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I. Introduction to the Citizens’ Institute on Rural Design™

The Citizens’ Institute on Rural Design™ (CIRD) provides communities access to the resources they need to convert their own good ideas into reality. CIRD offers annual competitive funding to as many as four small towns or rural communities to host a two-day community design workshop. With support from a wide range of design, planning, and creative placemaking professionals, the workshops bring together local leaders from non-profits, community organizations, and government agencies to develop actionable solutions to the community’s pressing design challenges. The community receives additional support through webinars, conference calls, and web-based resources: www.rural-design.org

CIRD’s process for improving communities follows a holistic approach - assessing the synergistic roles of streets, sidewalks, buildings, public spaces, commercial districts, natural areas, historic and cultural resources, amenities, activities, security, management, and other factors in and around the site – all of which can contribute to the potential for a true “place.” Our process begins with discovering what the people in a community need and desire in their public spaces.

Established in 1991 as Your Town: the Citizens’ Institute on Rural Design, CIRD has convened more than 70 workshops in all regions of the country, empowering residents to leverage local assets for the future in order to build better places to live, work, and play.

CIRD remains one of National Endowment for the Arts’ key design leadership initiatives, and is currently conducted in partnership with the U.S. Department of Agriculture and Project for Public Spaces, Inc., along with the Orton Family Foundation Partnership.

II. Introduction to the Coordinator’s Manual

CIRD workshops are quite simple, but they do require active and ongoing participation from our host organization to make them work. This guide is intended to help you get the most out of your workshop by helping CIRD staff to tailor it to suit your particular needs and those of your community.

The manual is intended as a full reference guide for all components of the workshop conceptualization, organization, and production. (This manual is not organized in chronological order, and some sections duplicate information.) The text of the manual is augmented by the sample documents included in the Appendices. The manual is intended as a guide to help the Coordinator through the entire production process, but it can be adapted to respond to the needs and context of each workshop.

CIRD staff will help you to organize a two-day on site workshop, which will engage local stakeholders in identifying issues, contributing ideas, and making decisions about how to implement these ideas. The workshop may require participants to make structured observations, using both common sense and intuition, and to participate in design exercises. It will tap local knowledge of the study site, the surrounding areas, and potential partners for implementation.
III. CIRD Workshop Objectives

CIRD workshops are designed to:

- **Set the stage** for a cooperative improvement program by getting people in the community to think about positive change both on and around the workshop site or study area, and how they can work together to achieve it.

- **Establish an inclusive process** where the stakeholders can give input and get involved in developing a program and vision for a workshop, and/or the study area around a workshop.

- **Provide information to workshop designers** on issues such as desired activities in public spaces in and around a building, a roadway, a transit facility, or district; entryways, elements, and amenities; and ground-floor uses and other programming for a building.

- The outcome of this design workshop will be a series of recommended improvements, many of which are small-scale and can be phased in quickly to bring immediate benefits to your community. The process also will help establish relationships with a broad range of local partners with whom the workshop host community can work to implement the improvements recommended in the workshops and findings report.

The CIRD 2018 program is focused on helping rural leaders and residents come together to find creative solutions for the following design issues:

- **Multimodal Transportation** – Examples of design challenges include: Improving bike/pedestrian access in your community; retrofitting commercial strips to accommodate pedestrians; the development of recreational trails for mobility and economic development; mobility for the elderly and aging in place; context sensitive rural highways and byways; integration of arts/culture/design to improve transportation or pedestrian experience.

- **Healthy Living by Design** – Examples of design challenges include: Creating public space that supports play and active recreation; improving access to healthy food and local food eco-systems; enhancing access for walking, biking, and active transportation/recreation; building social cohesion and opportunities for social interaction via creative placemaking.

- **Main Streets** – Examples of design challenges include: Leveraging Main Street for economic development; redesigning Main Street as a local street versus state highway/thruway; cultivating/enhancing public space on main street via design or creative placemaking; branding and design along Main Street; historic preservation and adaptive reuse of Main Street buildings; maximizing the role that arts and culture can play as an economic driver for local and regional economies.
IV. CIRD Staff

CIRD staff will guide you throughout the workshop planning process. They will help you develop curriculum and materials; visit your workshop site before the event; and guide you through all the steps of recruiting Resource Team members, speakers, and participants and the promotion and marketing of the event. At least one of them will attend your workshop as an observer. On occasion, NEA Director of Design or other representatives of the Arts Endowment may attend as well.

CIRD Staff include:

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Workshop Preparation
## Workshop Preparation

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Agenda Development

A strong workshop is grounded in clear goals and issues, along with a sense for how to best engage desired participants in addressing them. Here are key steps to ensure this happens:

1. Clarify Workshop Goals and Issues

Your application noted one or more goals and issues and now is your chance to clarify and refine them. You can’t put a workshop agenda together without clear workshop goals. Sounds obvious, right? You’ll want to think about two types of workshop goals:

Short-term goals are those that you’d like to achieve by the end of your workshop. They are tangible (e.g., creation of a downtown master plan) and measurable (e.g., number of people who participated in workshop activities). Short term goals need to be realistic (what’s possible in your time frame?) and meaningful (will they positively influence or benefit the community?).

Long-term goals are outcomes you’d like to see in your community as a result of your workshop, typically within 5-10 years. They are often less tangible and measurable (e.g., a greater sense of community) and may be evident only after many other initiatives have come to fruition (e.g., a more vibrant downtown). While achieving your short-term goals enables these outcomes, other forces like a changing regional economy or demographic shifts also influence them.

You’ll want your goals set in the context of the design issue or problem you are hoping to address. Here are some hypothetical design issues derived from past CIRD workshops:

**Downtown is at a critical evolutionary juncture.** Several vacant lots exist in the downtown core, and most historic buildings are in a deteriorated state. The City Council has proposed increased pedestrian amenities and improvements to the streetscape as priorities. On the positive side, the state Department of Transportation has budgeted $3 million for Main Street improvements. Your task is to compose a list of priorities for downtown and to develop designs for selected improvements. The list and designs should address the following:

- The appropriate extent of a pedestrian-focused district
- Tourist attraction and retention
- Streetscape design and pedestrian amenities
- Preservation/restoration of historic buildings
- Architectural themes
- Improvement of City Hall

**Your town is growing, both through residential and commercial development.** The town has designated an 80-acre parcel of land adjacent to the town boundary to target that growth. Anticipated components include:

- Small-acreage home sites close to town
- Larger sites farther away
- Non-industrial commercial areas
- A system of trails
- Public recreation areas
- Preservation of open-space vistas

Your task is to develop a conceptual plan showing what development on the parcel should look like. You should explore how development should be arranged so that it is both practical and sensitive to the community’s natural and cultural resource base.

**Your town wants to attract and retain tourists by creating community gateways.** The entrances into town send messages about what kind of place it is and wants to be. Your assignment is to identify the key design elements of the gateways into town and
explain and illustrate how these gateways can be improved.

» The goal and issue setting exercise in Appendix A can help you clarify your workshop goals and issues.

2. Identify Participants

Once you know what you are trying to achieve, it’s time to think about who needs to be in the room to help you achieve it. It is critical that workshops include a diverse and committed group of community participants at all events, with a core group attending all sessions and additional opportunities for the broader public to participate and offer feedback.

Past workshops have looked to secure a core group of around 30-40 participants for the majority of the workshop but your workshop’s goals might lead you to decide on a different target number.

» The Community Network Analysis tool in Appendix B can help you identify and recruit key participants, including representatives of many diverse stakeholder groups in your community.

» Page 48 in Communications provides a checklist and timeline for communications and outreach.

Certain stakeholder or demographic groups are critical to involve in some way in most CIRD workshops.

- Decision-makers (local government or other)
- Community leaders from all sectors
- Local business community
- Youth
- Newcomers and longtime residents
- Stakeholders representing diverse cultural, economic, age, political, and other types of viewpoints

Whether you are drawing participants from the local community or from across a region, you should write them a letter or email, telling about the upcoming CIRD workshop and asking for their interest in participating. This letter should give a good sense of the workshop format and content. Be sure the potential participants understand that they will be responsible for their own expenses but that meals will be provided.

Other important selection considerations include age, gender, and ethnic diversity, the geographic distribution of the participants, and the mix of participant backgrounds. Institutional or regional political considerations may also play a part in your selection process.

It is critical that participants attend the entire workshop from beginning to end. As you recruit people, be sure they understand the commitment of time they are expected to make, and get them to agree to that commitment.

Once the ideal mix of participants has been identified, invite approximately 35 people, no later than one month prior to the workshop. Although most people who receive an invitational letter will accept, inevitably several people change their minds or encounter last-minute crises that prohibit their attendance. Give invitees a deadline of no later than two weeks before the workshop to confirm their attendance.
3. Develop Workshop Structure and Agenda

With a clear idea of your workshop goals, issues, and participants, you can lay out a workshop structure and design your agenda. CIRD has identified the following core workshop elements that are effective in supporting a variety of community goals and issues:

1. Values & Vision
   Session to identify or confirm community values & vision or assets

2. Public Participation
   Session(s) or methods for involving general public and getting their feedback

3. Education
   Session(s) with Resource Team members providing ideas & education about issues

4. Design Work
   Session(s) that include idea generation and review of the design challenge

5. Interactive Work
   Session(s) where community members can work together in diverse groups on addressing challenges

6. Action Planning
   Session to prioritize ideas and create a plan for moving forward

7. Built-In Networking
   It’s important to give participants the chance to connect with each another outside of the structured sessions. Incorporate this time into the agenda.

These core elements can be accomplished through a variety of session types:

Public Forum
Large public event designed to share information and get feedback from the general public

Open House
General public is invited to drop in, observe, and participate at various times

Site Visit
Visit to the site in question. Could include virtual, walking or bus tour

Keynote or Panel
Lecture-style session where Resource Team members present on the issues

Large Group Discussion
Larger groups gather to hear and offer feedback, brainstorm ideas, and/or prioritize actions

Breakout Groups
Small groups gather for presentations, discussion, or other activities

Charrette
Intense design session (usually drawing), followed by presentation and discussion of designs and ideas

Other
Get creative! What would work for your community?

There are many creative and effective ways to facilitate and structure each type of session, and CIRD staff will be happy to work with you to suggest or brainstorm ideas that will work best for your needs. Here are a few less common methods and activities that have worked well for CIRD workshops:
Fishbowls. A group of 3-6 people sit in a circle in the middle of the room and have a conversation, while the rest of the audience sits in a circle around the group and listens in. This can be a less formal and more interactive way of having a panel discussion, or a good way to share a variety of perspectives on a hot topic.

Learning Carousel. Presenters each offer one session to a smaller group of participants (ideally 10-15). The groups then switch, so that every person gets to hear each presentation. Ideal way of offering presentations to smaller groups while ensuring that each person hears the full session.

30 Circles. Participants (as individuals or in pairs or groups) are given a large piece of paper with 30 circles on it. They are given an idea or challenge on which to brainstorm for a set period of time. Their goal is to fill as many circles as possible with ideas in that time period (going for quantity, not quality). Words, symbols and drawings are fair game, as is combining circles.

World Café. Participants break up into groups of 3-5 at small tables. Each table has a different question or topic that the group discusses for a set period of time. After the set period of time is up, each group changes and moves to a new table, while a permanent host remains to help the next group make progress on the same question. Tables can be covered in paper so participants can take notes, draw and doodle.

Gallery Walk. Once designs or ideas have been developed and are ready to be shared, groups write or draw them on large pieces of paper and post them on the walls. Everyone can then walk around, read and observe. This can be a more interesting way of having groups “report out.”

With these suggestions in mind, you’re now ready to think about the structure and agenda for your workshop. We recommend the following overall structure for most CIRD workshops:

Day 1: Vision & Values
Evening public engagement event to identify or confirm values and give overview of workshop.

Day 2: Understanding Issues & Options
Mix of presentations, discussions and group work. Understand design challenges and options.

Day 3: Plans & Actions
Mix of group work, feedback sessions, and prioritization and action planning. Review options, make choices, and set next steps.

Below are some sample agendas. Numbered circles indicate which of the core workshop elements are addressed in each session.

These sample agendas provide only a very general outline of the two days. You will want to think about things like appropriate start and stop times for your group, the best times and ways to handle meals and breaks, and how to mix up sessions. While your own workshop design can differ from these sample agendas it’s essential that you discuss any deviation from the core workshop elements noted above. CIRD staff are prepared to work with you to design a workshop structure that fits your workshop goals and local capacity.

Appendix C provides a workshop planning worksheet and sample agendas you can use to design your workshop.
The Work Plan

Once you know what you are trying to accomplish you can create a workshop road map that illustrates the who, what, when and how of your workshop activities. This process involves the following steps:

1. Develop a Workshop Timeline

Here is a sketch of key activities over the months leading up to and following your workshop. Use this timeline to map out your specific timing and dates planning backward from the date of your workshop:

Six to Four Months Prior

Internal Administration

✓ Review and sign CIRD contract
✓ Submit W-9

Work Plan

✓ Draft Workshop Team roles and responsibilities and send to CIRD staff
✓ Establish a call schedule with CIRD staff (on a monthly basis)
✓ Draft a detailed workshop planning timeline (see Appendix D, page 33)

Workshop Planning

✓ Review and edit workshop overview goals and topics (see Workshop Preparation: Appendix A, page 18)
✓ Solicit names of potential Resource Team Members from the community and coordinating team and submit to CIRD (see Appendix H, page 40 and 49)
✓ Identify key community stakeholders to invite (see Appendix G, page 36 and 49)

Workshop Logistics

✓ Set workshop dates
✓ Select and reserve a workshop venue (see page 15)

Communications

✓ Draft local press release announcing selection as a workshop host and send to CIRD staff (at least 2 weeks before you plan to release it) (see example in Communications: Appendix L, page 56)

Four Months Prior

Work Plan

✓ Mark your calendars for workshop planning and capacity building calls (see sample call agendas here – http://bit.ly/1NnCdSC)
✓ Schedule and plan for the CIRD team site visit

Workshop Planning

✓ Identify potential workshop participants via Community Network Analysis (see Workshop Preparation: Appendix B, page 21)
✓ Draft workshop format and agenda (see pages 6-9, Appendix C, page 28, Appendix D, page 33, Appendix H, page 40)
✓ Select and invite speakers/Resource Team with CIRD staff (see page 17 and Appendix I, page 42)

Workshop Materials

✓ Develop the Workshop Packet Table of Contents (see page 64 and Appendix Q, page 70)

Communications & Outreach

✓ Develop a detailed communications plan (see pages 46-48)
✓ Send local press release announcing the workshop once approved (see Appendix L, page 56)

Three Months Prior

Work Plan

✓ Increase calls with CIRD staff to a biweekly basis
Workshop Preparation

Workshop Planning

✓ Site visit by the CIRD team
✓ Confirm/update workshop goals (see page 21)
✓ Finalize the workshop agenda and format

Workshop Logistics

✓ Begin to solicit in-kind contributions (e.g. food, materials, volunteers) (see page 15; track progress, see Appendix U, page 83)

Workshop Materials

✓ With CIRD’s help, request all informational materials for the Workshop Packet (see pages 65–66)
✓ Begin collecting and organizing the Workshop Packet materials

Communications & Outreach

✓ Update invite/outreach list for workshop (see Appendix B, page 21, Communication Plan, page 48, and pages 49–51)
✓ Draft invitation text and send to CIRD staff (see Appendix N, page 58)
✓ CIRD staff organizes a call with the local partners and Resource Team

