MEMORANDUM

To: Heart and Soul of Essex and other stakeholders of Essex, Vermont

From: Matt Leighninger

Date: January 3, 2017

Re: Summary of the Essex Public Engagement Workshop

On December 2nd, I shared the recommendations from my earlier memo with a diverse group of Essex stakeholders as part of a public engagement workshop. The goals of the workshop were to:

▪ provide an overview of public engagement practices, benefits, and innovations;
▪ explore the state of engagement in Essex;
▪ describe and strengthen engagement skills;
▪ inform the decisions Essex faces about how to improve and sustain engagement.

The leadership and support of Liz Subin and Sue McCormack were essential in making the workshop a success.

During the workshop, we started with my original list of recommendations and edited it, adding new ideas and removing others. Most of those recommendations had to do with potential engagement activities that could be sustained in Essex. Workshop participants commented on and ranked the following ideas at the end of the day (full results in Appendix A):

1. Rework large events to include engagement opportunities (6 votes)
2. Track and evaluate engagement, and produce an annual report (5 votes)
3. Support/capitalize on youth/student-centered learning (5 votes)
4. Develop a protocol for engagement (5 votes)
5. Establish a routine for communication between institutions and local online forums (5 votes)
6. Grow, support, and connect regular community gatherings (5 votes)
7. Participatory budgeting (5 votes)
8. Make adjustments to town/school meeting (3 votes)

9. Organize an annual large-scale engagement process (0 votes)

Full notes on the workshop, including a picture of the "History of Engagement in Essex" created by Liz Subin and Sue McCormack and then added to by the group, are in Appendix B.

The participants also spent a great deal of time on what we began calling the "structural option" – a plan for some kind of entity (in my earlier memo I called it an "engagement commission" or "engagement advisory board") that would be responsible for tracking, measuring, promoting, and overseeing public engagement in Essex. Some of the participants represented public institutions and others represented community organizations, and each set of people brought their own hopes and concerns to this critical discussion.

Overall, I felt that the group came to a substantial degree of common ground on the need for an advisory board or some other kind of structural option. The two strongest themes seemed to be:
- Staffing is critical to the success of this entity
- The entity should represent a range of organizations and institutions, and the community as a whole

The two areas that the workshop participants discussed, but had not come to an agreement on at the end of the session, were:
- How the lines of accountability should be drawn for a new entity
- How the entity would be funded

Representatives of local government felt that the entity could be funded by local government, but if so it would have to be legally accountable to elected and appointed officials. The community leaders in the room were enthusiastic about public funding but also wanted to ensure that the entity had some independence and autonomy.

A number of people expressed interest in being part of further discussions about the structural option: Liz Subin, Adam Sollace, Matt Whalen, Dawn Hill-Fleury, Brad Luck, and Sue McCormack.

Here are my observations:

- This seems like a question of checks and balances, and there are probably many different potentially helpful solutions. If the entity is legally accountable to the public officials, but invites the public to rate its work (through surveys, a dashboard, and/or a

participatory meeting open to all), it might retain the confidence of people inside and outside government – but that is just one option among many to consider.

- A little research into Vermont open meetings laws might be helpful, in order for everyone to understand how they apply in this situation.
- It could also be helpful to research similar engagement structures in other communities to understand the lines of accountability (for example, New Hampshire Listens has helped establish many local "Listens" groups)

Appendix A – Flipchart notes and vote counts from the discussion on potential engagement activities

Track and evaluate engagement, and produce an annual report (5 votes)
Yes
May need for potential funders
Need in order to measure goals
We already publish an annual report – add this to it
Metrics are important in order to track successes and failures
Way to hold us/community accountable
Way to demonstrate what is happening – make connections
Indicators – "report card" with advice on how to improve
No
Labor intensive
Who is going to do this?
Who is going to read it?
What would it inform? What would be done as a result?
Maybe
Commitment to connect report to action
Change "report" to "video"
Maybe with a common framework (results-based accountability?)
If clear goals are established first
[Matt Whalen put his name on this sheet]

Organize an annual large-scale engagement process (0 votes)
Yes
Sounds OK…
Could focus annual communication conversation on current topic
Good opportunity for elected/appointed boards to hear community's thoughts on a wide range of topics
No
…but who is going to do this work?
Maybe not most inclusive way of promoting engagement
Focus on what is already happening rather than create a new annual opportunity
Maybe
Fun? Worthwhile? Interesting? Piggyback on existing
Large-scale effort executed in a small, personal way

