor their presentations to their specific audiences. Alternatively, you could structure your application questions carefully to elicit similar information.

Pre-workshop Packet
Your pre-workshop packet, which should be sent to participants two to three weeks in advance, should generally include the following:

- agenda
- syllabus of recommended reading
- any final lodging information and a reminder of the cancellation policy
- directions to the workshop location
- any final information about conference expenses
- list of participating teams and their locations
- list of presenters

SCHOLARSHIPS

Scholarship policy differs from workshop to workshop depending on available funds, but most workshop organizers offer some level of assistance to offset participant costs. For example, at one workshop the organizers felt strongly that everyone should make some financial commitment, so they asked participants to pay a registration fee and cover their travel costs, while the organizers covered all lodging and meal expenses out of the workshop budget. At another workshop there was no registration fee; participants paid their own travel and everything else was covered out of the workshop budget. What you offer in the way of assistance will ultimately depend on the overall costs, what you can negotiate with the workshop facility, and your success with fundraising.

CHECKLIST

❒ Develop a policy on team size and make-up

❒ Agree on a process for team selection and notification, and who will be responsible for what

❒ Establish your scholarship policy

❒ Decide how to handle notification of teams not selected

❒ Determine what materials will be sent to participants, the content of the mailing(s), the deadline(s), and who is responsible

NOTES

Chapter 13

Logistics, Logistics, Logistics…

By paying careful attention to logistics, you will help ensure a smoothly functioning workshop environment in which participants focus on the content and learning rather than on what is happening around them. Important logistical tasks include deciding where to hold the workshop, coordinating with the host facility, and completing the many arrangements that lead to success. In this chapter we cover (a) assigning lead responsibility for logistics, (b) selecting the workshop site, (c) visiting the site, (d) coordinating with a local contact, (e) making conference facility and contractual arrangements, (f) producing the final workshop materials and handouts, (g) final room set-up and pre-workshop steering team meeting, (h) assembling workshop supplies, (i) staffing check-in and registration, (j) settling outstanding expenses, and (k) troubleshooting and ensuring a smoothly flowing workshop.

Assigning Lead Responsibility for Logistics

In order to ensure delivery of a smoothly running workshop, the workshop steering team should assign someone to be responsible for logistical details. A steering team member may have staff associated with his or her organization who can assist with the work, or you may want to engage an intern to handle some of the tasks, especially in the last six to eight weeks leading up to the workshop. Even with an intern or other staff assisting with details, however, someone from the steering team needs to be responsible and available for feedback, and be communicating directly with the many groups involved in logistics.

Selecting the Workshop Site

Organizers of previous workshops have considered facilities ranging from training centers to hotels with conference facilities to colleges. The steering team may want to assign a subgroup to investigate potential locations for consideration by the entire team. There are various factors to consider in selecting a location that relate to the facility itself as well as the community. These may include:

- suitability of the facility to handle your meeting space needs
- the ability to negotiate a favorable package cost
- centralized location
- access nearby to lodging, restaurants, and social gathering places
- access to airports for national instructors who may participate as instructors

Suitability of the Meeting Facilities
Regarding the potential **host facility**, is it conveniently located and does it have a meeting room of appropriate size as well as break-out rooms for team activities? Meeting space is very important, as you will be using these rooms for up to three days. Size, layout, aesthetics, and convenience all play an important role in the success of the workshop. Ideally, you should visit the facilities you are considering prior to making your decision, but that may not be possible. Review the site visit discussion (see below) as you consider where to hold the workshop. You may have to depend upon the facility staff, a diagram of meeting rooms, or a local person for your information, so clarify your space needs prior to these conversations.

Negotiating a Favorable Package Cost
The package cost at hotels that host conferences usually includes meeting rooms, lodging, and food. You can often negotiate a reasonable package if you can guarantee a certain number of lodging rooms or schedule the workshop in an off-season when business is slower. A hotel may decrease or eliminate the charge for meeting space with guaranteed lodging. Some colleges may have good off-season rates for food and lodging, especially compared with a conference facility.

Considerations Related to the Local Community
Some possible considerations include:

- Is there a local organization that might co-sponsor the workshop or help with local logistics, such as scoping out a possible workshop facility?
- Is there potential for a local case study?
- Does the community have an interesting story to tell that illustrates community–public land relationships? If so, you could involve local residents in an evening presentation or field trip.
- Are there potential funding sources in the community?

Your final decision on where to hold the workshop will most likely depend on the following factors:

- suitable meeting space, including team break-out rooms
- quality of lodging and food services
- location and accessibility (e.g., easily accessible to the target audience, an attractive setting that allows participants to take a walk)
- availability of the facility and tentative cost

VISITING THE SITE

The facility where you will hold the workshop will probably require a contract to reserve the meeting rooms and outline the services and responsibilities it will provide. The contract will include deadlines for reserving a block of rooms, selecting food choices, and payment. Prior to committing yourselves to any of these details, several steering team members should visit the facility to look at the meeting space and meet with the facility's conference coordinator. You will need to consider the main meeting room, break-out rooms for team meetings, easels and flip charts, audiovisual equipment and facilities, lodging rooms, food services, and administrative services.

The Main Meeting Room

You will need a main meeting room large enough to hold the entire group comfortably, which with participants, steering team, instructors, and observers will be 40–55 people. On the other hand, you do not want a room so large that the group feels "lost." You will be using this room for up to three days, so think about room aesthetics and convenience. What is the lighting situation? Are there windows? What are the acoustics and what is the set-up for audiovisual equipment? (You may need both a PowerPoint projector and a slide projector.) Is a sound system needed (which may add to the cost)? Where will food and beverages be located during breaks? How close are the break-out rooms? Is there space for a handout table or for people to set up exhibits either in the main meeting room or nearby?

You will need space for each team to have a table, preferably round. Each participant will receive a large, three-ring, workshop notebook, so the table should be able to accommodate six or seven people and their notebooks. We have found that it is better to have a room set-up that is shallow and wide, rather than narrow and deep, as it allows the facilitator to interact more easily with all the teams. You will probably need two tables at the back (these can be rectangular) and some extra chairs for instructors, steering team members, and observers.

Break-out Rooms

Each team will need a break-out room to serve as its work space, so you will want to reserve these rooms for the duration of the workshop. Maintaining this space will enable the team to post maps and flip charts around the room without needing to move materials or switch rooms during the workshop. At times you may want all participants to circulate as a group through the break-out spaces to review maps and other products of the team activities. (The alternative, which is less time-efficient, is for teams to bring their maps and flip charts to the main meeting room for reporting.) Consider how many teams you want and then assess the suggested break-out rooms for their suitability. Is there space for the teams to tape maps and flip-chart notes on the wall? How far are the rooms from the main meeting space? Is there standing room for the entire group?

Easels and Flip Charts
You will need three easels and flip charts for the main room and one of each for each break-out room. Ask what the conference facility charges for these, as you may find it is significantly cheaper for you to bring your own.

Lodging Rooms and Amenities
You may want to look at the lodging rooms that will be reserved for workshop participants, presenters, and the steering team. Consider their convenience to the meeting space. Organizing shuttles to bring participants back and forth between the hotel and meeting space can be cumbersome, so you may want to make sure that lodging options are within easy walking distance of the meeting rooms. You may want to reserve a block of double-occupancy rooms where team members can partner up to minimize expenses. Ask about amenities available to overnight guests, e.g., swimming pool, gym facilities, or walking trails. Are there spaces on-site or close by where participants could gather socially?

Food Services
Regarding food selections, ask about menus and food service options. Be sure to calculate total food costs, including breaks. Food costs mount up very quickly, but food is also an important component of the meeting. In pre-selecting food items, such as sandwich or dinner entree choices, remember to accommodate vegetarian and other dietary needs. Although most conference facilities provide a good selection of vegetarian items, be sure to inquire if you do not see many items in this category. If you will be asking participants to cover their meal costs, be price-conscious when selecting food options. Have pre-printed receipts available for participants who will submit receipts to their organization. If you are holding the workshop in a setting without food preparation capacity, ask about caterers with reasonably priced services.