Two Months Prior

Workshop Planning

✓ Finalize workshop agenda (see Appendix D, page 33)

Workshop Logistics

✓ Arrange for Resource Team accommodations (see page 15)
✓ Recruit local volunteers, assign staff (see Appendix R, page 72)

✓ Draft a master list of workshop materials, equipment, and supplies (6 weeks prior) (see Workshop Materials, page 67)

Workshop Materials

✓ Send Workshop Packet materials to CIRD (6 weeks prior to workshop)
✓ Finalize Workshop Packet Table of Contents (5 weeks prior)

Communications & Outreach

✓ Finalize invitation list
✓ Send invitations (request RSVPs) (see page 48)
✓ Confirm and organize invitation responses in a spreadsheet (see Appendix P, page 61)
✓ Draft a flyer and pre-workshop press release and send to CIRD staff (at least 2 weeks before you plan to release them) (see Appendix M, page 57 and Appendix O, page 60)
✓ Ramp up promotion of the workshop (e.g. social media, flyers) (see page 47)
✓ Send a package of these approved materials to CIRD for distribution to other federal partners and representatives

One Month Prior

Workshop Planning

✓ Review Resource Team presentations

Workshop Logistics

✓ Order/secure all workshop supplies and equipment (see page 67, and Appendix R, page 71)
✓ Arrange for meals, refreshments and other food related supplies (see page 15)
Workshop Preparation

✓ Arrange for transportation for Resource Team to and from workshop locations (see page 16)
✓ Complete Workshop Preparation Checklist (see Appendix R, page 71)

Workshop Materials

✓ Make final revisions to the Workshop Packet with CIRD staff
✓ Begin collecting and organizing other workshop materials (i.e. maps, speaker bios, other resources to display, activity descriptions, handouts) (see page 67)

Communications & Outreach

✓ Follow up by phone with invitees who have not yet responded
✓ Send thank you and teaser info out to confirmed participants
✓ Distribute flyers and send final press release (see Appendix M, page 57 and Appendix O, page 60)

Month of Workshop

Workshop Logistics

✓ Confirm workshop venue details and logistics (see page 67)
✓ Confirm volunteers and task assignments, arrange for a time-keeper
✓ Coordinate room layout and set-up (i.e. tables/chairs, printed materials, name tags, A/V, etc.) (1 week prior) (see Appendix F, page 35)
✓ Divide participants into small groups for round-table discussions and planning—separating participants with similar professions and skills

Workshop Materials

✓ Finalize all workshop materials (see page 67)
✓ Assemble workshop material folders for participants (i.e. agenda, speaker bios, etc.) (2 weeks prior)
✓ Send formatted Workshop Packet out to participants via email (1-2 weeks prior) (see page 64)

Communications & Outreach

✓ Continue to promote the workshop via social media, flyers, ads, etc. (see page 47)
✓ Follow up on workshop invitations (see Appendix O, page 60)
✓ Invite local press to the workshop (2 weeks prior)
✓ Send confirmation email to participants with key logistical information (2 weeks prior)

✓ Hold your workshop!

Month After Workshop

Communications

✓ Draft post-workshop press release and send to CIRD staff (within 1-2 days after the workshop)
✓ Send press release (7-10 days after, once approved)
✓ Thank all participants, speakers and sponsors (within ten days of the workshop) (see page 76)

Workshop Reporting

✓ Distribute, collect, review and summarize evaluation forms 2 weeks after (see Appendix T, page 81)
✓ Participate in workshop debrief and capacity building calls (3-4 weeks after)
✓ Share plans for follow-up activities with CIRD staff (see Appendix V, page 84)
✓ Produce workshop report within 2 months of the workshop (see a sample report here – http://bit.ly/1NnCdSC)

Community Follow-Up

✓ Hold local committee celebration and debrief (2 weeks after)
✓ Share results, photos, outcomes and next steps with the public
✓ Take action on your workshop results and begin seeking funding for implementation
✓ Plan follow up activities with CIRD staff

2. Revise and Update a Task List

We have provided a series of task lists as provided in the Appendixes. Feel free to adjust the time and responsible party.

3. Confirm Your Budget

Once you have established your workshop goals, have a general workshop structure and know who you plan to recruit as speakers, you can revisit your budget to make sure it is still accurate. Make sure to discuss any changes to or reallocation of your budget over $1,000 with CIRD staff.

The $10,000 stipend and matching funds may be allocated to cover:

- Facility rental
- Planning and producing a public engagement event
- Printing course materials and other resources
- Rental of A/V equipment
- All materials needed for workshops (easels, flip charts, name tags, pens)
- Insurance as required by local statutes or the rental facility
- Outreach and publicity for the workshop, including website and traditional media
- Transportation or special arrangements for field trips or tours
- Recording and sharing stories and results from workshops, including photography or videography
- Implementation of follow-up steps and actions from the workshop
- Labor and any associated costs for organizing the workshop, including:
  » Organizing workshop logistics
  » Workshop program development
  » Recruiting workshop participants
  » Writing post-workshop evaluation reports
  » Maintaining and reporting on expenditures
  » Breakfast, luncheon, or refreshments for participants and Resource Team members during the workshop

4. Identify and Secure Matching Funds

Workshops will take more than the $10,000 stipend to cover all expenses. Now is the time to secure any cash or in-kind commitments you noted in your application or seek out additional funding depending on your workshop design.

We encourage host towns to seek at least $10,000 in matching funding, which may take the form of funds raised or donated by local organizations, including in-kind donations of goods and services (e.g., printing, space, or refreshments during the workshop). Matching funding can also include commitments of staff time and resources, which are critical to organizing a workshop.

5. Assess Your Progress

Since the planning and preparation process can at times be hectic, it is helpful to slow down and assess your progress on (at least) a monthly basis. Here are four questions you can ask as a workshop team:
• What progress have we made?
• What’s working well that we want to continue doing?
• What’s not working so well that we can change?
• What adjustments do we need to make to our workshop plan moving forward?

Appendix E provides a Team Check-In Exercise.

6. Make Adjustments

It’s inevitable that you’ll need to make some changes to your work plan along the way, either as a result of a reflective team discussion or because something happens beyond your control (e.g. a Resource Team member has to drop out). Expect changes and be ready to adapt by having the communication channels and team trust in place for a more seamless process overall.
Logistics

Early on in your workshop preparation you’ll need to make decisions about a number of logistics. Here are the key considerations:

1. Setting the Dates

The dates for your workshop should be set as early as possible. At an absolute minimum, the dates should be set three months in advance, but preferably at least four months in advance.

Check the calendar for holidays, national meetings, school openings or closings, or other cultural events, which could conflict with the workshop.

2. Facility Reservations

As soon as you have selected the facility in which to host your workshop and have determined that it is available for the dates you have in mind and affordable for your budget, you should reserve the desired space and sign a contract with the facility to lock in the dates. Most likely, the facility will have its own standard contract. Reservations should be made for both meeting space and sleeping rooms if accommodations will be at the same facility (see below).

3. Meeting Rooms

Give consideration to the arrangement of tables and chairs in the main meeting room based on how you plan to hold group sessions throughout the workshop. In addition to the main meeting room, be sure to specify that you need breakout rooms and that participants need access to them throughout the entire workshop. Discuss the full range of your audiovisual needs and make sure that the meeting room can be darkened sufficiently for slides. More information is provided in the workshop logistics section of the manual.

4. Accommodations

CIRD will cover the costs of four Resource Team members and CIRD/Orton staff.

You will be asked to assist in finding local accommodations for us. Bed and breakfasts, homestays with workshop team members, dormitory rooms, as well as hotel and motel lodgings are all acceptable options.

You may be able to persuade the facility to provide a couple of guest rooms or an operating suite on a complimentary basis (an in-kind contribution).

5. Meals and Breakouts

The menus for all the meals and breakouts can be planned well in advance. In meal planning, strive for variety, balance, quality, health, and perhaps regional specialties—we recommend food that is locally sourced, prepared, and catered, when possible. For disposable dishware, please choose alternatives to styrofoam.

Common sense should guide the meal planning (e.g. make sure to provide vegetarian meal options). Basic refreshments—coffee, tea, water and/or juice—are necessary. Meetings are often better attended if snacks or a meal are offered (and advertised), so that people are not concerned about missing lunch or dinner.

It’s a good idea to provide at least one meal with the Resource Team members. You might want to change the scenery, maybe visit a picnic spot or special site within reasonable driving distance from the meeting venue. You may also want to accompany or follow the dinner with local entertainment—a country band, square dancing, storytelling, a one-act play—or with an art exhibit or film.

Keep in mind, the facility you select may have a site on its grounds for outdoor barbecuing or
picnicking, or there may be a site within easy driving distance to stage such an event.

6. Transportation

Each participant should be responsible for making his/her own travel arrangements to the workshop. If your participants will arrive by air or train, you may want to offer a shuttle service or put participants in touch with each other for hiring a cab, limousine, or van and coordinating arrivals and departures.

Resource Team members will receive complimentary airline tickets courtesy of Southwest Airlines, the official carrier of Workshop for Public Spaces. Inc. Resource Team members will arrange their own travel.

Appendix F provides a task list and timeline for logistics and event planning.
CIRD workshops include participation by a Resource Team of design and community development professionals, whose expertise matches the specific design issues or challenges of the host community. Here are the steps to secure your Resource Team:

1. **Identify Resource Team Members**
   
   CIRD maintains a network of nationally recognized professionals in architecture, landscape architecture, community and regional planning, historic preservation, creative placemaking, and other design fields who may be available to participate in the workshop (list provided separately).

   Once you have set your workshop goals and discussed your ideas for workshop structure and topics with CIRD staff, we will provide you with a list of 4-6 recommended Resource Team members. Consider our recommendations, your ideas, and local resources, and then develop a list of your preferred Resource Team members and at least one alternate for each.

   You may also wish to recruit a speaker to address the finale on Day Two. This may be an important person in your organization who you have not included as a Resource Team member or involved in the workshop, but who deserves some recognition, or you may want the representative from the Arts Endowment to speak. This person’s address should be brief, congratulatory, and encouraging in tone.

   Resource Team members should be identified four months prior to your workshop.

   Appendix H provides an exercise to help you identify local resources and Appendix I provides a Resource Team planning schedule.

2. **Getting Approval for Resource Team Members**

   The names of all Resource Team members and alternates must be submitted for review to the CIRD staff and NEA in advance. Do not invite anyone until you have cleared the person’s name with the Endowment and CIRD. Often alternative resource persons will be suggested and others removed. Please note this is the standard process for developing the final resource list.

   You will also need to think about whether your workshop structure and agenda require additional facilitators, small group leaders, designers, recorders, or other helpers. CIRD staff will be happy to help you determine what additional roles or resource people you may need. Under no circumstances should the workshop coordinator plan to serve in major design or facilitation roles during the workshop.

   Small-group facilitators can work with the groups on the design problems. For example, the approximately 30 participants could be broken into four groups, but the number of groups can vary. These group leaders must be committed to staying throughout the entire workshop! Also, a few volunteers will be needed to help with registration and logistics.

3. **Inviting Resource Team Members**

   CIRD will invite the speakers first by telephone. Once their attendance has been assured, we will ask you send a follow-up letter or email to confirm the details of time and place and the arrangements you can make on their behalf.

4. **Follow-Up**

   You and CIRD staff will need to be in regular communication with your Resource Team as your workshop agenda develops. You should arrange a call with them and CIRD staff as soon as they are approved by NEA, and be in touch with them on an as-needed basis prior to your workshop.
Appendix A: Setting Clear Workshop Goals

Why Are They So Important?

Workshop goals are the most important part of your workshop concept. People need to understand what your workshop is about if they are going to support it and/or participate in it. Your goals are the first thing people are going to look at, so make sure you have written them in a clear, concise way that people can understand.

Here are a few examples:

» This workshop will result in an update of the Town’s Comprehensive Plan, which guides how local leaders will make decisions about the future of our community.

» Avoids jargon by explaining what a Comprehensive Plan is.

» This workshop will aim to improve walkability in our downtown so that people of all ages feel comfortable and safe there.

» Says why the goal is important.

» This workshop will strengthen our local economy by building on what’s unique about our town.

» Highlights a known concern in the community – the economy.

» This workshop will engage many people from all walks of life so that we can set a course of action that reflects what we all want for our town’s future.

» Explains why community participation is important.

Types of Workshop Goals

Most community workshops have short- and long-term goals:

Short-term goals are those that you’d like to achieve by the end of your workshop. They are tangible (e.g. creation of a downtown master plan) and measurable (e.g. number of people who participated in workshop activities). Short-term goals need to be realistic (what’s possible in your time frame?) and meaningful (will they positively influence or benefit the community?).

Long-term goals are outcomes you’d like to see in your community as a result of your workshop, typically within 5-10 years. They are often less tangible and measurable (e.g. a greater sense of community) and may be evident only after many other initiatives have come to fruition (e.g. a more vibrant downtown). While achieving your short-term goals enables these outcomes, other forces like a changing regional economy or demographic shifts also influence them.

Many longer-term goals will be refined as a result of your workshop since the community, as a whole, will set the course for your town’s future. However, you may already have a general sense for the types of long-term goals you’d like to achieve, like greater walkability or more specific business growth.

Group Exercise – Setting Goals

- Objectives: Define short- and long-term workshop goals; begin to think about key workshop design considerations
- Time: 60-90 minutes
- Participants: Small group – likely the handful of people who you know are interested in the topic and want to play a significant role in its development from the start.
- Materials: Flip chart, markers, goal worksheets, sticky dots
Steps

If you already have draft goals, skip to Step 4.

1. **Brainstorm all possible goals listing them on a flip chart.** Follow the basic rule for brainstorming – no judging or commenting during the brainstorm. Alternatively, you can instruct participants to work quietly and independently for 3-5 minutes. They should write down what they think 1-5 of the most important goals of the workshop should be. Have them write down each goal separately on a post-it note or index card.

2. Once you have completed the brainstorm ask people if they have any questions about what any of the possible goals mean. Go through each goal. Combine any goals that are the same. Don’t worry about wordsmithing at this stage – just get the general concept right.

3. Next, using a narrowing technique, ask people to prioritize the goals. Potential narrowing techniques include Dot Voting, High-Medium-Low Ranking or Yes-No-Maybe categories. You want to narrow down to 3-5 goals.

4. Once you have agreement on the general goals, use the Workshop Goal Worksheet to refine each of the identified goals. Use one worksheet per goal. Depending upon the size of your group and the group dynamics, you can break into smaller groups to work simultaneously on goals in order to speed up the process.

5. Each group reports back. To share results you can have each group report out verbally and/or pass the different goal worksheets around for each work group to read and make comments. You may find that some goals drop off the list or that some can be combined. Then determine next steps (e.g. who’s going to take responsibility for final wordsmithing of the goals).

Workshop Goal Worksheet – Defining Workshop Goals

1. **What is our goal?**

2. What is the specific issue, challenge or opportunity that it addresses?

3. Is it short-term (by workshop completion) or long-term (5+ years out)?

4. What do we hope to gain by engaging community members in addressing this goal?

5. Who will likely be responsible for implementation related to this goal?

6. What other current or recent community efforts might impact this goal?
Sample Workshop Goals from Franklin, NH (2015)

Workshop goals:

Possible “framing questions:” How do we make Franklin a healthy and vibrant community for all citizens? vs: What does Franklin need to consider to support “aging in place?”

Short Term Goals (by the end of the workshop)

This workshop will...