Rework large events to include engagement opportunities (6 votes)
Yes
Existing structures (example neighborhood watch)
People already attend
Chance to reach unengaged folks and engage them
Good opportunity for thin engagement
Leverage and trust already in place
No
Changes feeling/purpose of the event
May not generate anticipated increase in participation
Maybe
Piggybacking on an event vs. changing the event
If participation is optional
Engagement should be assessed on a case by case basis
[Darby put her name on this sheet]

Support/capitalize on youth/student-centered learning (5 votes)
Yes
As long as all students have representation
Sounds like a good idea!
Ensure youth are integral to the work!
Brings new demographics with fresh ideas
Adults behave better, less cynical = ideas get more traction
More innovative thinking
Needs to be a direct reflection of community values – make it part of everything we do
Parent engagement is so important!
No
Young people are over-scheduled
Maybe
Other supports/incentives for participation
With community, youth, parent and institutional buy-in
Match questions/projects to students' understanding, maturity, abilities
[Matt, Liz, Dawn put their names on this sheet]

Develop a protocol for engagement (5 votes)
Yes
If different protocols are allowed for different groups – e.g. ethnic groups, elderly
If you focus on basic interests the groups focus on

I would have no idea what that would look like…
Absolutely critical that there be a single protocol across entities
Could help municipal officials/staff make informed decisions about how/if the need to engage people
…and ensure consistent communications
No
Possibly confusing. Might not serve all entities. Some protocols for engagement may already exist
Maybe
Must also provide support/assessment to ensure protocol is being followed
If it helps show which strategy to use at which time to address the concern that "one size does not fit all"
May be seen as a formality barrier, much like current open meeting laws
Could be difficult to measure
If it is discretionary, and not mandatory
And flexible

Establish a routine for communication between institutions and local online forums (5 votes)
Yes
And: regular, predictable, ongoing, audience considered
Clear structures, roles/responsibilities of those doing the "communicating"
A good way to "advertise" school/municipal achievements
Could build trust between institutions and residents
This is not a volunteer job!
This is where the people are
No
Not until some "fact" clearing house/person is established to relate the entire, complete info
Maybe
Could be helpful!
Need clarity with open meeting law restrictions
Need support if staff would take this on
Need to be careful of information overload
Education on what is engagement and how it occurs
[Betzi put her name on this sheet]

Grow, support, and connect regular community gatherings (5 votes)
Yes
Improves and nurtures good working relationship

Groups already exist – use existing structures
Training/support for leaders, facilitators
You start where people are – build on natural interests
Way to reach across groups and see connections*
Regularly breeds tradition and trust
No
Labor-intensive, people don't have a lot of time
Would require tax dollars to fund
Could be hard to get on agendas of existing groups
*but what if non-diverse?
Difficult to work around work schedules at big plants – 4 day on/3 day off 12-hour shifts at IBM and Global
Not if it requires additional staff time
Maybe
How do you keep fresh and inclusive?
How to make sure all community members are included? (There may be many who aren't part of an existing group)
[Adam and Darby put their names on this sheet]

Participatory budgeting (5 votes)
Yes
Only if it is a small piece of the overall budget
Only if it is for the next year's budget – if it involves large outlays of money
If aligned with mission
More interest in budget/process
Sounds very interesting!
Article on budget of x% available for PB
Promotes community ownership of public assets
No
Because resources do not allow much discretionary spending
May never rise to level of engagement public wants, since funds are extremely limited
What happens when there aren't any funds available in a given year?
Maybe
Possibly? Need more info
When the budget is already sound
Grants available?
[Betzi and Liz put their names on this sheet]

Make adjustments to town/school meeting (3 votes)

Yes

Voter turnout is currently too low and can put budget at risk in the hands of a small rogue group

Confusing structure with so many budgets and dates

Whatever it takes to increase turnout

Town meeting (not village meeting) generates trust

New opportunities to engage interested people who want more interaction

Make annual meeting an event again, not just a meeting. Include PB in TM

No

Town meeting is already perfect!

Face-to-face input is extremely valuable to the organization

Town meeting rocks!