Also discuss where the meals will take place and the type of service. Will the meals be buffet or sit-down? Are box lunches available? You may want to consider keeping all lunches on site to avoid the lengthier lunches that result when participants leave the site to purchase food.

Administrative Services
Throughout the workshop, there will likely be times when administrative services are needed, e.g., access to copy machines and printers. Make sure you talk with the appropriate facility staff person to see if these services will be available, and if so, if there is an associated charge. Many times hotels and conference centers are willing to provide such services at no cost, but if they are not, copying costs can add up very quickly.

COORDINATING WITH A LOCAL CONTACT

If your site selection considerations included the presence of a local organization that could provide assistance, then chances are you have already talked with a local representative. If not, you might want to find someone who can be your person "on the ground." This individual can act as liaison with the conference facility (in which case have him or her participate in the site visit), or help plan an evening reception/program with local folks, put together a case study or field trip, or work with a local caterer, if that is how you are handling meals.

If you plan to open any of the workshop sessions to local residents (e.g., an evening presentation or a field trip), a local contact is critical to getting the word out to the community. Work with that person to develop a strategy, which could include a general mailing, a press release to area media, and notices in event calendars. If you choose to work with someone local, have a discussion early on about that person's responsibilities. Then a steering team member should check in periodically on follow-through. And remember, the more you can bring in local folks, the more the community will feel a part of the workshop and be interested in follow-up activities.

MAKING CONFERENCE FACILITY AND CONTRACTUAL ARRANGEMENTS

Conference facilities usually have **deadlines** built into the contract for both lodging and meals. When you sign the document you are bound by these deadlines. In the case of lodging, most facilities will hold a block of rooms until the date in the contract, but will not guarantee availability after that. Set your participant application deadline well in advance of the contract deadline so that

the teams selected will have time to make their arrangements. (It is not uncommon to have to send team members a reminder about the deadline for making reservations.) Don't forget to check with workshop instructors as to when they will be arriving and how long they are staying. Then the person responsible for logistics can make reservations for instructors as well as for steering team members, staff, and volunteers. You will want to ensure that you fill the number of lodging rooms agreed to in the contract. This is somewhat of a guessing game, so be conservative when estimating the number of rooms you think you will need. By negotiating a good room rate or covering lodging costs, you can avoid having participants book less expensive hotels.

There is usually a deadline by which you will have to provide menu selections, and also a deadline fairly close to the workshop date for providing a head count. Regarding this figure, you will be charged for the numbers you submit, so count carefully: team members, instructors, facilitator(s), steering team members, staff, volunteers, and observers.

You should also talk with the facility about **procedures for room reservations and check-in**. The simplest arrangement is to require workshop participants to reserve their own rooms, in which case check-in will be the responsibility of the facility. You might also want to track the people coming and turn their names over to the facility, and then check in periodically to monitor room reservations. This will allow you to send a reminder if necessary to the teams. If you are providing scholarships for room and board, make sure that arrangements are made with the hotel ahead of time so that those rooms are charged to the master account rather than to participants.

PRODUCING THE FINAL WORKSHOP MATERIALS AND HANDOUTS

In addition to information that is distributed prior to the workshop (discussed on page 12.3) and the workshop notebook (discussed on page 10.3), you will need to think about other materials you want to have available at the workshop, such as a master agenda for staff use, evaluation forms, and other miscellaneous materials.

Master Agenda for Staff Use
To ensure a smooth workshop flow, you should develop a detailed master agenda for staff use. In addition to providing particulars on specific presentations or instructors' arrival times, it should include the locations of the plenary sessions and break-out rooms, lists of supplies and audiovisual equipment needed for each session, the timing of beverage breaks, meal locations, and time allotments for "housekeeping" announcements. The master agenda should also include the names of individuals responsible for each of these details.

Evaluation Forms
Evaluation forms provide critical feedback to workshop organizers (the local steering team members as well as the consortium partners) and help you assess whether you have met your overall workshop goals and the objectives for the individual modules. The evaluation contributes useful information to the ongoing effort to make the workshop responsive to the needs of communities and public land managers. Appendix G contains a general evaluation form that allows participants to provide feedback on the workshop overall. If you want feedback on individual sessions or instructors, you can add another section to the evaluation to address that aspect. Previous workshops have also included activities designed to elicit verbal feedback. This is not a substitute for written evaluations, however; both are important.

Other Possible Materials for Participants

- last minute changes to participant list (include observers)
- final agenda (if there have been changes)
- additional resource materials
- list of organizations with displays
- miscellaneous hotel instructions
- list of local restaurants (if some meals are "on your own")
- sponsor information

CHECKING FINAL ROOM SET-UP AND HOLDING THE PRE-WORKSHOP STEERING TEAM MEETING

You will need to ensure that someone checks the meeting rooms to verify that the set-up and supplies specified in the contract are complete. This should happen either the evening before if the workshop begins in the morning, or early in the day if the workshop begins with an evening event. At this time you can make any last adjustments to table arrangements and place the workshop notebooks on the tables. You should also test the audiovisual equipment and load any PowerPoint presentations that have been provided ahead of time by instructors.

In most workshops, several steering team members and the consortium liaison take on the set-up tasks, which only take an hour or two of time. They then join with others from the steering team for a pre-workshop meeting over lunch or dinner, depending on when the workshop begins, to discuss any outstanding issues or changes. Often instructors who arrive early are encouraged to join the steering team and ask any final questions about the audience, facility, or other issues before the workshop begins.

ASSEMBLING WORKSHOP SUPPLIES

Among the supplies that you will need are name tags or badges, masking tape, and markers in all rooms, as well as table tents in the main meeting room. Make sure that you have some markers suitable for drawing on the large maps, and purchase a variety of colors. Don't forget easels and flip charts if you are not using what the conference facility provides. You may want to have some extra name tags on hand in the case of unexpected participants or observers.

STAFFING CHECK-IN AND REGISTRATION

When you confirm room check-in arrangements with the hotel, ask for a workshop registration area and table. Have someone staff the registration table who is able to answer questions related to check-in and workshop schedules and content. It is also handy to have a participant contact list at the registration table, so that you can ask registrants to review and update their information on check-in. Once everyone has arrived, the list can be updated as needed and distributed to participants before the close of the workshop.

SETTLING OUTSTANDING EXPENSES

You will need to establish a procedure for settling any outstanding expenses, such as agreed-upon travel payments, participant scholarships, or instructor honoraria, if applicable. You will already have communicated to both presenters and participants what workshop expenses they will be responsible for. If you are covering travel expenses, for instance, a remaining detail might be to request written travel vouchers from participants.

Most likely you will set up a master account with the hotel to cover staff and instructor lodging, workshop food expenses, and other items, so you will need to settle this account at some point as well. If your scholarship policy covers lodging and/or meals for participants, be sure to arrange for payment through the master account prior to the event. Giving the hotel a list of individuals covered by the master account should avoid confusion at checkout time.

TROUBLESHOOTING AND ENSURING A SMOOTHLY FLOWING WORKSHOP

Aside from careful attention to content, three things are critical to a successful workshop: good food, troubleshooting the inevitable logistical difficulties, and periodically assessing how things are going as the event proceeds. Food planning has been addressed earlier in this section.

Logistical problems inevitably pop up in any workshop or meeting. To keep the flow from being disrupted, designate a person—someone skilled at anticipating and dealing with difficulties—to be responsible for troubleshooting logistical snags. Although the master staff agenda discussed above is helpful as a checklist in this regard, there will undoubtedly be other questions that arise—from participants or presenters or the hotel—and someone needs to be charged with addressing these. You may want to talk with the hotel about having someone available to help out with technical glitches or site-related issues that may arise.

You should identify a time each day for key workshop staff to **assess how things are going**. These times should be included on your master agenda. Whether it is eating breakfast together or a quick 15-minute meeting at the end of each day, this provides an opportunity to check on how things are going contentwise and logistically and allows you to make modifications to smooth any rough spots. Be prepared also for a quick consultation if a decision is needed on short notice.