• Engage a cross-section of Franklin community members to develop and set in motion an action plan that reflects what residents want for a multi-generational community in the future, which may include housing, community design, transportation, the arts, businesses, a revitalized downtown, others

• Engaged citizens will sign up and commit to being part of the process of implementing the action plan.

• Determine ways in which the community can improve citizens’ own perceptions of the city and living in Franklin.

• Assess what Franklin looks like now, in terms of demographics, housing, transportation, local economics, businesses, arts, economic development and community resources (much of this information is already be available and needs to be compiled before the site visit).

• Identify why older members of the Franklin community are leaving the city.

• Educate community members and regional/state stakeholders about why aging is an issue we need to discuss and the demographic changes in the state and Franklin.

• Determine community responses to an aging population and aging in place/in community, which may include housing, community design, transportation, the arts, business needs, a revitalized downtown, support services, other.

• Use the arts to connect intergenerational community members.

• Develop resources and a model that can be used in other NH communities to respond to an aging population.

Longer Term Goals

This workshop will...

• Create a community environment that encourages older community members to remain in Franklin, keeping them active and encouraging their community contributions. This may include the arts, housing options, transportation, community design, a revitalized downtown, support services, other.

• Create a healthy environment for multigenerational individuals throughout their lifespan that includes the physical, social, natural, and economic environment.

• Develop community responses to aging that will also revitalize and strengthen the local economy and infrastructure of the city.
Appendix B: Community Network Analysis

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Introduction

Community Network Analysis (CNA) is a powerful tool for understanding who lives, works and plays in your community and how best to reach them. It’s meant to be used repeatedly to identify: 1) workshop leadership, 2) partners and 3) participants.

CNA is part stakeholder analysis (it identifies people and organizations that may influence or be influenced by a particular workshop), but it goes beyond that by considering the connections among different community groups. It also provides a framework for how you can tap into the different demographics in your community.

CNA is designed to be done in steps, some that can be tackled in a single meeting, some that require multiple meetings, and/or some that are intended to be revisited depending on how you are using it in your workshop. As you work through the steps, you can organize data in a matrix or Excel spreadsheet to use as a resource as you plan workshop activities.

CNA is only as good as the knowledge of the people who pull it together. The first time you do your analysis, you may only have a small group, but don’t be deterred! You’ll have the chance to refine your analysis as you engage more people in planning and implementation.

Steps

1. Know your demographics. Local socioeconomic data helps ensure that you’re considering the whole community, particularly those demographic groups that might be a greater challenge to reach or might be in the minority in terms of religion, race, class, education, income or age. You can use this profile to double-check whether you are being inclusive as you walk through the steps in Community Network Analysis and when you design and carry out activities. Here are a few resources that allow you to create profiles of your town:

   - Economic Profile System–Human Dimensions Toolkit: Developed by Headwaters Economics, this Microsoft Excel based tool allows people to produce detailed socioeconomic profiles. (Free) http://headwaterseconomics.org/tools/eps-hdt#pdfmap

   - American Factfinder: The US Census Bureau created this online tool where you can customize demographic reports that draw on the most recent Census data. (Free) http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml

   - Dataplace: Online tool that allows you to examine a variety of socioeconomic data that comes from US Census and other sources. (Free) http://www.dataplace.org/

   - ESRI Tapestry: Can create market segmentation profiles that pull on a variety of data sources. (Some cost) http://www.esri.com/data/esri_data/tapestry.html

2. Identify stakeholders. Have your group brainstorm the different stakeholders that need to be engaged. Make sure to include people and organizations that are typically not part of the planning process, as well as those who might be skeptical of your planning effort. One useful brainstorming technique is to have each person write one name per sticky note, post them all on the wall and then organize them according to any overlap.
Questions to Ask:

- Who might be affected by the outcomes of the workshop?
- Who can offer new insights and perspectives?
- Who is responsible for implementing workshop recommendations?
- Who might oppose or stand in the way of the workshop?
- What groups (formal and informal) exist in the community that we don’t hear from?
- Are there priority stakeholders we need to engage and why?

Each community is different, but here are some common stakeholders: businesspeople, conservationists, faith communities, landowners, renters, farmers/ranchers, police and firemen, parents, young families, youth, town officials, minorities, historians/elders, outdoors-people, culture and arts supporters, neighborhood leaders and other civic and service groups.

Example:

<table>
<thead>
<tr>
<th>Stakeholders</th>
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</thead>
<tbody>
<tr>
<td>Main Street business owners</td>
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<tr>
<td>Mill Street neighborhood</td>
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<tr>
<td>Families</td>
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<tr>
<td>Artists</td>
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<tr>
<td>New Americans</td>
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<tr>
<td>Youth</td>
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<tr>
<td>Government</td>
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<tr>
<td>Local churches</td>
</tr>
<tr>
<td>Local non-profits</td>
</tr>
</tbody>
</table>

3. **Identify Your Community Networks.** Networks speak to how people are connected to each other in a community and how information is shared among them. These networks, or connections, may be formal, such as people belonging to a particular organization, or informal, like a group of people who share the same local hangout or interest. Networks may also be centered on geography, such as a neighborhood. You can outline how stakeholders in your community are connected through networks.

Questions to ask:

- How and/or where do the stakeholders in our community gather or meet?
- What formal organizations represent our stakeholders?
- What informal ways are our stakeholders organized?
Example:

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Networks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Street business owners</td>
<td>Chamber of Commerce, Donut Club, Main Street Program</td>
</tr>
<tr>
<td>Mill Street neighborhood</td>
<td>Mill Street Neighborhood Association</td>
</tr>
<tr>
<td>Families</td>
<td>PTA, local churches, soccer club, meal swappers</td>
</tr>
<tr>
<td>Artists</td>
<td>Third Arts Studio</td>
</tr>
<tr>
<td>New Americans</td>
<td>Mill Street Neighborhood Association, ESL Center, Refugee Resettlement Program Office</td>
</tr>
<tr>
<td>Youth</td>
<td>Schools, 4-H, skateboarders</td>
</tr>
<tr>
<td>Government</td>
<td>Departments, Boards, Commissions</td>
</tr>
<tr>
<td>Local non-profits</td>
<td>Main Street Program, grassroots environmentalists</td>
</tr>
</tbody>
</table>

4. **Identify Your Network Connectors.** Connectors are people who are trusted by others to provide sound counsel, useful information and help link people to each other. If they are willing, they can provide insights into the community, be ideal Community Advisory Team members or help spread the word about your workshop. Network connectors complement other communications methods (like mailings and posters), and often provide the personal touch necessary to get people to participate.

**Questions to ask:**

- Who do others routinely go to for advice?
- Who are seen as trusted opinion holders or as leaders in the networks?
- Who regularly spreads the word about community happenings or comes into regular contact with many people?

“Snowball” sampling is a good way to identify network connectors. This approach can use brainstorming, surveys, or a combination. It relies on each person you ask to identify other essential people. For example, ask an organization’s 10 board members each to identify 10 people or groups they work with and that they think could help the workshop. Then go to each of the people identified and ask them the same question. The results are exponential, and important patterns emerge. Certain individuals or organizations will be named much more frequently than others (the connectors), and studies have shown that these people are not usually identified in traditional stakeholder identification processes. Once you have a Community Advisory Team in place you can also look for the connections they have to the networks. These links will be helpful in reaching out to different people at every stage of your Heart & Soul process.
Example:

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Networks</th>
<th>Connectors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Street business owners</td>
<td>Chamber of Commerce, Donut Club, Main Street Program</td>
<td>Mel Stevens (Chamber President), John DiGregorio (Donut Club Secretary), Terry Smith (Diner owner)</td>
</tr>
<tr>
<td>Mill Street neighborhood</td>
<td>Mill Street Neighborhood Association</td>
<td>Sasha (Market owner), Carl Alexander (neighborhood block leader)</td>
</tr>
<tr>
<td>Families</td>
<td>PTA, local churches, soccer club, meal swappers</td>
<td>Rev. Fernandez, Chris McDonald (PTA Secretary)</td>
</tr>
<tr>
<td>Artists</td>
<td>Third Arts Studio</td>
<td>Rick Lovell (Local sculptor)</td>
</tr>
<tr>
<td>New Americans</td>
<td>Mill Street Neighborhood Association, ESL Center, Refugee Resettlement Program</td>
<td>Sasha (Market owner), Debbie Johnson (Resettlement Director)</td>
</tr>
<tr>
<td>Youth</td>
<td>Schools, 4-H, skateboarders</td>
<td>Sarah Smith (Student Council President), CT Nguyen (student assistance counselor), Darby Clark (librarian)</td>
</tr>
<tr>
<td>Government</td>
<td>Departments, Boards, Commissions</td>
<td>Mayor Kassel, Jack Temple (DPW Director), Terry Smith (Paris Diner owner)</td>
</tr>
<tr>
<td>Local non-profits</td>
<td>Main Street Program, grassroots environmentalists</td>
<td>Terry Smith (Paris Diner owner), Jenny Stevens (Third Thursday organizer)</td>
</tr>
</tbody>
</table>
5. Identify Communication Opportunities. Your networks are going to get and share information in two primary ways – through face-to-face conversations and a variety of communication channels. Conversation opportunities are the regular places and times—be they formal or informal—where your networks or network connectors are likely to be available.

Questions to help identify conversation opportunities:

- What are the gathering places where your community’s networks hang out (e.g. coffee shops, hair salons, pubs)?
- What are the activities that these people attend regularly (e.g. group meetings, sports events, community suppers, ball games)?
- What community events offer the chance to mingle with multiple networks (e.g. county fairs, town wide festivals, church suppers)?

Communication channels are the different ways that people get and share information within their networks. A particular network may get information in a variety of ways; it’s important to figure out which ones are the most effective so that you don’t spend a lot of time and money using ones that don’t actually work that well.

Questions to help identify communication channels:

- Where do most people turn to get local news (e.g. local newspaper, local radio or television, bulletin boards, websites, coffee shops)?
- Which local media channels hit multiple networks?
Example:

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Networks</th>
<th>Connectors</th>
<th>Communication Opps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Street business owners</td>
<td>Chamber of Commerce, Donut Club, Main Street Program</td>
<td>Mel Stevens (Chamber President), John DiGregorio (Donut Club Secretary), Terry Smith (Diner owner)</td>
<td>Paris Diner, Chamber listserv, Donut Club breakfasts, Downtown Festival, Reporter Newspaper, Facebook</td>
</tr>
<tr>
<td>Mill Street neighborhood</td>
<td>Mill Street Neighborhood Association</td>
<td>Sasha (Market owner), Carl Alexander (neighborhood block leader)</td>
<td>Forest Park, Fifth Street Market, Downtown Festival, Facebook Group</td>
</tr>
<tr>
<td>Families</td>
<td>PTA, local churches, soccer club, meal swappers</td>
<td>Rev. Fernandez, Chris McDonald (PTA Secretary)</td>
<td>Forest Park, Kingstown Library, Downtown Festival, Sunday faith services, Reporter Newspaper</td>
</tr>
<tr>
<td>Artists</td>
<td>Third Arts Studio</td>
<td>Rick Lovell (Local sculptor)</td>
<td>Studio Saturdays, Downtown Festival</td>
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<tr>
<td>New Americans</td>
<td>Mill Street Neighborhood Association, ESL Center, Refugee Resettlement Program</td>
<td>Sasha (Market owner), Debbie Johnson (Resettlement Director)</td>
<td>Fifth Street Market, ESL classes</td>
</tr>
<tr>
<td>Youth</td>
<td>Schools, 4-H, skateboarders</td>
<td>Sarah Smith (Student Council President), CT Nguyen (student assistance counselor), Darby Clark (librarian)</td>
<td>Facebook, school newsletters, Kingstown Library, Skate Park at Forest Park</td>
</tr>
<tr>
<td>Government</td>
<td>Departments, Boards, Commissions</td>
<td>Mayor Kassel, Jack Temple (DPW Director), Terry Smith (Paris Diner owner)</td>
<td>Paris Diner, municipal newsletter, Reporter Newspaper</td>
</tr>
<tr>
<td>Local non-profits</td>
<td>Main Street Program, grassroots environmentalists</td>
<td>Terry Smith (Paris Diner owner), Jenny Stevens (Third Thursday organizer)</td>
<td>Paris Diner, Essex Reporter</td>
</tr>
</tbody>
</table>
6. **Identify Network Resources.** Different networks are likely to hold a variety of skills, knowledge and resources. Take the time to listen and look for these possibilities early on; you will likely identify potential assets and partnerships that could leverage the resources you already have.

Questions to Ask:

- Do any networks offer specific skills or expertise that would be valuable to the workshop?
- Do they offer hard assets (like meeting space or equipment) that we could use?
- Might they consider funding the workshop or sponsoring particular events?

7. **Understand connections of networks to your workshop.** Think about how your networks typically relate to planning in your community and what position they might take regarding your workshop. Will they be easy to engage? Will they be indifferent? Will they be skeptical or even hostile? Using sticky notes, you can organize this information using a circle diagram like the one here. This information can help you prioritize your community outreach and engagement efforts.
# Appendix C: Workshop Planning Worksheet and Sample Agendas

<table>
<thead>
<tr>
<th>Agenda Planner</th>
<th>DAY 1</th>
<th>DAY 2</th>
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Sample Agenda -
from Isle de Jean Charles, LA (2017)

Use the following agendas as templates for drafting your own agenda

Friday, January 27, 2017
Terrebonne Parish Main Library
151 Library Dr, Houma, LA 70360

9:30am  Site tour & Official Ceremonial Welcome to Community
        Resource Team Members
        Pickup will be at the Courtyard Marriot

11:30am OPEN REGISTRATION - Terrebonne Parish Main Library, Houma, LA

12:00pm Refreshments with IDJC Team and Resource Team members

1:00pm Welcome Ceremony - Chief Albert Naquin
      Workshop Protocol - Chantel Comardelle, Tribal Secretary & Workshop Organizer

1:30pm Presentation of Tribal Vision – Chantel Comardelle, Tribal Secretary & Workshop Organizer

2:15pm Briefings from Selected Resource Team Members
      Site Design – Joe Evans, Evans + Lighter
      Building Design – Joseph Kunkel, Sustainable Native Communities Collaborative
      Safety/Resilience – Julie Rochman and Tim Reinhold, Insurance Institute for
      Business and Home Safety
      Memorialization – Kelly McHugh, National Museum of the American Indian

3:00pm State and Federal Agency Comments

3:15pm Facilitated Discussion Regarding Programming – Nikki Crowe, Thirteen Moons

4:00pm Learning Carousels
      Design – Joseph Kunkel, Sustainable Native Communities Collaborative
      Programming – Nikki Crowe, Thirteen Moons
      Resourcing – Alessandra Jerolleman, Lowlander Center

5:30pm Learning Carousel Report Outs

6:00pm Closing Ceremony – Chief Albert Naquin

6:30 pm Dinner Resource Team and partners- Pickup will be at Courtyard Marriott
Saturday, January 28, 2017
KC Hall Montegut, LA
501 Goode St, Houma, LA 70360

10:00am Opening Ceremony – Chief Albert Naquin
10:15am Presentations from other Communities
   Stanley Thom, Newtok Tribal Council
   Kelsey Moldenke, Quinault Indian Tribe
11:00am Abridged POWER OF TEN – Cynthia Nikitin, Project for Public Spaces
11:45am Design and Programming Recommendations from Resource Team
12:30pm Design and Programming Recommendations from State and Federal Partners
12:45pm Lunch and Presentations
   Museums - Sue Herne, Akwesasne
1:30pm Design Work
   Joseph Kunkel, Sustainable Native Communities Collaborative
   Joe Evans, Evans + Lighter
   Eddie Cazayoux, EnvironMental Design
4:00pm Overview and Wrap Up: Strategies for Implementation
5:00pm Closing Ceremony – Chief Albert Naquin
Optional Evening reception – Jolly Ann

Kid’s Program
Saturday January 28, 2017

11:00am Tribal kids and youth parallel visioning- Jack Martin
12:45pm Lunch
1:30pm Tribal kids and youth parallel visioning- Jack Martin
4:00pm Tribal kids and youth rejoin group and present their vision
Sample Agenda - from Alton, MO (2014)

November 20-22, 2014
Alton Community Worship Center
5563 Drive 9595
Alton, MO  65606

Thursday, November 20

10 am  Welcome & Introductions
Rachel Luster, Founder, Oregon County Food Producers & Artisan Co-Op
Debbie Sallings, Alton Chamber of Commerce
Patrick Ledgerwood, Presiding Commissioner
Cynthia Nikitin, Director, Citizens’ Institute on Rural Design

11 am  Oregon County/Ozark’s Vernacular Architecture
Barbara Williams, Artist and Professor, Missouri State University
Mike Luster, PhD, Director of the Arkansas Folklife Program

12 pm  Lunch

1 pm    Site Visit to Future Co-Op Space

2 pm    Productive Landscapes
Jesse Vogler, Visiting Assistant Professor, Sam Fox School of Design and Visual Arts
Emily Vogler, Landscape Architect, Michael Van Valkenburgh Associates
Jesse & Emily Vogler will introduce the ways architects and educators study and design
America’s agricultural landscapes, while engaging multiple constituencies and audiences.