Go to Australian ballot – eliminate town meeting

Maybe

If it increases voter turnout

Take Essex Governance Group findings into account

Is town meeting format actually public engagement?

With the exception of actually voting, town meeting is really just another public engagement event with mediocre turnout

Space is an issue

Keep TM night for discussion – with town/school/rec – then vote in April on all

[Dawn put her name on this sheet]

Appendix B – Workshop notes compiled by Liz Subin

Workshop participants:
Mark Andrews - Superintendent, ETSD
Dijana Kulasic - Essex Planning Commission
Max Levy - Essex Selectboard
Mark Drapa - Westford School Board
Pat Scheidel - Town/Village Manager
Dana Hanley - Town of Essex
Betzi Bilodeau - Recreation Study Governance Committee
Darby Mayville - Village of Essex Jct
Diane Clemens - EWSD Board
Adam Sollace - EJRP
Barbara Higgins - Essex Development Commission
Sharon Kelley - Town of Essex
Paula DeMichele - Town & Village
Matt Whalen - Essex CHIPS
Dawn Hill-Fleury - BCA/Town School Board
Kim Gleason - ETSD Board/EWSD Board
Janet Hunt - VT Assoc. Of Area Agencies on Aging
Jill Evans - Essex Community Justice Center
Brad Luck - EJRP
Julie Miller-Johnson - 5 Corners Farmers Market
Greg Duggan - Town of Essex
Ally Vile - Essex Parks and Rec
Liz Subin - H&S Essex, EWSD and U#46 School Board
Susan Clark - Slow Democracy
Leanne Tingay - Orton Family Foundation
Elaine Sopchak - Village Trustees
Sue McCormack - H&S Essex, Everyday Democracy
John Alden - Village Planning Commission

1. History of Engagement In Essex
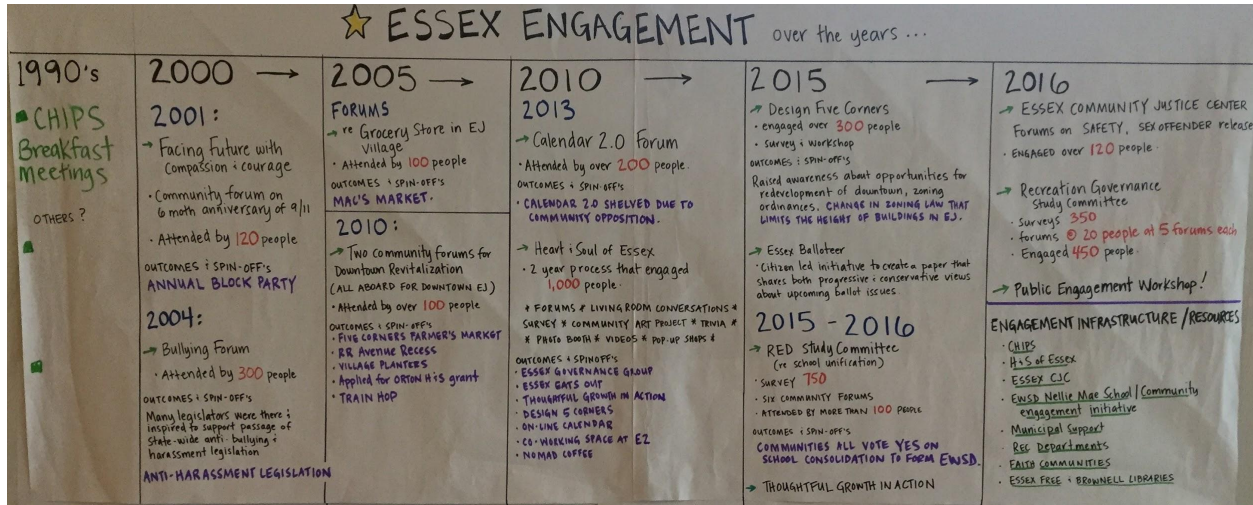
The group looked at a timeline of engagement efforts in Essex since 1990. Participants had a chance to add missing events and talk about which ones worked and could be built and which ones were more problematic.

What stood out?