CHECKLIST

Early in the project:

- ❒ Assign lead responsibility for logistics
- ❒ Determine staffing for logistics
- ❒ Develop a process for evaluating and selecting the workshop facility that takes into account workshop space needs, lodging, and food service as well as location amenities
- ❒ Arrange for a site visit by one or more steering team members to work out details on set-up of the meeting rooms (including break-out rooms), availability of audiovisual equipment, and supplies
- ❒ Negotiate a contract with the facility

In the last weeks before the workshop:

- ❒ Arrange for staffing of the registration table
- ❒ Assemble the final workshop materials and aids, including:
  - o master agenda for staff use
  - o final agenda for participants
  - o evaluation forms
  - o miscellaneous hotel instructions
- ❒ Purchase or obtain any remaining supplies, such as name badges, table tents, easels, flip charts, masking tape, and markers
- ❒ Decide who will be responsible for meeting room set-up
- ❒ Decide staffing for the registration table
- ❒ Decide who will be responsible for troubleshooting

In the last 24 hours:

- ❒ Assess and complete the final meeting room set-up
- ❒ Test the audiovisual equipment
- ❒ Set up the registration table
- ❒ Implement the protocol for settling outstanding expenses
- ❒ Establish a troubleshooting strategy

NOTES

Chapter 14

Post-workshop Tasks

Tasks that need to be completed fairly soon after the workshop include sending thank-you notes, debriefing with the steering team, communicating with participants, and reporting to funders and sponsors.

SENDING THANK-YOU NOTES

Many people are responsible for a successful workshop, and it is important to thank them. Although any form of written thanks is acceptable, brief handwritten notes are especially nice. Among those to consider thanking are instructors, facilitators, people who provided assistance with case studies, steering team members, local sponsors, and in-kind contributors.

DEBRIEFING WITH THE STEERING TEAM

Schedule a meeting with the steering team within a few weeks of the workshop to discuss what went well and what could have been better. The consortium liaison will participate in this meeting in order to provide feedback for future regional workshops. The workshop facilitator should participate in this discussion as well, as his/her insights are usually very helpful to considering next steps. Although the consortium liaison and facilitator may participate by telephone, it would be best if the local steering team members attended in person.

You should copy and distribute the workshop evaluations to all steering team members in advance of this meeting. With the evaluations and agenda in hand, go through the agenda module by module and discuss how it went. It is important to talk about the regional tailoring of the workshop and whether it met your needs. If new modules were developed, did they accomplish your goals? What changes might you suggest? The debriefing should go beyond the agenda to address such issues as team selection, how well you matched team abilities with content, the appropriateness of case studies, and how well the conference facility suited your needs. The debriefing meeting also provides an opportunity to talk more concretely about follow-up and what the steering team wants to do next. (See chapter 15 for more on follow-up.)

POST-WORKSHOP COMMUNICATION WITH PARTICIPANTS

A post-workshop message informs participants that you appreciated their taking time to attend and that you have an interest in what they do following the workshop. It can also serve as a reminder to submit the team action plans if that task is still outstanding. Since this workshop is a regional initiative, you may want to consider compiling the team action plans and distributing them via CD to all participants to encourage cross-community collaboration on similar or related projects.

There may also be some information that you promised to participants during the workshop, such as an updated contact list, a resource list, or specific information related to follow-up initiatives. If all of this can be handled electronically, an email message is sufficient.

Reports to Funders and Sponsors

Many funders have official reporting requirements; this detail needs to be assigned to some member(s) of the steering team to fulfill. In addition, sending a quick note to update funders on the outcome of the workshop helps to build a good relationship for the future. Include any newspaper articles or other write-ups that demonstrate the interest in and benefits of the workshop.

CHECKLIST

- ❒ Send thank-you notes to those people who helped out with the workshop
- ❒ Hold a debriefing meeting with the steering team; distribute workshop evaluations to all steering team members prior to this meeting
- ❒ Send a post-workshop note or packet to workshop participants
- ❒ Distribute team action plans to workshop participants
- ❒ Prepare reports to funders when required; send a brief report on the workshop to all sponsors and any funders who do not require an official report

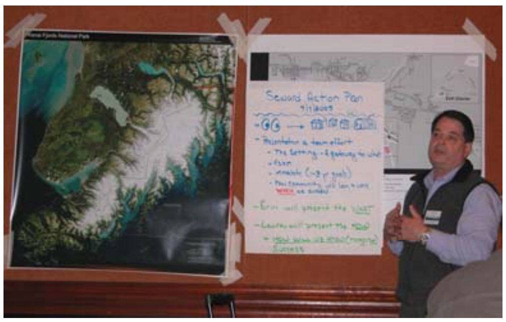
NOTES

Chapter 15

Follow-up to the Workshop

Although you may be focusing on just getting through the workshop itself, it is also important to anticipate and plan for follow-up. This section discusses follow-up planning, a meeting that brings teams together again at a later date, and resources that may be useful in developing follow-up activities.

Planning for Follow-up



Most teams that have been through a community–public land workshop are inspired and energized by the experience and eager to get to work on their action plans. You can help lay the groundwork for workshop follow-up as early as your kick-off steering team meeting. As you discuss the outcomes you want for the workshop, do some brainstorming as well about what follow-up might look like in your region and what you would need to make it happen. Some questions to help get you started might include:

Do you want to track the progress of the gateway teams after the workshop?

- Would you like to see ongoing networking among the teams or periodic gatherings of communities that have been through the training?
- What resources might the teams need as they move ahead with their action plans? Will they need technical assistance? Will they need additional training in leadership skills? If so, when should this capacity-building take place and what might it consist of?
- Do you think you might want to hold a second workshop in your region to introduce new communities to this work?
- Could communities that have been through the workshop become a mentoring force for other communities, with or without a second workshop?

Be realistic in doing this brainstorming. Focus on follow-up that is achievable with the partners you have assembled on your steering team. If in your brainstorming you realize that what you want to accomplish is dependent upon someone not currently on the steering team, get that person involved. People who are involved from the outset in helping to shape the workshop are more likely to be invested in what happens afterwards.

Talking about follow-up from the beginning has many benefits. It will help you see your workshop in a different light and perhaps even broaden your vision as to what is possible. It may even help you see opportunities that you would not necessarily have been open to if you were focusing only on the workshop. Talk over your ideas with your consortium liaison and find out what types of follow-up have happened elsewhere.

Do not forget to include in your fundraising efforts this broader vision of what might be possible beyond the workshop itself. Many foundations like to see this kind of thinking because it carries a greater potential for long-term impacts. You may even find foundations that are specifically interested in helping to meet follow-up needs, such as technical assistance or leadership training at the community level.

Be sure to include your vision for follow-up in the materials you send out when marketing the workshop.

Bringing the Teams Back Together at a Later Date

We find that workshop partners and regional teams want to get back together at a later date (six-twelve months after the workshop) for a one-day meeting. If you decide to do this, include it in your workshop budget and your fundraising. At this meeting the teams can provide each other with updates on their action plans, their partnerships, and challenges they have encountered. The meeting could also include (a) a speaker (who could be local) to provide inspiration and information pertinent to the workshop issues, or (b) a field trip that showcases an action plan success of one of the workshop teams. This type of gathering, with opportunities to share experiences and lessons learned with peers, provides important support to the teams and builds their capacity to address mutual concerns effectively at both community and regional levels. This meeting also provides an opportunity to discuss regional collaborative activities.

Resources

Each person attending the regional workshop will receive a course notebook that includes many resource ideas and listings. But the notebook is just a beginning of the assistance available to participants. There are many people in every state who can provide information or technical assistance as part of their jobs with various agencies and institutions. By spending a little time on the internet or talking with others, you can familiarize yourself with the specific agencies that can provide assistance in your region (e.g., the National Park Service Recreation, Trails, and Conservation Assistance Program; the Cooperative Extension Service, based at the land grant university in each state; state rural development councils; regional planning commissions). The publication *Opportunities for Communities That Neighbor Public Lands: A Guide to Federal Programs* (available online at http://www.nps.gov/csi/pub_resources/pub.htm), lists various types of assistance available through federal agencies. See appendix J for a listing of other resources.