2:30   The M12 Collective: Exploring Rural Culture and Landscapes
Richard Saxton & Kirsten Stoltz, Creative Director and Director of Programs, M12 Collective
Richard Saxton and Kirsten Stoltz of the M12 Collective will present M12 workshops that focus
on building a dialogue about the rural condition.

3 pm    Learning Carousels: Architecture & Site Design
Jesse Vogler:  Building location, siting and integration into the square
M-12: Learning open action workshop

4 pm    Repeat of Learning Carousels
Participants join the second of two carousels

Friday, November 21

10 am  Rural and Proud
Maria Sykes, Founder, Epicenter
Maria Sykes will present on creative workshops and programs of Epicenter, a rural non-profit in
the town of Green River, Utah (pop. 953), with a special focus on the renovation of a derelict
building using volunteer labor and minimal budget.

10:45  Cooking Up Something Special with Local Ingredients: Growing a Co-op in Alton
Ben Sandel, Leadership Development, Startup Co-ops, Capitalization, CDS Consulting
Ben Sandel presents on how to assess feasibility for expanding a co-op and provides an
overview of the ingredients necessary for a successful co-op workshop.
11:30  Learning Carousels: Building Design and Functional Layout of Programming
Maria Sykes and Mark Wise will each lead a group in a design discussion and exercise.

12:30 pm  Lunch

1:15 pm  Fruit for Public Spaces in the Ozarks
Guy Ames, Founder, Ames Orchard & Nursery and Horticulture Specialist
Guy Ames will speak about the many varieties of fruit trees and bushes that thrive in the Ozarks that can be grown without pesticides.

2:00 pm  Learning Carousels – Participants divided into two groups
Group 1: Building design with Maria Sykes and Mark Wise
Group 2: Co-Op Consultation with Ben Sandel

3:00 pm  Walking Tour of Potential Edible Courtyard Site with Guy Ames and Emily Vogler

3:45  Recap of Next Steps
Participants will report out key findings from their Learning Carousels, highlight key lessons learned and agree upon ideas for further development by the Resource Team for presentation at the Public Session on Saturday.

Saturday, November 22nd

3:00 pm  Public Open House

5:00 pm  Celebration in the Square!
# Appendix D: Workshop Agenda and Program Checklist

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible Party</th>
<th>Recommended Date Done by CIRD</th>
<th>Date Accomplished</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review and edit workshop overview goals and topics (see Appendix A)</td>
<td>Workshop Team</td>
<td>4-6 months prior</td>
<td></td>
</tr>
<tr>
<td>Draft workshop agenda and format</td>
<td>Workshop Team</td>
<td>4 months prior</td>
<td></td>
</tr>
<tr>
<td>Confirm Goals for the Workshop: Goal Setting Exercise</td>
<td>Workshop Team</td>
<td>4 months prior</td>
<td></td>
</tr>
<tr>
<td>Draft workshop agenda and topics</td>
<td>Workshop Team</td>
<td>4 months prior</td>
<td></td>
</tr>
<tr>
<td>Develop site specific training content</td>
<td>Workshop Team</td>
<td>3 months prior</td>
<td></td>
</tr>
<tr>
<td>Develop Workshop Workshop Packet: includes workshop schedule, bios of speakers, and articles and useful resources</td>
<td>Workshop Team with CIRD</td>
<td>3 months prior</td>
<td></td>
</tr>
<tr>
<td>Prepare maps and resources to share/display</td>
<td>Workshop Team</td>
<td>1 month prior</td>
<td></td>
</tr>
<tr>
<td>Print workshop materials: agenda, etc.</td>
<td>Workshop Team</td>
<td>2 weeks prior</td>
<td></td>
</tr>
</tbody>
</table>
Appendix E: Team Check In

Group Exercise – Team Check In

This exercise can be used to evaluate your workshop at key transition points and help you improve it moving forward.

- Objectives: Celebrate workshop progress, identify ways to improve workshop moving forward
- Time: 60-90 minutes
- Participants: Workshop team members, workshop partners and other key volunteers
- Materials: Flip chart, markers, sticky notes, paper

Steps

1. **Party!** Make this meeting a celebration! Start with a potluck meal or head out to a favorite local restaurant. Welcome people and acknowledge their hard work. (The following steps could occur while folks enjoy their food or start after.)

2. **Review Progress.** Start by reviewing your workshop’s goals and activities to date noting any milestones or key workshop stats (e.g. number of people participating, partnerships formed, local press stories). [10 mins]

3. **Reflect.** Ask people to spend one minute thinking about the following question, “What do you feel has been the most exciting or meaningful result of this workshop to date?” Then ask people to share their answers in pairs. After, ask a few people to share with the full group. [15 mins]

4. **Read the Temperature.** Ask people to rate how well the workshop is doing in making progress towards its goals. (If you are focusing the reflection on a particular phase of your workshop, then you’ll want to include that particular phase goals in your review of progress.) The “Fist to Five” method is an easy way to do this; ask people to hold up the number of fingers they feel matches the level of progress they see where 0 fingers would be no progress, 5 fingers would be tremendous progress and the others would be on a scale in between.

5. **Assess.** As a full group ask the following questions:

   - What are you doing well that you want to continue doing?
   - Looking back, what would you have done differently or do you think you should stop doing?

Capture people’s input on a flip chart.

6. **Move Forward.** Break people into small groups to brainstorm ways they see to improve the workshop moving forward. Ask folks to report out their top ideas. [20 mins]

7. **Next Steps.** Have workshop staff or team volunteers review and organize the ideas and bring a list of suggestions back to the team for consideration at the next meeting.
## Appendix F: Workshop Logistics/Event Tasklist Timeline

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible Party</th>
<th>Recommended Date Done by CIRD</th>
<th>Date Accomplished</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify Local Resources/Recruit Volunteers</td>
<td>Workshop Team</td>
<td>Month of workshop</td>
<td></td>
</tr>
<tr>
<td>Order food, with plates, napkins, cups, utensils (NO styrofoam!)</td>
<td>![Checkboxes]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Drinks/ice (add detail)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Serving pieces</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Clean-up supplies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arrange for a timekeeper</td>
<td>Workshop Coordinator</td>
<td>2-4 weeks prior</td>
<td></td>
</tr>
<tr>
<td>Put together a package of materials to be given at registration</td>
<td>Workshop Team</td>
<td>2 weeks prior</td>
<td></td>
</tr>
<tr>
<td>Room Set-Up</td>
<td>![Checkboxes]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- ________ is/are responsible for setting up</td>
<td>Workshop Coordinator</td>
<td>1 week prior</td>
<td></td>
</tr>
<tr>
<td>- Screen</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Projector</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Laptop</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Other necessary equipment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Extension cords/surge strip</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Sign-in Sheet</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Name tags</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Agenda</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Other handouts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Sign(s) for door and tape</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Presentation back-up</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Digital camera</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Other potential materials (e.g. flip charts, easels, sticky tack, markers)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room Lay-out: Coordinate layout (# and arrangement):</td>
<td>Workshop Coordinator</td>
<td>1 week prior</td>
<td></td>
</tr>
<tr>
<td>- Whether any AV equipment is available and at what cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Who breaks down the room</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Where to put trash/recycling</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Whether someone will be on-site to open/lock-up</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Tables for projector, speakers, food/drink, sign-in, handouts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Trash receptacle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Extra chairs (find out if/where available)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Ask about parking (if it is obvious or whether there are any special directions)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Emergency contact number for facility</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix G: Community Resource Inventory

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Introduction

Individuals and organizations in your town have a lot to offer to your workshop. From skills like group facilitation to assets like meeting space or email lists, tapping into local resources will increase the impact of your effort while reducing the hard cost. The Community Resource Inventory tool will help individuals and organizations identify what assets they might be able to contribute.

When & How to Use It

The Inventory can be used for a variety of purposes:

1. Questionnaire for core workshop team members
2. One-on-one meetings with potential partners
3. Survey to individuals and/or organizations that have expressed interest contributing to the workshop

The tool is structured as a survey and can be modified for use in a group setting or in a one-on-one conversation.

The Tool

1. Begin with a description of your workshop and why you are seeking information on community resources.

Example: “Our community of ________ is asset rich in the skills, interests, work experiences and connections of local residents. This survey seeks to identify assets that individuals and organizations have to contribute to our workshop. We invite you to fill in this form and return it via _____.”
2. **Provide a checklist of skills that you need for your workshop.**

Ask the participants if they would be willing to contribute any of the following skills that you’ve identified as needs for your workshop. Possible skills include:

<table>
<thead>
<tr>
<th>Skill/Asset</th>
<th>Willing to contribute</th>
<th>Willing to teach others</th>
<th>Want to learn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications, marketing, media experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graphic design</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology development (e.g. websites, social media, blogs)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Networking and building partnerships</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic thinking</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events planning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community organizing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group facilitation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workshop specific skills (e.g. architecture, landscape design, economic development)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Create a list of assets you need.

Ask participants if they would be willing to contribute any of the following that you’ve identified as needs (in-kind or at a reduced rate). Possible assets include:

<table>
<thead>
<tr>
<th>Assets</th>
<th>Yes</th>
<th>Maybe</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting Space</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Listserv/email list</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Large format printer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tables/chairs for meetings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food/drinks for meetings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Another way to identify spaces for meetings...

- “In which location would you be most likely to attend a community meeting? Please order the following locations (1 being most likely to attend and (highest number) being least likely to attend). At the end, please list any additional spaces that you think would be ideal for a meeting that we have not listed.”
  - Have the people distributing the audit brainstorm a list of community spaces to include here.

- “Please list the spaces in our community that you think would be the most convenient and ideal for a community meeting.”

- Include a map of the community with marked spaces for meetings so the participant can visualize the setting.

4. Collect contact information.

It is essential to collect contact information from each participant. With this information the community can identify who has what skill and ultimately build relationships and connections with these people.
Now What?

As you collect this information from individuals and organizations, create a summary matrix that organizes the input:

<table>
<thead>
<tr>
<th>Skill or Asset</th>
<th>Individual with skill (willing to share)</th>
<th>Organization with skill</th>
<th>Individual willing to learn skill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create subheadings for each skill</td>
<td>Provide contact information</td>
<td>Provide contact information</td>
<td>Provide contact information</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>
Appendix H: Resource Team Planner

<table>
<thead>
<tr>
<th>Topic Area Expertise</th>
<th>Session type(s)</th>
<th>Specific skills</th>
<th>Date(s) wanted</th>
<th>First Choice</th>
<th>Alternates</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Transportation, healthy living, and/or main streets]</td>
<td>Keynote speaker</td>
<td>[Day 1 or Day 2]</td>
<td>[name]</td>
<td>[name]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Designer &amp; panel speaker</td>
<td>[name]</td>
<td>[name]</td>
<td>[name]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Small group facilitator</td>
<td>[name]</td>
<td>[name]</td>
<td>[name]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Small and large group facilitator</td>
<td>[name]</td>
<td>[name]</td>
<td>[name]</td>
<td></td>
</tr>
</tbody>
</table>

Sample Resource Team Biographies from Franklin, NH (2015)

Ariana McBride
Community & Organization Development Specialist

Ariana McBride is a planner with more than a decade of experience in community and organization development. She is the Director of Strategic Capacity Building for Ninigret Partners (NP), which is a boutique economic design firm. She focuses on community engagement, research and information design for NP. She has a private consultancy as well. Most recently, Ariana was a Senior Associate at the Orton Family Foundation where she managed demonstration workshops in New England. In this role, she designed community selection processes and trained partner communities on the development and implementation of community workshops. Ariana co-developed the Foundation’s Heart & Soul Community Planning approach, which emphasizes citizen engagement, collaborative decision making and local capacity building. She created new engagement and facilitation methods such as story based visioning, community network analysis and values based action planning.

Prior to the Foundation, Ariana worked for the Rhode Island Economic Policy Council where she focused on developing a place-centered approach to economic development. Her workshops included the One River Workshop, a collaborative initiative with the Rhode Island School of Design (RISD), which sought to advance more integrated waterfront design, and the Borderlands Workshop, which aimed to balance conservation and economic development along RI’s western border. As part of this work she coordinated educational workshops and developed a $300,000+ multi-year pilot workshop that involved over 12 agencies, organizations and funders from two states.

Ariana earned a Masters of Community Planning from the University of RI and received her bachelor’s degree in International Relations from the College of William and Mary in Williamsburg, VA. She lives in Hingham, MA with her husband, two daughters and two feisty cats.

Kennedy Lawson Smith
Founder, Community Land Use Economic Group
Kennedy Smith, a principal with the Community Land Use + Economics Group, is one of the nation’s foremost experts on economic development planning for older and historic commercial districts. Her work focuses on crafting forward-looking, innovative economic development strategies, then turning them into practical implementation strategies. Kennedy has won numerous accolades for her work, including being included in Planetizen.com’s list of “100 Top Urban Thinkers of All Time”, and being named one of “Fast Company” magazine’s first “Fast 50 Champions of Innovation”, recognizing “creating thinkers whose sense of style and power of persuasion change what our world looks like and how our products perform.” Her work has been featured in news media ranging from Business Week and The New York Times to “CBS Sunday Morning” and “The Donohue Show”. She was awarded a Loeb Fellowship at Harvard University in 2005. Before co-founding the CLUE Group in 2004, Kennedy served for 14 years as the director of the National Trust for Historic Preservation’s National Main Street Center. In addition to her work with the CLUE Group, she teaches a graduate-level course in historic preservation economics at Goucher College and writes articles for several planning and economic development journals.