- A lot of the engagement that is on the board has come from Essex Junction. Seems like there might be less engagement happening in the town outside the village. Not sure why - possibly a different demographic.
  - However, Town did a good job getting lots of community engagement around the town plan
- See lots of positive cause and effect. See some lasting effects
- Heart & Soul was a departure because it wasn't reactive, but a proactive look at broad issues
- Generational change in the people involved. And the point of engagement has changed depending on the issues.
- New leaders have emerged
- Important strategy, especially around education for the community to own the vision (especially around schools)

Fallen Short?

- Same two hundred people involved in everything - how can you break through and include more people.
- Gap in engagement with businesses. This was stronger back in the 1990s and has fallen off in the 2000's.
- If you don't have students in the school, there is a lack of awareness about what is happening in schools. Need to do better engagement so community members without students understand what is happening in the schools
- May need better relationships/more communication among town and school officials - perhaps a structure for joint meetings
- There are opportunity gaps in our schools based on income, ethnicity, etc. How do we do true engagement with diverse people in order to create an education system that works for all of the community's children
- Need to measure our engagement - who participates, who is missing, etc.
- Capacity issues around online engagement.
- The municipality is doing more than the community is aware of (town went to meet with New American families and people don't know about it)
- Need central engagement infrastructure that holds people accountable
    - Need policies that lay out expectations for engagement
- Ongoing weight of merger vs. non-merger. That thread should be superimposed across everything. That movement or lack of movement is constantly in the background and has impacted the community.
    - Many people still don't know the whether they live in the village and the town
    - Need to find new ways to engage people across the boundaries that don't always involve going to public forums, etc.
    - There are different governance structures here that complicates the situation
    - We often have the same people at the same tables and we focus more on historical issues, and not as much on newcomers who have a different perspective

What Can We Build On?

- Personal face to face engagement
- Online platforms for engagement have strong participation
- Charrette for Design 5 Corners

- Go to the people (neighborhoods, churches, existing events, etc.)
- Free food and child care

What Can we Learn From?

- Ongoing tension between village and town
- Design 5 Corners (NIMBY)
- How can we engage better in our more formal settings
- Provide various times and dates for meetings
- Town is as very different culture from village. The approach must be different and respectful of differences
- Sustainability is difficult
- Difficult in getting people involved
- Build understanding about how public gets their information
- Challenging rules about how we can conduct our business (open meeting laws, etc.) - these structures sometimes work against being inclusive and transparent.

2. Presentation

Matt gave a presentation and large-group discussion on the factors driving the need for engagement, the strengths and limitations of current engagement practices, and the latest directions for innovation

- Online engagement
  - Often disconnect. People who know the law, don't know the internet, people who know the internet don't know the law. Bring these people together to help figure out what can be done
  - Some cities have changed their ordinances around public participation. State laws are also a challenge.
  - One reason capacity is such a problem is the silo issue. No single group has the capacity to do what is needed. Lack of coordination among entities
- Common shortcoming of project based engagement is that it is often difficult to carry ideas forward.

- ○ Communities that have regular patterns of engagement have more accountability (citizens are more accountable to officials, officials are more accountable to citizens)
- State of modern citizens
  - ○ Citizens are different from how they were 50 years ago
    - ■ we have had a parent child relationship with our leaders. We want an adult relationship
  - ○ Less good at being governed. Better at participating in Governance
  - ○ Parents most motivated to get engaged
  - ○ People don't just want to engage in politics, they want to engage in community
  - ○ People now belong to geographic AND online communities
- Be clear about purpose of engagement BEFORE you decide on structures for engagement
- Often, it is helpful to broaden the process beyond a very targeted decision. This can offer multiple incentives for participation
- Build in opportunities for individual action
- Weekly meetings good timeframe
- Meaningful engagement
  - ○ Information
  - ○ Chance to tell their story
  - ○ Choices
  - ○ Legitimacy
  - ○ Chances to take action
  - ○ Good process
  - ○ Food & Fun

3. Debrief of small group discussions re Matt's Presentation

- The idea of regular engagement vs. episodic engagement is interesting
- One important idea is that you can't just wing it. This work takes lots of intention and planning
- Need physical infrastructure for online and face to face engagement
  - ○ Where are welcoming places where people can go to engage?
- 100% necessary to stop thinking and working in silos