Appendix A. Workshop Goals

Balancing Nature and Commerce in Gateway Communities of Western North Carolina

Workshop Goals and Objectives

- Identify the major issues influencing public lands and gateway communities in Western North Carolina
- Explain the benefits of protecting and enhancing the assets of gateway communities and public lands
- Identify the social, political, and economic characteristics of gateway communities/public lands and how they interact
- Initiate or strengthen gateway community/public land partnerships to build consensus for community action
- Help gateway communities/public lands identify their own natural, cultural, economic, and human assets, and develop strategies for how to protect and build upon these assets
- Introduce the visioning process and discuss how engaging citizens and other interest groups in community and public land planning can encourage stewardship and broad support of action strategies
- Provide opportunities for participants to work in teams and develop a plan of action to implement a collaborative project upon returning home

Appendix B. Master Work Plan and Timeline

Balancing Nature and Commerce in the Gateway Communities of the Lower Columbia River Valley Workshop

March 7-9, 2007

Task	By When	Who
Kick off meeting with all partners • Review and refine goals • Discuss workshop venue and dates • Discuss invitation process • Identify community team builders • Identify new sessions to be developed • Review national course agenda and identify sessions for February workshop • Review budget and discuss financial needs	**October 18, 2006 -**	**All**
Hold Project Information Meetings	October 19	All
Confirm national instructors		TCF
Develop invitation list / target audience	Mid – Late October	ST
Conduct site visits to potential facilities	Mid-Late Late October	DTP
Confirm workshop facility	Late October	DTP
Revise workshop goals (to be used in promotional materials)	Late October	TCF,DTP
Finalize TCF – DTP Contract	Early November	TCF, DTP
Identify additional funding strategies	Early November	TCF, DTP
Develop promotional materials for ST Review • Workshop announcement • Invitation letters (if appropriate) • Registration Form • Flyers	Early November	DTP/TCF
Draft outreach strategy (including media)	Mid November	All
Distribute final promotional materials	Mid November	DTP
Develop draft agenda with potential presenters	Mid November	TCF, CSI
Team builders actively working with community leaders	Mid November - February	ST
Identify maps needed for workshop and who will be responsible	Mid November	ST
Hold 2nd Steering Team Meeting	**Mid November**	**DTP**
Confirm local presenters	Late November	DTP
Develop goals for new session(s) and identify potential presenter(s)	Late November	TCF, CSI
Flesh out participant work sessions	Early December	TCF, CSI
Confirm facility and participant lodging options	Late November	DTP

Confirm NHA presenter(s)	Late November	CSI
Identify caterer(s) and get estimate of total costs	Late November	ST
Finalize all contracts (if necessary) with facilities and caterers	Early December	ST
Hold 3rd Steering Team Meeting	**Mid December**	**DTP**
Finalize workshop agenda	Mid December	TCF
Identify case study speakers (as appropriate)	Mid December	TCF
Draft invitation for community events	Mid December	DTP
Distribute invitations for community events.	Early January	ST
Confirm case study presenters (if applicable)	Early January	ST
Conduct prep calls with all presenters	January	TCF
Identify materials for participant packet	Late January	All
Hold 4th Steering Team Meeting	**Late January**	**DTP**
Finalize logistics (catering, A/V, set up) for community presentation	Late January	ST
Identify follow up activities	Late January	All
Finalize NHA module materials	Late January	CSI, TCF
Confirm all workshop logistics (A/V, catering, etc.)	Late January	ST
All participant materials due–Last day for instructors to submit notebook materials	Feb. 5	TCF
Application Deadline for Participants	Feb. 2	
Hold Steering Team Meeting to discuss community teams and participant applications	**Feb. 5**	**ALL**
Notify workshop teams and participants	February 7	ST
Finalize and write up instructions for participant work sessions	Early February	TCF, CSI
Notebooks submitted to production	Mid February	TCF
Draft evaluation materials	Mid February	TCF, CSI
Send participant materials	Feb. 23	ST
Hold Final Steering Team Meeting	**Late February**	**DTP**
RSVP deadline for community presentation	February 28	Local Partners
Notebooks shipped to Astoria, OR	March 2	TCF
Kristin and Delia arrive in OR	March 5	TCF,CSI
Key instructors arrive – Room Setup	March 6	All
Facilitation Training	March 6 pm	ST/Team leads
Deliver Workshop	March 6-9, 2007	All
Steering Team Debrief Meeting	Mid March	All

Appendix C. Workshop Agenda

Balancing Nature and Commerce
in Alaskan Gateway Communities

April 4-7, 2005 in Anchorage, Alaska

Workshop Agenda

Monday, April 4th

7:00 – 9:00 pm **OPEN EVENING SESSION**
Wilda Marston Theater at the Z.J. Loussac Library

The Dollars and Sense of Protecting Community Character

Marcia Blaszak, National Park Service
Ed McMahon, Urban Land Institute

Participants learn about the economic, social, and environmental benefits of protecting community character, and the value of open space and historic resources. They are introduced to major tools that can be used to protect community character, including education, voluntary initiatives, and other non-regulatory action, as well as alternatives to conventional residential and commercial development. The session addresses the challenges in preserving community character and ways to generate public support and the political will to use available tools. Examples are provided of what successful communities have done.

Tuesday, April 5th [1]

8:30 – 10:00 **Session 1: Welcome and Introductions**
Delia Clark, NPS Conservation Study Institute

10:00 – 10:15 *Break*

10:15 – 11:15 **Session 2: Introduction to Gateway Communities**
Kristin Peppel, The Conservation Fund
Jed Davis, Superintendent, Wrangell St. Elias National Park and Preserve

This session introduces the concept of "gateway community," and the significant factors influencing gateway communities and adjacent public lands. Instructors and participants explore major gateway issues and trends, the synergistic relationship between public lands and gateway communities, and the changing economic forces that influence rural areas and public lands. Participants gain an understanding of the benefits of protecting and enhancing the assets of gateway communities and public lands. Collaborative techniques and the use of non-traditional public participation will be introduced as tools for enhancing communication and building a common vision and goals.

11:15 – 12:15 **Session 3: The Economic Lay of the Land: Regional Overview of the Alaska Communities**
Odin Brudie, State Department of Commerce and Economic Development

This session provides an overall regional context, including background on public lands, development of gateway issues, and various trends that influence gateway factors (e.g., demographic, economic, social, recreational, tourism, etc.). The objective is to create a common understanding of the regional "playing field."

12:15 – 1:15 *Lunch*

1:15 – 3:15 **Session 4: Mapping Your Community** (Team Exercise)
Delia Clark, NPS Conservation Study Institute

This session introduces both visually and conceptually how public lands and gateway communities are interdependent. Participants learn a process for conducting a rapid assessment of gateway communities and adjacent public lands that identifies the physical, social, institutional, and economic elements influencing the public land/community relationship; the common issues of concern; and the institutions and individuals whose participation is needed to address these issues. In this session, participants will learn the mapping technique, a tool can be used with community groups. The maps produced in this session are revisited as the workshop progresses.

3:15 – 3:30 *Break*

3:30 – 4:45 **Session 5: Understanding Your Economy**
Ben Alexander, Sonoran Institute

In this session, participants will look at big picture changes in regional economies, setting the stage for the importance of understanding recent trends and current realities. A demonstration of EPS and EPSC as tools will be provided to help community teams to understand local economies, and introduce ideas about to use this information in partnership to advance gateway community goals. Customized EPS/C profiles will be distributed to teams and used to develop a shared understanding of local area socio-economics through a team exercise.

4:45 – 5:00 *Daily Wrap Up*

5:30 – 6:00 *Evening Social*

6:00 – 7:30 **Session 6: Sustainable Tourism**
Ed McMahon, Urban Land Institute

This session explains the role and effects of tourism on gateway communities and public lands, and presents methods to manage tourism to maximize its benefits while minimizing its negative impacts. Participants become conversant with the economic benefits and costs of tourism, the various types of tourism and tourists, and planning strategies that encourage repeat visits by tourists who pass through on their way to the attractions on public lands. They learn the principles of sustainable tourism, and how to apply them in their own communities. Numerous case studies illustrate the discussion.