Philip B. Stafford
Director, Center for Aging and Community, Indiana University

Phil directs the Center on Aging and Community at the Indiana Institute on Disability and Community, at Indiana University in Bloomington. A cultural anthropologist, Phil has been active in research, training, speaking and publishing around issues of community development for elder-friendly communities for three decades. He is a senior consultant with the AdvantAge Initiative, a national workshop that has supported community planning for aging in over 26 U.S communities and recently completed an Administration on Aging-funded statewide demonstration planning stipend for the Indiana Division of Aging. Currently he provides technical assistance to 14 awardees participating in the U.S. Administration on Aging Community Innovations for Aging in Place initiative. He is a founding board member of the Memory Bridge Foundation and the author of numerous articles on culture and dementia, participatory research and planning and the meaning of home for older people. He is the editor of a Gray Areas: Ethnographic Encounters with Nursing Home Culture, 2003, SAR Press. His new book entitled Elderburbia: Aging with a Sense of Place in America, was published by Praeger Press in October, 2009. Phil received his BA from the University of Chicago, and his Ph.D. from Indiana University.

Jennifer Wallace-Brodeur
Strategic Advisor and Co-Lead, Livable Communities, AARP Education & Outreach

Jennifer Wallace-Brodeur has been at AARP since 2005, serving as Associate State Director in the Vermont State Office until 2013, and then moving to the national office as Strategic Advisor and Co-Lead of the Livable Communities team. In Vermont, she led the state’s livable community agenda, and was an early adopter of the platform nationally. Her accomplishments include creating and leading the Burlington Livable Community Workshop, which established a vision and action steps for Burlington to meet the needs of its aging population. This was one of AARP’s first local livable community workshops and continues to be a model within the organization for stakeholder and volunteer engagement. As a statewide leader on transportation issues, Jennifer created and led a diverse transportation coalition, which brought together health, environmental, and business leaders to identify ways to expand mobility options. She also led AARP’s campaign to pass Complete Streets legislation in 2011, which earned her the Outstanding Service Stipend from the Vermont Planners Association.

Jennifer currently leads AARP’s state livable communities work, which includes the Network for Age-Friendly Communities. She led the organization’s work to create the AARP Livable Communities Great Places for All Ages website (www.aarp.org/livable), which is a go-to resource for local officials with the latest information, best practices, research, policy analysis, and funding sources that support livable communities. Prior to joining AARP, Jennifer was a political and public policy consultant for 10 years. She managed the Clavelle for Governor campaign in 2004 and consulted for the Vermont Democratic Party, as well as numerous
Communications and Participant Recruitment
Communications and Participant Recruitment

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<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
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<td>44</td>
</tr>
<tr>
<td>Participant Recruitment</td>
<td>47</td>
</tr>
<tr>
<td>Appendices</td>
<td>50</td>
</tr>
</tbody>
</table>
Communications

Your workshop will only be successful if you get people to not only show up but also to participate! While you will be making personal invitations to potential core participants, you will also have sessions of your workshop that are open to the public, and you will need to communicate with the public and with key leaders and decision-makers about what you are doing. For either your core participants or the community at large, you will need a strategy for how to best reach them and talk about your workshop effectively – this is your communications plan.

Taking time on the front end of your workshop preparation to figure this out will help you make the most of your resources, raise the visibility of your workshop, and draw more people to participate.

This plan doesn’t need to be complicated – the following steps lay out key components.


1. Set Your Communication Goals

What are you trying to accomplish when you communicate about your workshop? These goals go hand in hand with your overall workshop goals. Here are some examples:

- Secure community participation in the workshop
- Raise awareness and educate leaders on key community design issues
- Obtain financial or in-kind support for your workshop
- Generate support for workshop outcomes

2. Confirm your Target Audiences

Who do you need to reach to accomplish your goals? It’s nearly impossible to communicate well with everyone, and you’ll need to communicate differently with different audiences. That means it’s important to prioritize your audiences. Your community network analysis (described in a previous section) will help you identify key stakeholders and networks. From that work you can clarify which audiences you need to reach in order to meet your communication goals (e.g. local officials, land owners, design professionals, artists, youth, seniors, minorities).

3. Develop your Workshop Message

What do you need to say about your workshop to achieve your goals and in order to successfully reach your audiences? Messages should be clear, concise and compelling. Make sure to speak both to peoples’ minds and hearts and to approach people with messages that will be relevant to them. Stories, emotions and values can be quite powerful ways to communicate.

Check out this guide from Resource Media on how to frame your message: http://www.resource-media.org/wp-content/uploads/2013/06/Messaging_and_Delivery.pdf

4. Choose Your Communication Tactics

What specific activities will you do to spread the word? Your tactics (i.e. communication channels) should reflect the most effective ways to spread the word in your community. For some that may be the local paper. For others it may be social media. In many places it may all be about word of mouth. It’s essential that you do some thinking up front about which of the many tactics will be most effective for your community.
Communications and Participant Recruitment

Here is a summary of some key channels to consider:

- **Workshop-specific channels:** These are channels that you might create to support your workshop like a website, newsletter, email list, postcards or fliers. You may not create all of these channels; given limited time, it can be helpful to post workshop information on a page within one of the partners’ websites or get your workshop info in other community organizations’ newsletters.

- **Traditional media:** These are your local newspaper, radio and television stations. Don’t be afraid to go beyond the press release! Meet with your local reporters, write letters to the editor and get on the air.

- **Social media:** These platforms (Facebook and Twitter are known best) are a great way to connect with people who are online. Many communities also have local bulletin boards or neighborhood online networks like i-neighbors.org.


- **Community networks:** Don’t forget about the networks and non-traditional communications channels that already exist in your community. If everyone shops at one grocery store, see if they will put fliers into bags, or post to the bulletin board of the local cafe or post office. If most people are on a school or PTA listserv, ask to send announcements through their list.

- **Word of mouth:** Few things are more effective than getting a call to from a friend or neighbor. Whether it’s a personal visit, phone call, email or handwritten note – these small actions typically have a big impact on people’s interest and participation in community efforts.

**Appendix A** provides a Priority Communication Channel Exercise to help you identify the most promising tactics in your town and **Appendix B** provides some tips on working with your local media.

We also strongly recommend you listen to the recording of the Community Matters webinar on spreading the word in your community: [http://www.communitymatters.org/event/spreading-word-about-your-community-design-workshop](http://www.communitymatters.org/event/spreading-word-about-your-community-design-workshop)

Webinar Notes: [https://docs.google.com/document/d/1kw80Vu8QoStbfpI7_W_2EFiv8vLxQiAXoD7nkS4En84/edit](https://docs.google.com/document/d/1kw80Vu8QoStbfpI7_W_2EFiv8vLxQiAXoD7nkS4En84/edit)

### 5. Write Up your Communications Plan

You’ve made all the important decisions and you have all the ingredients, but don’t forget to write them all up in a single document that can be shared with team members and used to track your progress throughout the workshop.

Still have questions? We recommend Cause Communications’ Communications Toolkit for Non-Profits (and their many other resources) to help you go deeper. Their free tools offer practical and tested resources and advice in nearly every aspect of communications. [http://www.causecommunications.org/resources.php](http://www.causecommunications.org/resources.php)
## Communications Plan

<table>
<thead>
<tr>
<th>Communication Goal</th>
<th>Tactics</th>
<th>Timing</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Announce workshop and begin garnering support</td>
<td>Draft press release announcing selection as a workshop host and send to CIRD staff</td>
<td>6 months prior (at least two weeks before you plan to release it)</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Send Press Release</td>
<td>5 months prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td>Secure workshop participation</td>
<td>Send Invitation letter</td>
<td>2 months prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Confirm and organize invitation responses in a spreadsheet</td>
<td>2 months prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Send package of approved materials to CIRD for distribution to other federal partners and representatives</td>
<td>2 months prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Personal call follow-up with invitees who haven’t RSVP’d</td>
<td>1 month prior</td>
<td>Team Members</td>
</tr>
<tr>
<td></td>
<td>Community group newsletters</td>
<td>1 month prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Send thank you and teaser info out to confirmed participants</td>
<td>1 month prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Social media postings</td>
<td>Twice/week for month prior</td>
<td>Workshop Intern</td>
</tr>
<tr>
<td></td>
<td>Draft workshop flyer and press release and send to CIRD staff for review</td>
<td>at least 2 weeks before you plan to release them</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Draft pre-workshop blog post and send to CIRD</td>
<td>at least 1 week before you plan to release</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Send Press release</td>
<td>3 weeks prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Newspaper ad</td>
<td>3 weeks prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Release pre-workshop blog/press release</td>
<td>2 weeks prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Invite local press to the workshop</td>
<td>2 weeks prior</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Send confirmation email to participants with key logistics</td>
<td>2 weeks prior</td>
<td>Team Members</td>
</tr>
<tr>
<td></td>
<td>Send Workshop Packet to participants</td>
<td>1-2 weeks prior</td>
<td>Team Members</td>
</tr>
<tr>
<td></td>
<td>Send Reminder and Final Logistics to participants</td>
<td>1 day prior</td>
<td>Team Members</td>
</tr>
<tr>
<td>Generate support for outcomes</td>
<td>Draft post-workshop press release and send to CIRD staff</td>
<td>within 1-2 days after workshop</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Send Press release</td>
<td>7-10 days after</td>
<td>Workshop Coordinator</td>
</tr>
<tr>
<td></td>
<td>Letters to the editor</td>
<td>Two/month for 3 months</td>
<td>Team Members</td>
</tr>
<tr>
<td></td>
<td>Thank all participants, speakers and sponsors</td>
<td>within 10 days of the workshop</td>
<td>Workshop Coordinator/Team Members</td>
</tr>
<tr>
<td></td>
<td>Workshop Infographic Poster</td>
<td>1 month after</td>
<td>Workshop Intern</td>
</tr>
<tr>
<td></td>
<td>Share photos, outcomes and next steps with the public</td>
<td>ongoing</td>
<td>Workshop Coordinator/Team Members</td>
</tr>
</tbody>
</table>
Participant Recruitment

No matter which groups you identify as target audiences, one of the most important groups to communicate with is potential workshop participants. It’s essential to involve a diverse, representative, committed and enthusiastic group of people in your workshop, and you need to start planning early in order to ensure that you can get them.

1. Identify Potential Participants

At least four months prior to the workshop, you should begin to identify a pool of potential participants for the workshop. Start big: brainstorm many more people than you can actually invite, and narrow it down from there.

Rather than just starting with names, we suggest you identify stakeholder groups (such as “elected officials,” “PTA,” or “Oak Street residents”) that you know you want represented, determine how many slots to allocate to each, and then find names to fill them.

Approach the brainstorming process from several directions:

• **Start with your workshop goals.** Who needs to be in room in order to meet those goals (both short-term workshop goals and long-term community goals)? That might mean decision-makers (mayors, planning commissioners, planners, key business interests, heads of community development corporations, etc.). But it also might mean local funders, educators, and influential citizen leaders. Often the key leaders of a community are those who operate behind the scenes.

• **Use your Community Network Analysis.** Do you have representatives from all the key networks and stakeholder groups? Do you have a diverse group of potential participants? (think about many types of diversity: cultural, economic, political, age, geographic distribution, backgrounds and experience, and more)

• **Think outside the box.** Are there local high school students who would like to participate? How about the unusual suspects… people who would never show up at a community meeting or participate in a planning process? What about people who have different types of knowledge or skills? Are there people from neighboring towns or regional organizations who could benefit from participating and help spread the results of your workshop even more broadly?

One of the easiest ways to identify an appropriate pool of participants is to involve other organizations and community members. It’s unlikely that a single person – no matter how well connected – will know all of the individuals who should be in the room. Invite a group of people to join you in the brainstorm session, or at the very least run your draft invitation list by other organizations and partners.

If you are drawing participants from across a region, the easiest way to identify an appropriate pool of participants is to rely on other organizations to help. Contact state agencies or other groups with outreach programs, explain your workshop concept, and ask them to identify potential participants.

Possible organizations to contact include: the Certified Local Government coordinators in the state historic preservation offices, the state Main Street program, the regional offices of the National Trust for Historic Preservation, the U.S. Forest Service regional office(s), U.S. Department of Agriculture (a CIRD program partner), USDA Rural Development, Agricultural Extension staff, the State or Regional Arts Council, the network of RC&D of the Natural Resources Conservation Service, community foundations, city councillors, developers, city or county planning departments, as well as local chapter members of the American Institute of Architects, American Planning Association, Congress for New Urbanism and National Association of Realtors. Invite key state agency representatives to attend the workshop also; they can be excellent sources of information about technical assistance and funding.
2. Plan for Participants

With a draft participant list in hand, you’re ready to make some key decisions that will inform your final participant selection and your communications with participants. There are many factors to think about in making sure that your workshop will work for the people you want to include. You’ll want to work out these details before you issue invitations, and communicate about some of them in the invites.

- **Dates and times matter.** Are you including people who run businesses or have day jobs? If so, consider how they will be able to participate during week days, or schedule sessions for evenings and weekends.

- **Lower the barriers.** It’s hard for people to participate in a multi-day workshop, and for a lot of different reasons. Brainstorm what possible barriers might exist for the people on your list, and then think about how you could help to lower those barriers.
  - Inviting parents? Think about offering childcare.
  - Multi-lingual community? Find translators.
  - Busy professionals coming after work? Offer dinner.
  - Workers who can’t afford to take vacation time? Look for funding to offer a small stipend.
  - Participants without transportation? Pick a venue located centrally or offer transportation.
  - Participants traveling long distances? Offer lodging.

- Think about using facilities that are wheelchair accessible and how to accommodate people who may have trouble hearing, or seeing or experience other physical challenges.

- **Set clear expectations.** Be clear about whether you are inviting participants for the whole workshop or just particular sessions, whether you are inviting people to represent a certain viewpoint, and any other expectations you may have. *It is critical that a core group of at least 30 people participates in the entire workshop*, since the success of the workshop and outcomes depend on a continuity of participation and it is distracting to have people coming and going. You will inevitably get requests from people who would like to arrive late or skip out; decide ahead of time how to handle those expectations, but we recommend being firm about participation.

- **Decide on a selection process.** Determine whether you are inviting people outright or asking for applicants. (see “Select and Invite Participants” below). Be clear about the maximum and minimum number of participants you can have. There will always be attrition, so you may either want to initially take up to 20% more people than you want, or else maintain a backup list and approach people as others cancel.

3. Select and Invite Participants

*Plan to issue your workshop invitations 2 months prior to the workshop* (or six week at the very latest). Given that timing, plan your selection process backwards to be sure you have enough time.

There are two primary ways that past CIRD workshops have selected participants: either creating a firm participant list and issuing direct invitations, or issuing a broad call for interest and asking for “applications.” Decide which approach works best for your workshop, but aim to make sure that each participant will benefit from the workshop, contribute to the workshop, and help you meet your goals.

*Whichever approach you choose, we strongly recommend using a free event registration site such as Eventbrite to simplify the participant tracking process* (https://www.eventbrite.com). Eventbrite will allow you to pull event registration reports periodically so you can keep your attendee list up-to-date (see more information in Appendix P).
Here are a few things to think about with each approach:

- **Direct Invitations.** Your committee starts with the large list of potential participants, narrows it down to a final list, and issues direct invitations to the people you would like to have participating.
  - May be less likely to find people who are “off the radar” but would make excellent participants.
  - It can be hard to get firm commitments, or you may get people who confirm and back out later.
  - Consider having a backup list or issuing a second round of invitations after you know who is not able to attend.

- **Application Process.** You can issue invitations as broadly as you like, and then will likely want to form a selection committee to read applications and make final decisions.
  - May be more likely to result in committed attendees. If people take the time to apply, they are likely very interested in attending.
  - Can be harder to get diverse representation. You will need to work hard at outreach and selection to make sure the final group represents your target audiences.
  - You will need to create criteria for selection, have people willing to read applications and make choices. This can be time consuming and you’ll need to start early.
  - If the benefits aren’t clear, you may not get enough applications.