- ○ Heart & Soul work was a way to communicate engagement results out to all segments of community
- There is a need for "code switching" and use of language that speaks to every community member (even term "community engagement" problematic)
    - ○ Like the name "Portsmouth Listens"
- Engage with community in many different ways - one on one conversations that are the most fun and informal, then gatherings like this workshop, then adversarial regulatory processes that are the most difficult
    - ○ Planning commission has open mic nights and are prepared for negative comments - maybe change format and have everyone sit in a circle to change the dynamic
- Could be important to have a hired person to carry out engagement work, but having someone who is independent and not directly connected with municipality could be good
- Could be good to have a public engagement coach who could help existing staff with their engagement work

4. Examples of sustained engagement
- Neighborhood Learning Circles
    - ○ Twice monthly meetings happening since 1998
    - ○ Two hour meetings on weeknights
        - ■ First hour is social event (performances, food, party)
        - ■ Hour two is small group discussion about a particular issue
        - ■ Always a kids circle as part of the gathering
    - ○ Incentives
        - ■ Many recent immigrants participate - incentive to learn English
- Weekly Meet & Eat since 2009
    - ○ Have issues on the tables for people to discuss
    - ○ Public officials started coming now that this has a critical mass of people
- Town that runs on Twitter, Jun Spain
    - ○ Mayor uses twitter for all questions, requests, complaints, policy discussions
    - ○ 25% of town residents participate
    - ○ Trained residents who didn't know how to use Twitter
    - ○ Collected everyone's twitter address

- ○ Trained all town employees to use twitter to communicate about what they were doing
- ○ Space connects citizens and elected officials w/range of incentives to work collaboratively
- Participatory Budgeting
  - ○ Fall: People work on ideas, work with municipal officials to make sure they are feasible (sometimes neighborhood assemblies)
  - ○ Spring: Idea fair where people vote on how to spend the money - which ideas to fund
  - ○ Amount of $$ available not that significant. Could do this with small pot of money.
- Budgets & Beer
  - ○ People go to pubs to talk about the city budget with city officials
  - ○ Touch a budget
    - ■ Bring police cars, etc. to the square with label showing how much they cost

5. Matt's Recommendations

- Pay attention to the different blocks of engagement
  - ○ Individual decision-making opportunities/collective decision-making/volunteer
  - ○ missing that middle level - add in
  - ○ Dissemination of information
- Engagement advisory committee
- Track engagement (participation, etc.)
- Annual engagement report
- Have annual or semi-annual large community gathering
- Make some adjustments to annual town/school meetings
  - ○ Small advisory groups working with staff ahead of time
  - ○ Using online forums for moderated discussions ahead of time
  - ○ Hold some small group discussion during town/school meeting
  - ○ Keypad technology/text, talk, act to allow people to weigh in during the meeting
- Make student centered learning a centerpiece of engagement
- Using online community forum

● Develop a protocol for engagement

6. Engagement Structures

Possible structures:

1. Hire a director of engagement (independent but funded by institutions) AND a commission of representatives (trained facilitators?) from each of 10 Front Porch Forum areas AND a process of PB by neighborhood
2. Use Heart and Soul nonprofit (with paid director–funded by multiple sources and institutions), network, and task teams for the six core value areas (and some kind of geographical representation)
3. Create "Essex and Westford Listens" – elements of 1 and 2, plus other constituencies (not just geographic)
4. Establish and Engagement Advisory Board with appointed members (raise eng't to a cabinet-level position) funded by elected bodies – staff person who reports to elected bodies.

Options:

● Engagement commission (members elected by neighborhood)
● Engagement advisory board (members appointed)
● Committee of officials (town, village, school, etc.)
● Collective impact steering committee and backbone organization
● Appoint a civic engagement 'czar'
● Use Heart & Soul coordinating group/nonprofit (and its subcommittees)

Common themes:

1. Paid staff person
2. Concerns about representation (geographic)
3. To be Decided: lines of accountability

Questions/Comments:

1. Can we phase into this slowly over time?
2. Isn't it important to have grass-roots buy-in?
   a. ML: It is important to have buy-in from both the grassroots and the the official institutions
3. Neighborhood Assemblies was a recommendation of the EGG - that report is a resource that we should look at
4. Sometimes, public engagement people hired through municipalities, do fill more of a pr kind of role. This is a common thing that happens, often because engagement is poorly defined.

December 6, 2016.

Submitted by Liz Subin