<u>Wednesday, April 6th</u>

8:30 – 8:35 *Morning Announcements*

8:35 – 9:45 **Session 7: Finding your Comparative Advantage**
Ben Alexander, Sonoran Institute
This session will share the findings of the *Prosperity in the 21st Century* report findings, especially correlations related to economic opportunity and ideas on how to define success. Participants will be introduced to the idea of comparative advantage and framework for thinking about how to balance promotion and protection of area assets. Teams will begin identifying and developing their comparative advantage through a facilitated team exercise.

9:45 – 10:00 *Break*

10:00- 11:15 **Session 8: Strategic Planning for Land Conservation**
Mark Benedict, The Conservation Fund

Strategic conservation planning using an integrated landscape approach and provides a tool for gateway communities and their public land partners to work together for environmental and social benefits that are good for the public lands and the communities. This session introduces the need for and characteristics of strategic conservation planning. Participants will learn the principles and strategies of landscape level planning and design—an approach to strategic conservation planning that provides a framework that links land conservation to land-use decisions at the community, regional and statewide scales. Examples of community initiatives at various scales guide the discussion.

11:15 – 12:15 **Session 9: Land Conservation Tools and Strategies**
Brad Meiklejohn, The Conservation Fund
This session focuses on the role of land conservation in protecting and preserving community assets. The instructor will discuss some of the tools and techniques available to conserve land in Alaska, including land trusts and conservation easements. We will look at specific examples of how Alaskan communities have used these tools and techniques to protect special places. We will also examine the various funding sources and partnership opportunities that exist for land conservation in Alaska.

12:15 – 1:00 *Lunch*

1:00 – 2:15 **Session 10: Community Visioning**
Delia Clark, NPS Conservation Study Institute

Participants learn why visioning is important, how to present a compelling rationale for building a common vision for their gateway community, and what it contributes to a community when performed well. Participants gain an understanding of engaged community participation as the link between vision and stewardship. They learn how to design an effective community visioning-to-action process and, through case studies, see how this process can work successfully in real life.

2:15 – 2:30 *Break*

2:30 – 3:45 **Session 11: Measuring the Impacts of Growth and Development**
Mark Haggerty, Sonoran Institute

This session examines how public and private lands and community assets influence local growth patterns and economic development. Participants are introduced to tools that can help them measure the fiscal impact of development, including the build out scenarios and the Cost of Community Studies developed by the American Farmland Trust. Examples are provided of how these tools have been used by communities to address conservation and economic development challenges and to influence community attitudes.

3:30 – 5:00 **Session 12: Developing an Action Plan**
Delia Clark, NPS Conservation Study Institute

Using the tools and strategies presented during the workshop and with guidance from workshop instructors, each gateway team will produce a workable action plan for advancing their partnership over the next 6-12 months. The teams will describe their individual and collective responsibilities for advancing their partnership initiative. They will identify discrete objectives and determine the technical and/or financial resources needed to accomplish these objectives. They will also identify potential barriers to successful completion of the action plan and a strategy for overcoming these barriers. As a part of this exercise, they will decide on several specific, doable action steps to undertake upon returning home.

5:00- 5:15 *Daily Wrap Up*

7:00 - 9:00 pm **Optional Fun Evening**

<u>Thursday, April 7th</u>

8:30 – 8:35 *Morning Announcements*

8:35 – 9:50 **Session 13: Building Civic Engagement**
Delia Clark, NPS Conservation Study Institute

This session explores the benefits of citizen involvement in civic affairs and the principles of civic engagement. The group discusses the difficulties of putting the principles of civic engagement into practice and, in team activities, examines strategies for overcoming obstacles and distrust and gaining citizen collaboration in addressing community issues. Examples are provided of how community leaders and public land managers have built trust and partnerships within communities to effect change, including the use of place-based education and conservation initiatives.

9:50 – 12:00 **Team Work Time on Action Plans** *(includes am Break)*

12:00 – 12:30 Lunch with Invited Guests Begins

12:30 – 2:15 **Session 14: Building Long Term Partnerships**
Kristin Peppel, The Conservation Fund
Jim Stratton, National Parks Conservation Association
Deborah Williams, Alaska Conservation Fund
Tad Owens, Resource and Development Council

This session begins a resource panel of local organizations and agencies that will provide tools and information on community-based planning initiatives. Each panelist will give a brief overview of their program / institution and describe available tools that can support gateway community team initiatives.

12:30 – 1:30	Resource Panel
1:30 – 1:40	Break
1:40 – 2:15	Partnerships Presentation

2:15 – 2:30 Break

2:30 – 4:00 **Team Action Plan Report Outs**
Delia Clark, NPS Conservation Study Institute

4:00 – 5:00 Wrap Up and Evaluations

Appendix D. Instructions for Team Mapping Exercise

Session 4
Mapping Your Gateway Community

The purpose of this exercise is to help you develop a broad, systems perspective on gateway community issues. You may feel rushed, but the objective is not to be comprehensive, but rather to provide a forum for you to begin talking with other team members about your community and to begin to come to consensus on community assets and shared problems. Working as a team, you are to draw a map of your community and then identify the community's major assets. Feel free to use maps, aerial photographs, and other materials you have brought with you to help guide you as you complete the mapping task described below.

PART A: Mapping Your Community

1. Consider the questions: What is your community a gateway to? What is the main attraction? (There may be more than one.) Then, determine the scale of the area (community, region) to be covered and draw the outline of this area.
2. Add boundaries of public lands, municipalities, and other relevant jurisdictions.
3. What are the major routes people take when entering the community or to experience the attraction? Add principal arteries and circulation routes.
4. Add the principal natural and cultural features in your community, considering a range of perspectives.
5. What parts of the landscape create the first impression of your community? Mark entrances to the community and/or public land.
6. Where do visitors find commercial services, such as lodging and meals? Where do they park? Where are public restrooms and other conveniences located? Where is the basic infrastructure located, such as hospitals, sewage treatment plants, etc. Add key services, infrastructure, residential or business centers, etc.
7. Review overall map. Is it fairly complete? Add any missing features.

PART B: Identifying Community Assets and Priorities

1. Based on your map, make a list of key assets (physical, social, human, etc.) of your community.
2. Working from this list, identify the three (only **3**) assets that are of highest priority.

PART C: Identifying Community Issues and Concerns

1. Based on your map, make a list of key issues and concerns in your community.
2. Working from the list, identify the three (only 3) issues that are of highest priority.

PART D: Preparation for Report-outs

1. Choose one asset and one priority to share with the full group.

Appendix E. Team Instructions for Drafting Action Plans

Team Project

Drafting Action Plans

You will have two hours of planning time to prepare yourselves to launch the next steps of action toward enhancing your gateway community. You should use this time in the ways that your group feels are most important, but suggested options follow. You will most likely not have time to complete them all today, but completing these steps may be a good place to start as you continue your work at home.

1. Objectives: Review the list of assets you developed and based on these, develop a list of concrete, realistic, near-term objectives that you can work toward that will advance your partnership efforts. Choose one of these to focus on first for the rest of the afternoon.

2. Tools: Make a list of techniques and tools you've learned in this workshop that you might want to apply to your work on this objective.

3. Action Plan: Create a three-column chart, with the first column far bigger than the others. In the first column, list action steps to achieving your goal. In the second column list a time by which you will have completed it, and in the third column list the person or group responsible for getting it done.

1	2	3

4. Resources Needed: List resources needed to accomplish your goal (financial, technical, materials, human expertise, etc.) and list possible sources for each.