- **Hybrid Approach.** Allocate most of the workshop slots directly, but leave a handful open for people who just hear about the opportunity and express interest. Or allocate most of the workshop slots for strong applications, but leave a handful for people you feel are essential to have there or will help diversify the group.
  - Appendix N includes a sample invitation letter that you can customize and use to reach out to potential participants.

Regardless of how you select participants, think carefully about your first contact. If you do direct invitations, this will likely be in the form of an email or letter to an individual person. If you accept applications, this may be a press release, newsletter message or other broad communication. In that communication (or in a supplementary handout or web page), you will want to share key information about your workshop:

- What the workshop is, why it matters, and what will come out of it. (Get people excited!)
- Why their participation matters. The more you can personalize this part, the more likely people are to respond positively.
- More details on workshop logistics and fine print: when, where, who (attendees, Resource Team, and organizers), what (what CIRD is and what the workshop will be like), why (what will this do for your community?)
- Expectations around participation and time commitments
- Clear process for responding and a deadline to accept or pass. Consider using an online form for people to register and easily send you their contact info, a short bio or photo.
- Give attendees a final deadline of no later than 2 weeks before the workshop for final confirmation.

4. Communicate with Participants

Plan to communicate regularly with participants after you first contact them. Once they accept a slot, you’ll want to follow up with them before the workshop to send more information, confirm attendance, and likely send an agenda and prep materials the week before, including the Workshop Packet (see next section). If invitees are unable to accept, you will still want to communicate with them to share results and perhaps ask for their help with follow-up steps. Be sure to include these communications in your communications plan.
Appendix I: Prioritizing Communication Channels

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This exercise will help you identify which communication channels reach people in your community. If you completed a Community Network Analysis (CNA) have it on hand as a reference.

1. Create a matrix with all of your workshop’s priority participants listed down the left side and all your town’s communication channels listed across the top. (If you completed your CNA you’ll have a start on this information already).

2. For each priority audience make an “X” for the communication channels they most use.

3. Count up the tallies for each communication channel to see which are most used by your priority audiences. The final result of this exercise should be a table like the one below.
## Appendix I: Prioritizing Communication Channels

<table>
<thead>
<tr>
<th>Priority Participants</th>
<th>Traditional Media</th>
<th>Electronic Media</th>
<th>Gathering Places</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>KCB Radio</td>
<td>Facebook</td>
<td></td>
</tr>
<tr>
<td>Main Street Business Owners</td>
<td>X</td>
<td></td>
<td>X – Chamber Listserv</td>
<td></td>
</tr>
<tr>
<td>Mill Street Families</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Artists</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Tea Party</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Americans</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Youth</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix J: Tips for Working with Traditional Media

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✓ Get to know your local media
  • Build a media database with contact names and keep it current
  • Meet with them to build personal relationships
  • Care about their needs (e.g. deadlines, photos, ads)
  • Know the best way to communicate (e.g. phone or email)

✓ All pitches to the media should offer a hook... and a photo, if possible
  • What’s the news? What’s the new angle on same story?
  • Some ideas:
    » New study/report/ announcement
    » Event/anniversary
    » Trend
    » Localize a national story
    » Human interest story
    » Fresh angle on old story
    » Profile of fascinating person
    » Celebrity involvement

✓ When a reporter calls you: Stay in control of your message; use talking points
  • Call back later, if necessary, to prep yourself or a spokesperson for an interview
  • Be prompt. Reporters are on deadline

✓ Put together a Press Packet – it can be more effective than a single press release (see next page)

✓ Don’t forget to write Press Releases: lots of resources for how to write these online

✓ Choose a Spokesperson(s) that will relate to your audience.
  • Make sure they practice
  • Think about how to use them for:
    » TV and radio interviews for news, PSAs, commercials
    » Interview shows on TV, radio, access
    » Public appearances at social clubs, events, etc.

✓ Go for earned media
  • Opinion editorials, commentaries, letter to the editor (LTE)
  • Engage allied individuals & writers to contribute
  • Make op-eds part of your communications strategic plan
  • Plan ahead! For what activities? Monthly? Weekly? What topics?

✓ Track your media coverage
  • Create a database where you can note the topic, date and reporter
  • Don’t forget about LTEs

✓ Evaluate coverage

Media/Press Packets

When introducing your organization to members of the press, in person or not, a physical press packet can be helpful and more powerful than a single press release. Typically a packet (or press kit) consists of a pocket folder with the name of your organization on the cover. Make sure the content is relevant to the news you want covered.
Content can include:

- Brochure(s)
- Press Release(s)
- FAQ or Fact Sheet
- Contact sheet and/or business card
- Past Press Coverage
- Quote sheet (What are people saying about you?)
- Photo (5 x 7 or larger) or clarity about where one can find photos & images
- Bios
- Maps
- Workshop list or History

The same content you provide in your packet should be replicated online with additional material, including earlier press releases, high resolution photos and published media articles and stories.

Many organizations also use their press packet for potential funders, sponsors, or other deeply interested parties.

Sample:

Communications and Participant Recruitment

Appendix L: Press Release Announcing Selection - Sample from Alton, MO (2014)

Food producers, artisans co-op in Alton to host rural design workshop

The Oregon County Food Producers and Artisans Co-Op (OCFPAC) in Alton is one of four organizations selected from entries around the country to host this year’s rural design technical assistance workshops sponsored by the Citizens’ Institute on Rural Design (CIRD). In the announcement made Wednesday officials with CIRD said, “The workshops bring together local leaders, non-profits, community organizations and citizens, and a team of specialists in design, planning, community and economic development, and creative placemaking to address design challenges identified by the host community.”

OCFPAC operates in a small building on The Square in Alton serving fresh, locally sourced meals and providing a means of sharing the foods, crafts, skills and knowledge of the residents of Oregon County and the surrounding area. The shop sells handmade and homegrown goods. It is open 9 a.m. to 5 p.m. Tuesdays and Thursdays, serving “pay as you can” lunches and 10 a.m. to 3 p.m. Saturdays. CIRD officials said, “The OCFPAC workshop will guide the renovation of one (in a series of) vacant buildings located on the town square into a multi-destination market and community center to serve as an economic incubator for artists and food producers in the county.”

Asked about the specifics of the workshops, OCFPAC Workshop Steward Rachel Reynolds Luster, who submitted the proposal to CIRD, said, “I had followed the Citizens’ Institute On Rural Design for some time. One day while working on the layout for our small garden in the back of the co-op with members, I flippantly said, ‘What I really wish is that someone would buy us that and we could tear it down and build a real community space,’ referring to the vacant and rotting bar next to our market and community center.

“To my amazement, one of our members, Polly, said, ‘I can make that happen.’ So, we began thinking and talking about whether taking on this workshop was feasible for us as a group. I thought that the CIRD workshop would be a real opportunity for us to bring in specialists who could help us in developing a plan. I also knew that if we got it, which was a long shot in my mind, we could bring these resources to everyone in the county (population 10,997) because population size was only limited to communities under 50,000.”

She said the workshop involving the vacant building is still in the decision-making phase. “The design experts will be able to answer many of the questions we have before finalizing the decision. But the plan would be to tear the building down. It’s not structurally sound and is really beyond repair. The idea, so far, has been to put up a steel building that would efficiently function as the market, community kitchen and community center. We would put a facade on that similar to an old time general store with a porch and recess that building back on the lot. We would create an edible landscape that would front the building on The Square.”

Selected from a pool of 48 applicants by an advisory panel, the other 2014 workshop hosts are:
- Carl Small Town Center, Houston Community, Mississippi;
- Lincoln and Lancaster County Planning Department, Lancaster County, Nebraska; and,
- University of New Hampshire Cooperative Extension, Franklin, New Hampshire.

“Each of the selected organizations applied with multiple local partners. We were extremely impressed by the volume and high quality of the applications we received. The selected communities demonstrate rich potential for leveraging partnerships to take action on a wide range of rural design issues,” said CIRD Program Director and Senior Vice President of Workshop for Public Spaces, Inc. Cynthia Nikitin. “Rural design is a valuable tool for citizens to use to build on existing assets and improve their community’s quality of life and long-term viability.”

Luster said, “Workshop for Public Spaces, one of the partnering sponsor organizations, specializes in designing public or community markets across the country and internationally. Their enthusiasm regarding working with us has been phenomenal. I just can’t wait to host this for our communities.” She said no date has been set for the workshop, but it will be within the next few months.

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Appendix L: Pre-Workshop Press Release - Sample from Lancaster County, NE (2015)

Rural Design Workshop Engages Local Leaders and Residents to Shape Change in Lancaster County

Three Day My Town, Lancaster Program Brings Design Techniques and Resources to Small Towns

LINCOLN, Ne. (March 9, 2015)—Lancaster County was selected in July 2014 to host a community workshop as part of the Citizens’ Institute on Rural Design™ (CIRD), a national program sponsored by the National Endowment for the Arts. The My Town, Lancaster County workshop takes place March 19th - 21st, in Lincoln, NE, and will convene residents and stakeholders from 12 small towns around Lancaster County.

For the past 22 years, the Citizens’ Institute on Rural Design™ (CIRD) has been providing facilitated planning workshops to help communities generate locally driven solutions to pressing design challenges. CIRD convenes local leaders, non-profit organizations, and residents together with a team of specialists in design, planning, historic preservation, place branding, and rural community revitalization to work together with local partners to recognize their own potential and collective capacity to implement change, recapture their sense of place, identify and build upon their unique assets, and retain their small town character.

The three-day workshop will address the challenges and opportunities afforded to small towns in Lancaster County, a County dominated by the City of Lincoln. Focusing on important aspects of community spirit and integrity, the workshop will create a toolbox of design techniques and resources to help communities recapture their sense of place and identity. The final day will include an open house and presentations to residents of the 12 participating communities.

The public is invited to join workshop participants for a presentation by Ed McMahon of the Urban Land Institute. McMahon will share his Secrets of Successful Communities and provide examples of how communities can grow while also preserving what they love. The presentation, will be followed by a reception hosted by the Nebraska Chapter of the American Planning Association. Thursday, March 19 at 5:30 p.m. at the Jackie Gaughan Multicultural Center, 1505 S Street, in the Unity Room on the 2nd floor.

The public is also invited to join workshop participants as they share results of their discussions and next steps each town will take to reach their goals and contribute to their plan of action. An open house and poster presentation will begin at 1:00 p.m. on Saturday, March 21 at the Spring Creek Prairie Audubon Center, 11700 SW 100th Street, just two miles south of Denton.

If you are interested in learning more about the My Town, Lancaster County workshop, please visit:
- www.lincoln.ne.gov Keyword: My Town,
- Our Facebook page at https://www.facebook.com/mytownlancaster, or call 402-441-7491 and ask about “My Town”.

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Appendix M: Sample Invitation Letter - from Lancaster County, NE (2015)

Use the following letter as a template for drafting your own workshop invitation letter:

Date

Address
Addressee

Dear _____:

I am writing to invite you to attend a very exciting workshop that will help Lancaster County residents, decision-makers, and organizations gain the tools, knowledge, and skills to address their communities’ challenges, and build upon their unique assets to make them better places to live, work, and play.

Lancaster County was recently selected to host a community workshop as part of the Citizens’ Institute on Rural Design™ (CIRD), a national program sponsored by the National Endowment for the Arts. The My Town, Lancaster County workshop takes place March 19th - 21st, in Lincoln, NE, and will convene residents and stakeholders from the small towns of Lancaster County.

In Lancaster County, small towns and villages face unique challenges, including strengthening community identity and maintaining their vibrancy in the shadow of a major city. At the same time, the amenities available in proximity to Lincoln—including an airport, major shopping centers, top-tier health care, and major educational institutions—also serve and are of benefit to the surrounding small towns. Taken together, these factors impact the economic vitality, physical design, and sense of place of these communities. The My Town, Lancaster County, workshop will focus on strengthening important aspects of community spirit and integrity: community identity, balanced economic development, and public engagement.

We are currently assembling a diverse group of 40 local people to participate in the workshop, work with us to identify strategies for addressing these challenges, and create a plan for the future. We are committed to engaging a group that represents a diversity of professions, backgrounds and interests and you were suggested as an ideal participant because of your involvement and interest in your community.

Because the workshop is cumulative, and because much of the success of the workshop depends on group interaction, we strongly request that participants commit to attending the entire workshop from beginning to end.

We’re designing a highly interactive workshop that will involve significant participation from and collaboration among all attendees. See attachment for maps and session notes.

Workshop Content: The workshop begins Thursday evening March 19th with a public lecture by Ed McMahon of the Urban Land Institute beginning at 5:30pm. Mr. McMahon will share his insights on the topic of rural development and how it applies to the smaller communities of Lancaster County. The lecture will be followed by a dinner and introduction to the workshop.

The workshop sessions on Friday the 20th will include an appreciative inquiry session with all the participants,
and a series of short presentations on community planning, community involvement, and Placemaking, presented by local and national professionals. These sessions will be followed by a lunchtime “virtual tour” of small towns in Nebraska that have a history of successful community development. The afternoon includes two panel discussions with professionals from the fields of economic development and resource provision for rural communities.

The sessions on Saturday March 21st include sessions on developing new leadership in rural communities; strategies for increasing public participation; Lighter, Quicker, Cheaper strategies for workshop implementation; and identifying actions for moving forward. This will be followed by a working session allowing participants time to prepare for a poster presentation, which will be open to the public at 1pm.

Throughout the 3 days, participants will be encouraged to dream about the futures of their towns and identify opportunities for developing intra-county partnerships with neighboring towns.

Resource Team: An excellent Resource Team of nationally renowned speakers and advisors will lend their knowledge and expertise, including:

• Ed McMahon, Senior Resident Fellow at the Urban Land Institute;

• Don Macke, Co-Founder and Director of the Center for Rural Entrepreneurship;

• Cynthia Nikitin, Senior Vice President at Workshop for Public Spaces;

• David Nelson, Workshop Associate at Workshop for Public Spaces;

• Milan Wall, Co-Director of the Heartland Center for Leadership Development;

• Deborah Drbal, Nebraska State Director at the USDA;

• Greta Leach, Affiliated Fund Development Coordinator at the Nebraska Community Foundation

Workshop Venues: Thursday, March 19th, 5:30 – 7:45pm: The Jackie Gaughan Multicultural Center on the University of Nebraska Lincoln City Campus, Unity Room, 1505 S Street, Lincoln, NE

Friday, March 20th, 8:30 am to 5:30pm: Lancaster County Extension offices, 444 Cherry Creek Road, Lincoln, NE

Saturday, March 21st, 8:30 am to approximately 2:00pm: The Spring Creek Prairie Audubon Center, 11700 Southwest 100th Street, Denton, NE

We are very excited about this opportunity and hope that you will be able to join us for the workshop! If you are available to attend, please RSVP by [insert date] on Eventbrite [include registration page link], calling [phone] or email me at [email]. Registration is required but there is no fee to participate. Meals will be provided.

Sincerely,

[Workshop Coordinator], [Title]
Appendix N: Workshop Flyer - Sample from Thomasville, GA (2016)


In October, a resource team will design a better park based on your ideas.