5. Stakeholders: Develop a broad list of possible stakeholders who might have an interest (even a small interest) in your work toward this objective. To do this, draw a three-column chart on a flip chart. In column 1 list specific names of actual organizations or individuals who might be potential stakeholders in accomplishing your objective (not just "churches" or "non-profits" but specific names and contact people if known). In column 2, write what you believe to be the primary focus or interest of that stakeholder (for example "quality after school programs" or "maintaining access for off-road vehicles"). In column 3, write an effective approach for each person or organization to pull them in or reinforce existing relationships (for example, "one-on-one meeting with the mayor" or "brochure focused on economic benefits" or "children's art show of future visions for community").

6. Obstacles and Solutions: Outline anticipated obstacles to accomplishing your project goal, and then brainstorm solutions.

7. Dash Board: List specific indicators you will look for to let you know whether you are moving along the right path and whether you are succeeding.

Regardless of how you choose to use your time…
allow enough time to prepare a five-minute presentation to the full group. This presentation should include:

WHY.............. Your team's big-picture vision, your goal, the way your region will look and work if you are successful

WHAT............The concrete, realistic, near-term objectives toward this vision you will work to accomplish when you go home

HOW..............*Who* will take responsibility for accomplishing these objectives?
When will you accomplish incremental action steps (a timeline)?
What resources do you need and how will you get them?

HOW WILL YOU KNOW .... that you are succeeding? What specific indicators of success will you look for?

Appendix F. Sample Action Plans

Preserving Community Character Workshop
February 10-13, 2004, UW-River Falls, WI

Somerset Team Action Steps
"There IS Life after the Workshop"

4-6 Objectives
1. Passage of newly revised St. Croix County land subdivision ordinance because it includes conservation design.
2. Providing broader base of community support for preserving community character by developing leadership skills and increasing community involvement.
3. Renovation/preservation of historic Town Hall in Village of Somerset. Upcoming 150th Anniversary (1856-2006) for Village, Town and St. Anne's Catholic Church coordinates well with this project.
4. Formation of "Friends" group for the Apple River in St. Croix County. Friends group already formed in Polk County.
5. Building trails – educational.
6. Scenic Byway designation for the road passing Somerset Landing on the St. Croix.

Local Project for Immediate Action = Passage of Conservation Design Ordinance

I. Stakeholders
- A. Town Boards
- B. Town Planning Commissions
- C. "Take Back Wisconsin"
- D. Developers and builders
- E. Surveyors and engineers.

II. Obstacles
- A. Lack of understanding of conservation design development (CDD), of its application
- B. No visual examples of typical plans
- C. Lack of effort by County officials to educate the stakeholders before last night's hearing. Hearing was too late in the political process for starting the education process.
- D. Language of the ordinance hard to understand.
- E. Vocal, well organized negative group(s)
- F. Apathy of the general public

III. Action Steps
- A. Make sure County Board has latest copy of proposed ordinance by Feb 16.
- B. Make personal contacts with key County Board members by Feb 18
- C. Organize informational forum at Somerset Town Hall hosted by Somerset Town Board, chaired by Warren Bader, Town Assoc. Chair, after end of public comment period Feb. 23.
    1. Invite Town Boards and Planning Commissions, County Board members
    2. Presenters = County staff
    3. Topics: CDD examples in the area, economic benefits, how this preserves community character.
    4. Open meeting so anyone may attend. Time limit on comments by individuals may need to be enforced so everyone has a chance to speak.
- D. Success indicators
    1. Informational forum well attended
    2. Informed questions at the forum show level of understanding

Regional/cooperative project = Work with Apple River Association in Polk County to form a similar group for the lower Apple River.

ACTION PLAN FOR BIG BEND NATIONAL PARK AND ITS GATEWAY COMMUNITIES

Introduction:

In February, 2006, a group of community leaders and park staff traveled to Shepherdstown, West Virginia to participate in "Balancing Nature and Commerce in Gateway Communities" offered by the U.S. Fish and Wildlife Service at their National Conservation Training Center. The group included: Ron Sanders, Chair of the Brewster County Tourism Council; Marsha Roberts, Marathon Chamber of Commerce; Tom Williams, Terlingua; Dan Dailey, Marathon; John King, Park Superintendent, and Lisa Carrico, Chief, Administrative Services, of Big Bend National Park.

During the training course, the group worked together to develop an action plan for Big Bend National Park and its gateway communities of Marathon and Terlingua/ Study Butte.

Vision Statement:

Our vision for Big Bend National Park and its gateway communities is to collaborate on activities that facilitate visitation enhancement, long term economic sustainability and citizen stewardship.

Desirable Conditions:

The following desirable conditions and action items were identified during a brainstorming session. The items were then prioritized by the group. Those in blue were identified as highest priority and are elaborated on in the next section as our "Action Items".

- Establishment of school/public library
- Recreational trails unifying town
- **Tourist traffic stops in town**
- Healthy, stable businesses
- Full service grocery co-op
- **Less visual blight**
- "Eco-village" (Green community)
- Young people engaged/empowered
- No/fewer environmental stresses
- Shared vision
- Recognize unique character of communities and build on it
- **Get infrastructure in place (water/sewer/electric)**
- Control signage/appropriate signage
- Full fire/EMS services
- **Community unity**
- Comprehensive plan

- “Entrance experience” developed
- Self reliant, healthy community
- Entrepreneurship encouraged
- More “creative” class
- Wind/solar power generation
- People gardening
- Clean, better looking Gateways
- **More cooperation/teamwork with communities**
- Establish visitor contact facilities
- Architectural appearance/standards agreed upon and systematically implemented
- Tourism promotion strategies employed that succeed in leveling out/expanding visitation and facilitating sustainable business operations
- Major clean-up/paint up/spruce up takes place

Action Items:

Create an “entrance experience”, including information kiosks, visitor contact stations and attractive, distinctive, appropriate signage.

Engage in “sprucing up efforts” and major clean up of our communities which results in less visual blight in our communities.

Get infrastructure in place in the Study Butte/Terlingua community (water, sewer and power).

Work to engender a greater sense of community unity between Big Bend National Park and the gateway communities of Terlingua/Study Butte and Marathon.

More cooperation and teamwork amongst the communities (Marathon, Terlingua/Study Butte)

Work Plan:

With the above action items in mind, the group agreed to focus on a few key projects, some of which could be accomplished relatively quickly. We hope that by showing progress our efforts will lead to other, more comprehensive projects.

The agreed upon projects are outlined in the following Work Plan which will be shared with community leaders and organizations in an effort to broaden support
and engage others in working towards a common vision and goals for our communities.

WORK PLAN FOR BIG BEND NATIONAL PARK AND ITS GATEWAY COMMUNITIES

GOAL and PROJECT	Action Items	Target Dates	Responsible Person(s)
GOAL: Create an "entrance experience", including information kiosks, visitor contact stations, and attractive, distinctive, appropriate signage. **PROJECT: Information kiosks in Marathon and Terlingua/Study Butte** **PROGRESS TO DATE:** The Brewster County Tourism Council has appointed a committee to begin working on establishing an information kiosk on the east side of Marathon. The committee is composed of members of the Marathon Chamber of Commerce and the Big Bend Tourism Council. A local land owner has been contacted regarding a location for the kiosk. Big Bend National Park has been asked to attend the next committee meeting.	Develop community consensus	None set to date.	Chambers of Commerce in Marathon and Terlingua County Officials Brewster County Tourism Commission
	Determine locations		Texas Department of Transportation Landowners Chambers of Commerce – Marathon and Terlingua
	Development of design and content		National Park Service subject matter experts Exhibit design firm
	Secure funding		Brewster County Tourism Commission Texas Department of Transportation

GOAL and PROJECT	Action Items	Target Dates	Responsible Person(s)
GOAL: Community Beautification through "sprucing up" and major cleanup of our communities which result in less visual blight in our communities. **PROJECT: Joint recycling efforts between Big Bend National Park and the Terlingua/ Study Butte community.** **PROGRESS TO DATE:** The Big Bend Chamber of Commerce organized the first joint recycling day. A total of 331 lbs of glass, 371 lbs of aluminum, and 87 lbs of cardboard were hauled to the recycling center in Big Bend National Park by local volunteers. Future recycling days are planned.	Lead by example	None set to date.	Contact individual businesses and residents
	Organize clean up projects		Chambers of Commerce in Marathon and Terlingua
	Recycling Program		Big Bend National Park partners with community
	Incentive/subsidies for participants		Friends of Big Bend National Park Brewster County Private businesses Individuals