Share your ideas about amenities, play equipment, creek preservation & beautification.

ways to participate

10/26 Wed. 7-8 p.m. “Live Better, Design Better”
Dr. Richard Jackson, Center for the Arts

10/27 Thurs. 6:30-8 p.m. Kick-off Activities
THS Scholars Academy

10/28 Fri. 6-8 p.m. Step up to the Tailgate Party
THS Stadium, stop by before the game

10/29 Sat. 5-6:30 p.m. Final Brief, all-in on ideas
Center for the Arts

Dr. Jackson co-authored a book and hosted a PBS series, *Making Healthy Places*. The next three nights are built for idea-sharing. Drop in.

more info:
227-4118
City of Thomasville facebook page.
Communications and Participant Recruitment


We are creating a plan to transform MacIntyre Park and we need your help.

M A C I N T Y R E P A R K

Come out on Thursday, October 27, at the THS Scholars Academy from 6:30 – 8:00 p.m. to share your ideas.

- play equipment
- new trails
- bike stations
- outdoor learning labs
- creek restoration
- public artwork

For more info on all events:
227-4118
City of Thomasville facebook page

News Flash!
A city designed to move builds healthier individuals, children and workers. Our city parks are getting ready to be your recreation destinations.

MacIntyre Park is first and we want your wish list.

Ways to participate
Wed. Oct. 26 7:00 – 8:00 p.m. Center for the Arts - “Live Better, Design Better” author Dr. Richard Jackson
Thu. Oct. 27 6:30 – 8:00 p.m. THS Scholar’s Academy, Multipurpose Room - Kickoff activities
Fri. Oct. 28 5:00 – 7:30 p.m. MacIntyre Park, adjacent to THS Stadium - step up to the Tailgate Party
Sat. Oct. 29 5:00 – 6:30 p.m. Center for the Arts - Final Brief all-in on ideas! Not to miss!

Look for student-built Adirondack Chairs beginning Oct 14 – more info at these community locations

As you bring new ideas, a team of professionals will incorporate them into a buildable plan.

The City of Thomasville created a comprehensive package of flyers and visuals for their workshop. The workshop communications materials had a unique identity and used a unified visual language, colors, fonts, and logos. Door hangers (top left), flyers (top right), workshop schedule mailing slips (bottom) and posters (previous page) were used in the communications and outreach plan to reach as many diverse participants as possible.
Appendix O: Event Registration Information - Participant Tracking

Eventbrite allows you to pull regular registration summary reports so you can keep an up-to-date participant tracker. Cross-reference these confirmed participants with your invitation list so you can track who needs to be followed up with. This participant list will also be helpful as you work out workshop logistics and refine your communications and outreach channels throughout the workshop planning process (i.e. Do you still need more representation from a particular field or more age/gender/sector diversity?).

At a minimum, be sure to request the following information on the event registration form. You may also want to request additional information from registrants, such as special needs or dietary restrictions, depending on the specifics of your workshop.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
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Coordinator’s Manual
60
Preparation of Workshop Materials
Preparation of Workshop Materials

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Workshop Packet Preparation

In order to prepare participants and Resource Team members to hit the ground running, CIRD compiles Workshop Packets for each workshop. Workshop Packets contain important background and briefing materials that should be read by participants ahead of time, information and context about the CIRD program and the importance of rural design, information on logistics, biographies and contact information, and any forms and materials that participants will need for the workshop.

Compiling and producing Workshop Packets is a joint effort between the Workshop Coordinators and CIRD staff, with review and approval by NEA. CIRD will provide a final, formatted document to the Workshop Coordinators (in digital form) for distribution to workshop participants.

It is important to begin compiling workshop materials at least two months before the workshop and plan to distribute them to participants at the workshop.

3. Producing and Reviewing Workshop Packets. CIRD staff will compile all materials into a document and complete formatting, but Coordinators will also be involved in helping to review materials. After first review, there will be an opportunity to make final minor changes, such as last minute edits to workshop participants or agenda. All Workshop Packet materials should be sent to CIRD staff at least three weeks before the workshop. The Workshop Packets will be submitted at that time to NEA for review.

4. Distributing Workshop Packets. Workshop hosts take responsibility for distributing the Workshop Packets at the workshops. Hard copies must be printed by the Hosts and handed out at the workshop to participants in a two pocket folder or stapled together into a packet.

Workshop Hosts are responsible for:

- Drafting a list of materials they would like to include in the Workshop Packet. A final table of contents will be created through discussion with CIRD staff.
- Providing CIRD with high quality digital images and files for all content provided by workshop hosts. These should be uploaded to the Dropbox Folders created for each host community.
- Reviewing a draft of the Workshop Packet
- Printing and distributing the Workshop Packet to workshop participants and Resource Team members
- Adapting and distributing any content desired for public sessions

CIRD staff is responsible for:

- Compiling all content and formatting a final document

1. Production Process & Responsibilities

The Workshop Packet production process includes four main phases:

1. Drafting a Table of Contents. During this phase, Workshop Teams should brainstorm what materials they would like to include in the Workshop Packet to provide the most relevant and important background information, bring participants up to speed, and supplement workshop sessions. CIRD will work with Coordinators to finalize a table of contents. This process should be completed two months before the workshop date.

2. Compiling Content. Both CIRD staff and local Workshop Teams will work to gather and/or produce the materials for the Workshop Packet in digital form. This process should begin as soon as the agenda is set and be completed at least six weeks before the workshop date, though final changes to participant lists and agendas may come later.
Preparation of Workshop Materials

• Obtaining content from workshop Resource Team members
• Managing the Workshop Packet review process with Workshop Hosts and NEA
• Providing a final digital Workshop Packet file to Workshop Hosts

Someone on your Workshop Team will need to coordinate collection of all the materials for the Workshop Packet on your end. This person will need to be particularly strict about deadlines for submitting materials. Workshop teams should feel free to alter materials to suit the style and format of the Workshop Packet and your audience.

2. Workshop Packet Format and Content

The Workshop Packet is the primary vehicle for delivering logistical and technical information about the workshop and will be used by each participant throughout the event.

CIRD staff will help Hosts finalize a table of contents and organize the content into sections, as appropriate. CIRD will also compile all resources into a single, high-quality digital PDF file laid out in InDesign. The format can easily accommodate maps, images, documents, and links. We will create a document that can be shared digitally or in print.

Required items include:

(Parentheses indicate who will provide)

• Welcome letter from NEA (CIRD)
• Background on CIRD and program partners (CIRD)
• Agenda with details (times, location, duration) of all workshop activities and sessions (Host)
• Information on workshop logistics, including locations of sessions, meals, venues, contact info, expectations, etc. (Host)

• Bios and photos of the Resource Team members (Host)
• Bios and photos of other speakers or facilitators (Host)
• Links to articles and other resources from the Resource Team members (Host)
• Links to articles and background reading on key workshop topics or design challenges (CIRD/Host)
• Workshop evaluation form (CIRD) - Will be provided online via Google Forms.

Suggested items include:

(All to be gathered or provided by the Host; CIRD may offer suggestions or help brainstorm.)

• Welcome letter from Workshop Host, Mayor, Partners, or other local officials
• Local news articles about the site, workshop issue, or previous relevant planning and design processes
• Previous reports or plans informing the workshop issue or site
• Maps, drawings, photos, or illustrating the site or design challenge
• Links or descriptions of local resources for planning, design and implementation (if known)
• Detailed session descriptions, small group breakouts and other workshop content (as needed)
• Acknowledgement or thank you to sponsors and workshop hosts

All resources, articles, reports and other documents should include a clear source, date, web link (if applicable) and copyright information (if applicable). Documents and pages should also include space for CIRD to add logos, footers and page numbers; ½ inch should be adequate.
When you produce and request documents, consider whether or not you plan to print the Workshop Packets in color. Color printing can be extremely expensive, so consider requesting and generating mostly black and white materials.

Hosts should provide all files to be included to CIRD in digital format. Microsoft Word or Excel files are preferred for documents; PDF files may be acceptable. All images and graphics should be provided in .jpg, .png, .pdf or .gif formats with a minimum resolution of 350 dpi.

3. Distribution Process & Responsibilities

Consider the most effective way to share the Workshop Packets with your workshop participants, based on communication channels, use, and budget. At a minimum, hard copies of agendas, Resource Team bios, area maps, and workshop exercises should be provided to every participant.

Digital copies are likely to be large files, so it may be impossible to simply email PDF files. Consider hosting the Workshop Packet on your website and sending participants a link, or using a free file sharing service like DropBox or YouSendIt. We also recommend adding the Workshop Packet to your town’s website to reach a wider audience.

We recommend printing a minimum of your actual participant total + 10 (i.e. 50 total for a workshop with 40 participants). In addition to participants, you will need copies for Resource Team members, speakers, special guests, and CIRD. Some institutions have produced up to 100 Workshop Packets in order to have a supply for later distribution.

Plan the final distribution process and timeline based on your delivery method as well. If you plan to print hard copies and mail or deliver them, you will need to build in extra time for shipping, printing, and assembly. Resource Team members should receive Workshop Packets no less than one week before the workshop (and ideally earlier).

If you’ve ever hosted any kind of event, you know that it is essential to map out what you will need well ahead of time. Begin assembling, gathering and organizing supplies as early as possible, and prepare plenty of extras and backup materials. Being proactive and organized about supplies can save you time and money and avoid inconveniencing participants (and Hosts) during the workshop.
Workshop Materials and Equipment

1. Draft a Master List of Materials, Equipment and Support

Start by creating a comprehensive list of everything that will be required for your workshop, from space needs (tables, chairs, rooms) to office supplies (scissors and sticky notes), food and beverages to tech equipment and reference materials.

Use or adapt the materials planner in The Workshop Preparation Checklist to plan everything you need for your workshop. Here are a few quick tips for success:

- **Always bring extras!** You are guaranteed to lose or break something, or need more than you planned for.
- **Test and practice.** This includes everything, from workshops and tech equipment to folding tables and easels. If you are borrowing equipment, get it well in advance so that you can be sure it works and be sure you know how to use it.
- **Bring the store.** Pack an “extras” bin with all sorts of things that might come in handy, even if you don’t plan to use them. Office supplies like sticky dots, post its, paper, markers, etc. are especially important. Consider whether you will provide participants with pens and notepaper or whether you will ask them in advance to bring their own.
- **Check your venue.** Find out specifics about the site, such as room layout, locations of outlets, on-site overnight storage space, any rules about things you can or can’t do (e.g. tape things to walls) or bring in, and what’s already available on the premises.
- **Organize and label.** Spending a bit of time organizing, labeling and tracking supplies will save you a headache later – especially if you are borrowing or renting materials or need multiple items for different breakout groups.

Label cords and equipment with plastic ties or sticky labels, and keep a master list of where everything came from. Pack a separate box of supplies for each group if you are breaking out and need separate kits.

- **Plan for the worst.** Chances are you won’t need it, but anticipate all the potential problems that could occur and come up with a backup plan (from a key staff member getting sick to a projector dying in the middle of a presentation).

If you are planning on soliciting in-kind contributions of food, equipment, and materials, start with your comprehensive list of all materials that will be required. Begin reaching out to people to secure these items one to two months before your workshop. Be creative about local businesses or organizations that could loan or donate materials for free, so that you can minimize rental fees and purchases.

2. Reference Materials

Workshop Hosts should gather and prepare necessary reference material for use during the workshops. Think about documents and visuals that might help participants better understand the site, the design challenge in question, background data, local or regional context, or past planning and design work. If your workshop site has wireless, consider posting all materials online and allowing participants to access via a computer during the workshop, instead of or in addition to paper copies.

**Reports, Plans & Background Reading**

Materials in text form may be the easiest to gather and share. Start with the local Planning Department and Development agencies and gather copies of key reports, plans and other guiding documents. Don’t stop with reports related to your specific site or design challenge, but also consider other issues, locations or scales that will influence your workshop.
In some cases, you will only need to have one copy of each document on hand for reference. If the document will be useful to small groups or during breakout sessions, produce a packet for each group with copies of all relevant documents.

Maps & Visuals

Much of your material may be spatial (maps, photographs, plans, diagrams). For example, if your workshop addresses design for a specific site, consider printing large site maps and aerial photographs with different resource overlays, including: a topographic map, land use map, zoning map, and a cultural and natural resources map. Additional maps or plans may be provided to support specific design problems, such as subdivision plans or downtown maps. Truly useful maps can be expensive and/or time-consuming to procure or produce, so identify what you need early on and start exploring sources. Existing maps may be available from your local planning office, but if you need custom GIS maps created, that will take time. It is especially helpful to have large versions available for workshops, so consider whether you can print large copies for the walls or scan maps to have available for working on screen. If your town does not have a GIS department, contact county or regional planners, university GIS departments, or even the state to ask for assistance.

In addition to large-scale base maps, smaller site-specific maps and other drawings may be required for particular design problems (i.e., a subdivision for housing). These maps should be referenced for content on the larger maps and should include all information relevant to the problem, such as existing buildings, roads, topography, and vegetation, and be printed at an appropriate and workable scale. If possible, they also should include building footprints, sidewalks/curbs, street lane markings, parking lots, and key environmental features. These should be printed at a scale of 1:100 or 1:50 so that people can draw on them, circle key areas, and make notes.

Maps from Google Earth, Google Street view and other online resources are also acceptable. Photos of the key sites, and aerial photographs hung on the wall are also helpful as people can reference them.

Data

Inventory data can be essential in helping workshop participants make informed choices and identify successful strategies. Depending on your workshop, useful data might include population and demographic information, economic data, transportation or housing information, natural resources inventories, or arts and cultural indicators. Start with local government offices such as town and county clerks, tax departments, planning and zoning departments, and highway departments. State and federal agencies are also good sources, including the Census Bureau. For example, “My Congressional District” is an online tool from the U.S. Census Bureau, which provides quick statistics from all 435 congressional districts across the country. Other sources may include local non-profits or businesses, or state, regional or university centers.

3. Workshop Equipment and Materials

Use the materials planner in The Workshop Preparation Checklist to identify all the materials that you may need for your workshop. This planner includes materials commonly used in this type of workshop, but there may be items on that list that you do not need, or items missing that you do want to have.

Meeting Room

Get to know your meeting spaces, especially the general session room. You should bring in everything you need, or confirm with the host facility that it will be available. Check for adequate lighting (or adequate shades/blinds for showing slides during daylight) and acoustics, and examine the seating arrangement for distances and sightlines.
to projection screens. Also, if equipment needs to be moved from one location to another, consider how it will be moved, when, and by whom. Finally, don’t forget to check built-in facilities in general session rooms and breakout rooms, with attention to locations and number of electrical outlets. Rooms should be equipped with tack-up boards or tack strips, and chalkboards or easels brought in if tack-up boards or strips are not available.

**Audio-Visual Requirements**

Think about everything you will need for all spaces and session types. If you have concurrent sessions running, be sure you have enough items for all concurrent sessions. Visit the venue and be sure your equipment will work for the space – both big items and small things like extension cords. At least 1 day before the workshop, set up and test your equipment under the conditions (day light, double projections, etc.) in which they will be used.