GOAL	Action Items	Target Dates	Responsible Person(s)
GOAL: Establish Gateway Community Visitor Centers **PROJECT: None identified to date.** **PROGRESS TO DATE:** None.	Develop community consensus	None set to date.	Chambers of Commerce in Marathon and Terlingua County Judge and County Commissioners
	Determine locations		Chambers of Commerce in Marathon and Terlingua Texas Department of Transportation
	Design development and content		National Park Service and private contractors Planning Design Charette by private firm
	Secure funding		Texas Department of Transportation Tea-21 Private donors Texas YES

INDICATORS OF SUCCESS

- Enhanced visitation – i.e. people are staying longer in the park and gateway communities leading to increase revenues.
- Increased number of website hits
- Established businesses are retained and new businesses are established
- Visitor surveys indicate that comprehensive information about the Big Bend Region is widely distributed

Appendix G. Sample Evaluation Form

Balancing Nature and Commerce in the Gateway Communities of Western North Carolina

May 3-6, 2005 in Asheville, NC

Workshop Evaluation

In an effort to improve future course sessions, we would appreciate your feedback on this workshop. Thank you!

1. **How many months / years have you been involved in a gateway community / public land initiative?** *(Please choose one)*

   - ❑ Over 10 years
   - ❑ 6-9 years
   - ❑ 3-5 years
   - ❑ 1-2 years
   - ❑ 6 months-1 year
   - ❑ Less than 6 months

2. **Are you a representative of a:**

   - ❑ Gateway Community:______________________________
   - ❑ Public Land Unit:__________________________________
   - ❑ Other (please specify):___________________________________

3. **What was the most valuable part of the workshop for you?**

4. **What was the least valuable part for you?**

5. **We have tried to cover all topics relevant to gateway communities. Are there any other topics or issues you wish had been addressed? Were there any topics or issues you wished were not part of the workshop?**

6. **The team exercises have been integrated throughout the course to provide "planning" time for community teams and opportunities to apply concepts and approaches that are introduced throughout the workshop. Did you find these valuable? Do you have suggestions for improving them for future offerings?**

7. **Do you think the length of the course was:** *(Please choose one)*

    - ❑ Too long
    - ❑ Just right
    - ❑ Too short

8. **With regard to the course design, do you wish there were more, less, or the same amount of:** *(Please choose --* <u>more</u>, <u>less</u>, *OR* <u>same</u> *for each item)*

	MORE	LESS	SAME
Lecturing			
Questions & Answers			
Group Discussions			
Group Work			
Individual Work			
Practical Exercises			

9. How much did you learn during the workshop? *(Please choose one)*

- ❑ reinforced previous knowledge
- ❑ introduced some new information not known before
- ❑ learned a lot of new information
- ❑ provided additional information beyond my expectations for this course
- ❑ did not learn much new information

10. **We have tried to design a course for all types of participants.** *(Please choose either a OR b for each scenario).* **Would you prefer that the workshop:**

a) _____be geared to novices
b) _____be geared to more knowledgeable participants

a) _____be geared to team participation
b) _____be geared to individual participation

a) _____be geared to cross-section of gateway communities (i.e. from all regions and all types of public lands)
b) _____be geared to similar gateway communities (i.e. similar region of the country, one type of public land

11. **Regarding the composition of the course attendees, do you wish there were more or less of the following participants represented on your team?** *(Please check one for each category).*

	MORE	LESS	SAME	DOESN'T MATTER
Local government officials				
State government officials				
State public land managers				
Federal public land managers				
Private land managers				
National conservation organizations				
Local or state conservation organizations				

Chamber of commerce officials				
Tourism officials				
Developers				
Planners				

12. Prioritize the additional needs related to your involvement in gateway community projects. *(Where: 1=Need Most and 6=Need Least)*

_____ Continued Training: More offerings of this course/ more advances courses

_____ Additional Training: On-the-ground workshops and assistance in communities

_____ Additional Training: Distance learning (e.g. satellite broadcasting of interactive workshops, interactive web-based training)

_____ Technical Assistance: National Clearinghouse (e.g. Gateway community publications, toll-free hotline, website, list serve, etc.)

_____ Financial Assistance: Grants available for a gateway community/public land partnership project

_____ Financial Assistance: Increased budget for planning involved in gateway communities projects

13. Recommendations of other instructors for future course offerings:

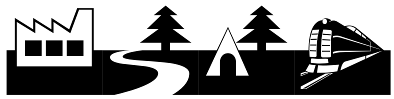
14. Recommendations for future workshop locations:

15. Other Comments/ Suggestions:

Appendix H. Sample Workshop Announcement/Application

Balancing Nature and Commerce

in the Gateway Communities of South Central Alaska



April 4-7, 2005

Anchorage, Alaska

Workshop Description

This 3 ½ day workshop will help teams of community leaders and their public land planning partners from South Central Alaska to develop, promote, and implement their own unique gateway community initiatives. The workshop will explore significant issues facing gateway communities throughout the Alaska region and tools available to address these issues, with an emphasis on building sustainable and complementary economic and conservation strategies. Seven gateway community teams of 4-7 team members from around the region will be selected to attend the workshop. Participating public lands include: Denali National Park and Preserve; Wrangell-St. Elias National Park and Preserve; Kodiak National Wildlife Refuge; Kenai Fjords National Park, and Chugach State Park. Room and board scholarships are available.

Workshop Focus Areas

- *Historical overview of economic, cultural, and environmental trends in land use within South Central Alaska*
- *Techniques for mapping the assets of and relationships between Alaska gateway communities and their neighboring public lands*
- *Benefits and tools for preserving community character and measuring the impacts of growth and development in gateway communities*
- *Opportunities for economic diversification in the region, including wildlife and cultural tourism strategies*
- *Impacts of public and private land management decisions on community growth and development*
- *Tools for community-based economic development, land use planning, and strategic natural resource planning*
- *Strategies for building partnerships between communities and land managers*
- *Tools for engaging the public and diverse community interests in community visioning and planning efforts*
- *Community/public land action plans developed by teams to secure the necessary support and resources to achieve community planning goals and objectives*

Workshop Instructors

Representatives from private and public sector institutions throughout Alaska, as well as from acclaimed national training organizations, will provide focused, timely, and region-specific information and resources. Featured speakers include Ed McMahon and Mark Benedict with The Conservation Fund, Delia Clark from the NPS Conservation Study Institute, and Ben Alexander from the Sonoran Institute.

How to Qualify

Priority will be given to communities or individuals that currently have "*planning teams*" in place which are:

- In or adjacent to the participating public land units
- Have diverse community representation and support, including one public lands manager and one elected official
- Discussing or addressing issues and impacts generated through their relationship with the public land unit(s)
- Have the support of their communities and local officials to address these issues
- Looking to develop partnerships with their public and/or private land managers, or bordering communities
- Are committed to sharing the information with interest groups and community leaders upon returning home

To apply:

Please complete the attached Workshop Application Form and mail or fax it the address below no later than February 1, 2005. You are encouraged to discuss your application with a representative from the workshop design team prior to submission: Miriam Valentine (NPS) 907-xxx xxxx; or Lisa Holzapfel (NPS/RTCA) 907-xxx xxxx.

Workshop Sponsored by:

The National Park Service, The Mat-Su Borough, Kodiak Borough, The Conservation Fund, Anchorage Greenways Coalition, University of Alaska, Alaska Conservation Foundation, and others

Balancing Nature and Commerce

in the Gateway Communities of South Central Alaska

Team Application

Community/Region ______________________________
Lead Contact Name ______________________________
Title ______________________________
Organization/Agency ______________________________
Street/PO Box ______________________________
City/State/Zip ______________________________
Telephone ________________ Fax________________ **Email**________________

Workshop Design Philosophy: Team-based Learning

This workshop has been designed to help community leaders, public and private land managers, and resource partners learn how to sustain the special character of their communities and public lands while managing the impacts of changing land uses and building partnerships between communities and land management agencies in South Central Alaska. The workshop will provide local teams the skills they need to respond to changes in land use and development, and take advantage of opportunities for positive, resource-based economic and community development. This hands-on course will encourage team-based learning and will produce collaborative action plans that 1) support communities as they design their own futures, 2) help citizens work together to encourage entrepreneurial activity that is in harmony with their community's natural resources and character, and 3) develop collaborations between public land managers, private land owners, the private sector, and local communities. For this reason, participants will attend as part of a 4-7-member community team.

Team Selection Criteria

While the make-up of every team will differ, all selected community teams will have at least one local elected official and one public lands manager. It is recommended that the remainder of the team is made up of some or all of the following: private businesses, local interest groups, local conservation organizations, developers, planners, community leaders, and other key stakeholders in the community or region. The key is to have a balance of all community interests.

Please submit a one-page, typed description of your community issues and your community or regional team that addresses the following questions:

- *Give us a brief description of your community or "place" and its current relationship(s) with the adjacent public land unit.*
- *What issues are you dealing with? Please describe the current issues in your community including land use, economic development, and ocial and cultural changes.*
- *What is your community currently doing to address these issues? Please describe current planning, community and economic development efforts, and other community efforts.*
- *What type of community support and involvement is there with your efforts? Please describe, such as public hearings, selectboard authorization, or planning board or conservation commission designation (letters of support are encouraged).*
- *What do you hope to learn at this workshop? List at least three things you would like to learn in support of your community team's efforts.*
- *Who else will be on your team? Please designate one person as the primary contact, and list the names and affiliations of the remaining members.*
- *Does your team have the commitment and infrastructure in place to follow through on action steps following this workshop?*
- *Is your community team willing to participate in a program to evaluate its progress for up to one year following the workshop?*

Appendix I. Pre-workshop Exercises

Balancing Nature and Commerce
in the Gateway Communities of Alaska

April 4-7, 2005
Anchorage, Alaska

Pre-Workshop Gateway Community Team Exercises

The training you are about to attend is different than most educational offerings in that it is grounded in collaborative learning. The workshop will provide tools and strategies for your gateway community team to preserve your community's assets while building key strategic alliances with organizations and agencies that can support and further your efforts. The workshop is highly participatory, and will involve many hands-on exercises and projects to help you take the concepts and best practices covered in the training and apply them to the opportunities and challenges in your community.

There will be 7 teams participating in this training, and each will vary in the amount of time they've worked together, the outcomes they are seeking, and the assets they are enhancing and protecting. It's important that some of the groundwork for goal-setting within each team is done prior to the workshop, and that team members are familiar with each other and their reasons for attending the workshop, and familiar with key land management agencies. Hence, a set of "pre-workshop exercises" has been developed for each team to complete prior to the April workshops.

The workshop steering team is requesting that each team meet as a group at least once between now and April 4, 2005. (It is <u>not</u> recommended that a conference call be substituted for a face-to-face meeting). Depending on the size of the team, the exercises shouldn't take more than two hours to complete. Attached is a worksheet to record your team responses. Team responses will be collected at the workshop commencement on the evening of April 4, and used to help guide discussions the next morning.

At the pre-workshop meeting, teams should have discussions around the following questions and requests:

1. **<u>Team Introductions</u>**. Who are the members of your team? What is their background? What is their key interest in being a member of the workshop team?

2. **<u>Public and Private Lands.</u>** What public land units (federal, state, or community) lie adjacent to or near your community? What about in your borough or region? Which

agency manages each of these public land units? Are there other private landowners that manage large parcels of land in your community or region?

3. **Key Issues.** What do you see as the priority issues facing your community or area? What do you see as the key opportunities related to economic development, land use planning, and/or maintaining and enhancing your community's sense of place and unique character?

4. "**Mapping Your Community" Exercise Materials.** At the workshop, the "Mapping Your Gateway Community" exercise will occur on Wednesday morning. It will set the stage for the remainder of the course by providing a holistic, functional model of how gateway communities work. You will be asked to apply this model to your gateway community (*keep in mind that the use of the term "gateway community" encompasses public land managers as well as residents, landowners adjacent to public lands, and other stakeholders*), mapping not only some key physical, social, and economic features, but also the institutional landscape in which you work. The main "equipment" needed for this activity will be your knowledge of your community, but it will be helpful if you can bring along the following materials:

   - Regional Map(s): bring a map, or maps, that show the regional context of your gateway community, including the relationship of the community to the river, park, or other public land for which the community acts as a gateway.

   - Community/Public Lands Map(s): bring a map, or maps (or maybe an aerial photo), that shows your community and/or your public lands in some detail. Community maps should show the local street pattern and public facilities (e.g. city hall, post office). Public lands maps should show resource areas, visitor facilities and other features relevant to gateway community/public land management. Community/public lands maps should be detailed enough to at least roughly locate major local facilities.

   - Visual Images: bring photos (postcards may be a good, quick source) of your gateway community and/or your public lands. For example, pictures of your community's main street and local or nearby attractions, or examples of natural or cultural assets.

5. **Other Initiatives and Materials:**
You may want to discuss other collaborative initiatives in the community that relate to public lands management, interpretation, and/or collaboration. You are encouraged to integrate the action plan that you develop at the workshop with other efforts when possible. You are also encouraged to bring materials, reports, or other resources from other collaborative projects that can be showcased in the exhibit area for all course participants and presenters throughout the week.

Appendix J. Other Resources

Publications

Brown, Jessica, Nora Mitchell, and Fausto Sarmiento, guest eds. "Landscape Stewardship: New Directions in Conservation of Nature and Culture." Special issue, *The George Wright Forum* 17, no. 1 (2000). www.georgewright.org/

Brown, Jessica, Nora Mitchell, and Jacquelyn Tuxill. "Partnerships and Lived-In Landscapes: An Evolving U.S. System of Parks and Protected Areas." *Parks* 13, no. 2 (2003): 31-41.

Brown, Jessica, Nora Mitchell, and Michael Beresford, eds. *The Protected Landscape Approach: Linking Nature, Culture, and Community*. Gland, Switzerland: IUCN-The World Conservation Union, 2005.

Clark, Delia, and Susan Clark. *Community Visioning. An Organizers Guide for Participatory Planning: Community Vision to Action Forums.* European regional edition edited and expanded by Blazena Huskova and Martin Nawrath. Brno, Czech Republic: Environmental Partnership for Central Europe, 2004. www.environmentalpartnership.org/publications/community_visioning.zip.

Diamant, Rolf, et al. *Stewardship Begins with People: An Atlas of Places, People, and Handmade Products*. Woodstock, VT: Conservation Study Institute, 2007. http://www.nps.gov/csi/ pub_resources/pub.htm

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Websites and Online Resources

Cooperative Conservation
http://cooperativeconservation.gov

Institute for Community Economics, Community Land Trusts
http://www.iceclt.org/clt/index.html

National Park Service Community Tool Box for Public Participation
http://www.nps.gov/phso/rtcatoolbox/

National Park Service Conservation Study Institute
http://www.nps.gov/csi

National Park Service Rivers, Trails, and Conservation Assistance Program
http://www.nps.gov/phso/rtca/

Pew Partnership for Civic Change, Resources
http://www.pew-partnership.org/resources/

Quebec-Labrador Foundation/Atlantic Center for the Environment
http://www.qlf.org

Sonoran Institute
http://www.sonoran.org

The Conservation Fund
http://www.conservationfund.org

The Conservation Fund's Conservation Leadership Network
http://www.conservationfund.org/training_education/about_cln

U.S. Environmental Protection Agency, Green Communities Program
http://www.epa.gov/greenkit/

Environmental Protection Agency, Conflict Prevention and Resolution Center
http://www.epa.gov/adr/

Watershed Support and Capacity Building
http://www.4sos.org/wssupport/ws-support-cap.asp