**Presenter & Session Needs**

Contact all of your Resource Team members, presenters and facilitators at least 1 month before the workshops to ask them about any materials and supplies they need for their sessions, including audio requirements (if their presentation includes audio like interviews) or access to the internet. Tell presenters about the space, the supplies and equipment you have available, and any procedures you want them to follow (such as using a provided laptop vs. their own). You may find it helpful to share photos of the meeting space. If you anticipate having graphic or design sessions, provide adequate design materials for each group as well, including tracing paper, engineer’s scale, drafting tape, high quality pens and markers. If you are planning for breakout groups, consider which materials can be shared and which materials you need for each group. If possible, organize those ahead of time into a box or bag for each group.
## Appendix P: CIRD Workshop Packet Preparation Timeline

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible Party</th>
<th>Recommended Date Done by CIRD</th>
<th>Date Accomplished</th>
</tr>
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<tbody>
<tr>
<td>Develop Workshop Packet Table of Contents</td>
<td>Workshop Coordinator</td>
<td>2 months prior to workshop</td>
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</tr>
<tr>
<td>Request all Informational Materials from RTMs</td>
<td>Workshop Coordinator &amp; CIRD</td>
<td>6 weeks prior</td>
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</tr>
<tr>
<td>Table of Contents Finalized</td>
<td>Workshop Coordinator &amp; CIRD</td>
<td>1 month prior</td>
<td></td>
</tr>
<tr>
<td>Collect, organize, share all materials with CIRD</td>
<td>Workshop Coordinator</td>
<td>2 months prior</td>
<td></td>
</tr>
<tr>
<td>Final Revisions with CIRD</td>
<td>CIRD/Coordinator</td>
<td>2 weeks prior</td>
<td></td>
</tr>
<tr>
<td>Send Final Notebook to Hosts</td>
<td>CIRD</td>
<td>1 week prior</td>
<td></td>
</tr>
<tr>
<td>Print Workshop Packets and agendas</td>
<td>Workshop Coordinator</td>
<td>1 week prior</td>
<td></td>
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</table>
Appendix Q: CIRD Workshop Preparation Checklist

REFERENCE MATERIALS:
- 8 x 10 Photos of sites shared to hang on the walls or use during breakout sessions
- Base maps or aerial photographs to hang on the wall (2 to 4, 36” x 48” or larger if possible)
- Copies of background materials included in the Workshop Packet
- Copies of relevant reports, documents, plans or articles to share

WORKSHOP VENUE:
- Room set-up and furniture confirmed (e.g. round tables or movable chairs)
- Podium or stage
- Shades to darken windows (if necessary)
- Wireless Internet & passcodes available
- Signs for rooms, directions and welcome
- Refreshments
- Plates, food, cups, napkins, silverware, trash cans

AV & TECH:
- PowerPoint workshop with all cables
- Extension cords
- Flash drives with backup copies of presentations
- Laptops for presenting (with presentations pre-loaded)
- Screen (the larger the better: for more than 75 people need a screen about 10-12 feet wide – 3-4 meters)
- Microphone (depending on room and audience size)
- Blank CDs and/or flash drives
- Pointer

REGISTRATION TABLE:
- Registration materials (anything essential to have in hard copy, or not included in Workshop Packets)
- Workshop Agenda
- Name tags
- Sign-in sheets
- Pens
- Host & sponsor promotional materials
- Breakout group lists and assignments
- Copies of agenda and logistics
- Names and contact info for all key contacts, suppliers, staff
SESSION MATERIALS & GENERAL SUPPLIES:

- Flip charts
- Easels
- Masking tape
- Paper clips or binder clips
- Thumbtacks
- Post-it (sticky) notes
- Dots
- Worksheets or templates
- Pens or pencils
- Butcher paper or newsprint
- Markers
- Blank office paper and notepads
- Scissors
- Resource Team/Facilitator requests
- Camera
- Video camera
- Petty cash (for last minute needs)

DESIGN & DRAFTING MATERIALS (per group):

- 1 roll of 24” wide tracing paper (trash, trace, canary)
- 1 engineer’s scale
- 1 roll of drafting tape (similar to masking tape)
- 2 fine-nib black felt-tip pens for each break-out group
- 2 fat-nib black felt-tip pens for each break-out group
- 1 set of large chisel-point colored magic markers (Berol, Pantone, AD) in at least 8 colors (red, blue, two greens, orange, brown, yellow, medium gray)
- 1 easel and large (24”x 36”) flip chart or pad.

SUPPORT & STAFFING:

- Translator(s) (if needed)
- Registration table staff
- Photographer
- Videographer
- Note taker
- Facilitator(s)
- Setup/cleanup crews
- Gopher (to help with any needs, such as last minute printing, tech support, participant requests)
- Tech support
Post Workshop Follow-Up Tasks
Post Workshop Follow-Up Tasks

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<td>Appendices</td>
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Post Workshop Follow-up Tasks

The workshop is done, but it’s not over yet! In order to capitalize on the energy and momentum generated by the workshop, it’s essential to follow up with attendees, Resource Team members and the broader community quickly with a set of next steps and actions. $5,000 of the total $20,000 budget should be used to fund and support follow-up activities.

Some follow-up steps may be clear from the workshop (see below); others may require conversations with your Workshop Team and stakeholders. Depending upon the situation, follow up steps might include:

- disseminating the results of the workshop to a wide audience through social media, local newspapers, website, etc.
- conducting follow up public meetings
- holding meeting with elected officials to share the workshop outcomes (if they were not in attendance)
- identifying and inviting speakers to provide additional information on specific design issues. This could take the form of a lecture or a discussion forum or a follow up workshop
- thoroughly evaluating and prioritizing actions identified during the workshop
- forming action teams or identifying partners to lead specific initiatives
- finding funds to start implementing ideas
- planning some programmatic “lighter, quicker, cheaper” changes and experiments identified during the workshop

Involve as many workshop participants as you can in this follow-up work so that you can keep people engaged, spread the work across many shoulders, and reap the benefit of many brains and hands working together towards a focused purpose. Think about planning for how you will tackle these follow up tasks well before your workshop.

CIRD and CommunityMatters will offer three more webinars following the workshops to guide you in securing funding, identifying quick action steps and creating organizational capacity to manage the process of moving forward.

In addition to the forward-thinking post-workshop planning, some basic housekeeping items should be tended to within one to two weeks after your workshop. For a recommended timeline for completing the tasks cited here, see the CIRD Post-Workshop Report and Evaluation Check-List and Timeline at the end of this chapter.

1. Thank You Notes

Thank you notes are a considerate and much-appreciated nicety, but, they are also one of the best ways to leverage and solidify new relationships, touch base about necessary actions, and ensure the ongoing commitment of and your appreciation for the participation of the recipient. The general rule of thumb with thank you notes (and most communications) is that the more personal you make them, the better they are, and the more likely you are to win ongoing or future support. Plan for that time before your workshop begins and include sending “thank yous” in your overall communications strategy. Consider making these even more meaningful by putting together a quick digital slideshow or video of photos from the workshop and sharing it along with your notes.

Within ten days of the conclusion of the CIRD workshop, you should send thank you letters to the Resource Team members, guest speakers, volunteers, sponsors, and anyone else who assisted or was substantively involved in the workshop. Even associates with whom you work closely and regularly should receive a thank you note for their participation. Consider also sending thank you notes to everyone who participated in the workshop. Sometimes thank you notes can do double duty: consider including a report or summary, next steps, a reminder about completing the workshop evaluation and/or an upcoming meeting or action,
or a link to a website or news story to remind people about the great work that was done.

2. Workshop Evaluation

Evaluation forms will be developed in advance by CIRD staff, and will provide workshop participants with the opportunity to provide feedback on the workshop itself. CIRD expects workshop hosts to collect evaluation forms, compile the data, and share the results as part of your Final Report, as well as with your planning committee. We will generate an online survey form that can be easily shared, filled out, submitted and calibrated via Survey Monkey (see the survey questions in Appendix B).

We suggest that you review them within two weeks of the workshop, while the experience is fresh in everyone’s mind. Within one month of the workshop, you should undertake a thorough analysis of the evaluation forms. This is done most effectively by assembling all the comments about each session, by session. In this way, the group’s overall evaluation of a particular component of the workshop can be quickly and easily determined. This analysis will be helpful to CIRD in planning for future workshops. A summary of all the evaluation forms should be sent to CIRD as part of the required Final Report. You will want to share this summary with CIRD and copies with the members of the Resource Team before our debrief call with you, as well.

3. Debrief with CIRD & Local Team

It’s important to hold a debriefing meeting with your planning committee and any key local decision-makers within two weeks of the workshop. This is an opportunity to share feedback from the evaluation forms, discuss what worked well or did not work well in the workshop itself as well as the planning process, and discuss your Final Report. This is also an important time to check in on post-workshop communications and tasks, review action steps, and make plans for follow-up. But don’t make these meetings all business; you’ve just held a wonderful workshop, so combine the debriefing with some celebration!

Three weeks after the conclusion of the final workshop CIRD staff also will have a debrief call with you to discuss your ideas for how the program can be changed or improved, obstacles and challenges you faced and how you overcame them, the most and least valuable aspects of the program. We can also help you think and talk through some next steps with your workshop and community. These calls will be most effective if you are able to summarize your committee’s thoughts and the input received on the evaluation forms, and have begun to develop a list of questions or challenges moving forward. The evaluations will be a useful tool to guide this discussion so they should be summarized in time for this debrief.

4. Reporting to CIRD

Within two months from the conclusion of your follow-up actions, you are responsible for submitting a Final Report to CIRD. To ensure we receive all necessary reporting materials, we request that you upload all items to an electronic form that we will provide to you in advance. In addition, this form contains various templates to guide the formatting of your materials, which we require you to use.

These elements are subject to change on the electronic form, but the following components are generally required and should give a sense for what goes into the preparation of the report—planning and execution, including each of the speakers and sessions, an accounting of all matching funds or donations, a list of all workshop participants (with addresses and email addresses), summary of evaluation forms, copies of key materials and outputs from the workshop, including photographs, scans or images of drawings of key flip charts, action plans, or any other key results. The most effective reports will be thoughtful analyses of
what worked and what didn’t, rather than just an accounting of the facts, and will include input and impressions from all members of your community. See a sample report here - https://drive.google.com/drive/u/1/folders/0B0PSNKSi284bNW41ekJCSWJzOUU

CIRD posts blogs to the rural-design.org website each month. You are encouraged to author a blog on your own about your town and your CIRD workshop. However, CIRD staff will work with you to write and post a blog to the CIRD website - http://www.rural-design.org/blog.

5. Local Communications & Follow-up

Post-workshop communications should be part of your larger communications plan, so ideally you will finish the workshop with a clear sense of what you will communicate, who will do it, how and when. If not, sit down and think through these steps as soon as possible to get some communications out within a week after your event. Either way, you may want to re-evaluate your communication channels, messages, and audiences based on what you learn or what happens at the workshop.

In the weeks after your workshop, you will want to consider the following types of communications:

- For workshop participants:
  - Thank you notes for participating
  - Workshop summaries, results and materials
  - Instructions and reminders for submission of evaluations
  - Reminders of any actions, commitments, or next steps coming out of the workshop
  - Opportunities to continue the conversation, get involved, or take ownership over certain actions and next steps
- For key stakeholders, decision-makers and supporters:
  - Thank yous for participating or supporting the workshop
  - Summary of results and next steps
  - Key needs and opportunities
- For the media:
  - Powerful stories or anecdotes from the workshop
  - Multimedia such as photos or videos
  - Results and next steps in the process, as well as a road map going forward
- For the general public:
  - Announcement of the workshop, as well as a reminder about the issue, context, and importance of addressing it
  - Links or ways to get more information
  - Opportunities to get involved going forward
  - Information about follow-up events

6. Taking Action

Most communities will leave their CIRD workshops with dozens (if not hundreds) of fantastic ideas and potential action items, ranging from specific design solutions to additional process steps. Your toughest job may be sorting through those steps, prioritizing, and figuring out which ones to tackle first. We suggest that you think about this challenge as you design the workshop, and plan your closing day’s activities to ensure that you leave with some sense of prioritization and clear next steps.

Regardless, planning for both short- and long-term action is one of the most important follow-up activities after the CIRD workshop. We recommend that you look for no more than 4 to 5 “lighter, quicker, cheaper” action steps to focus on following the workshop. Focus on easy actions that are achievable and can demonstrate some quick successes (such as planting petunias or writing a letter to the editor) and build further momentum and buy-in for ongoing actions. Then identify 3
or 4 longer term actions that address the highest priorities. When choosing long-term actions, focus on big ideas that will transform your community, even if it will take hard work and considerable time to accomplish.

Once you’ve identified your “starter” actions, report them back to workshop participants and the community, set clear deadlines, and get started. Don’t forget to record and track the full list of actions; it’s important to keep a complete list so you don’t lose sight of all the goals you worked hard to identify with your community! Keep in mind the results will also need to be included in your final report.
## Appendix R: CIRD Post-Workshop Report and Evaluation Checklist and Timeline

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible Party</th>
<th>Recommended Date Done by CIRD</th>
<th>Date Accomplished</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outline Final Report</td>
<td>Workshop Team and CIRD</td>
<td>1 month before the workshop</td>
<td></td>
</tr>
<tr>
<td>Draft post-workshop press release and send to CIRD</td>
<td>Workshop Team</td>
<td>1-2 days after workshop</td>
<td></td>
</tr>
<tr>
<td>Send press release</td>
<td>Workshop Team and CIRD</td>
<td>7-10 days after workshop</td>
<td></td>
</tr>
<tr>
<td>Thank you notes to all participants and the Resource Team</td>
<td>Workshop Team</td>
<td>within 10 days after the workshop</td>
<td></td>
</tr>
<tr>
<td>Hold local committee celebration and debrief, begin planning for next step follow-up activity</td>
<td>Workshop Team</td>
<td>2 weeks after workshop</td>
<td></td>
</tr>
<tr>
<td>Evaluation Forms Reviewed</td>
<td>Workshop Coordinator</td>
<td>2 weeks after the workshop</td>
<td></td>
</tr>
<tr>
<td>Join workshop debrief call with CIRD and report on status of follow-up activity plans</td>
<td>Workshop Coordinator &amp; Workshop Team</td>
<td>3-4 weeks after the workshop</td>
<td></td>
</tr>
<tr>
<td>Draft post-workshop blog post</td>
<td>Workshop Team/Communications Coordinator</td>
<td>1 month after the workshop</td>
<td></td>
</tr>
<tr>
<td>Invite participants and community to participate in follow-up activity and next steps</td>
<td>Workshop Team</td>
<td>1 month after workshop</td>
<td></td>
</tr>
<tr>
<td>Produce follow-up activity, implement, take action!</td>
<td>Workshop Team/Community</td>
<td>6 weeks - 2 months after workshop</td>
<td></td>
</tr>
<tr>
<td>Produce workshop final report</td>
<td>Workshop Coordinator</td>
<td>After follow-up program is completed and before December 1, 2018</td>
<td></td>
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<tr>
<td>Fundraise for Implementation</td>
<td>Workshop Team/Orton/CIRD</td>
<td>Ongoing</td>
<td></td>
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</tbody>
</table>
Appendix S: CIRD Workshop Participant Evaluation Sample

Participant Workshop Evaluation

Thank you for attending today’s workshop! We would appreciate your assessment of the program, content, and format of this CIRD workshop. This will help us understand what worked for you (and what didn’t), and will help us improve future CIRD workshops and activities.

1. How did you hear about this event? Please check all that apply:
   - Email
   - Newspaper
   - Letter of Invitation
   - Other

2. What did you hope to get out of this CIRD Workshop?

---------------------------------------------------------------------------------------------------------

Please rate how well the workshop achieved the following goals: Poor Fair Good Excellent

Comment

3. Educated people about local design issues

4. Provided tools, resources, and useful information

5. Helped the community develop prioritized ideas for action

Please rate the quality of the workshop for:

6. Interactive Sessions (Small Working Group Activities; Small Group Discussions, etc.)

7. Unstructured networking and socializing

8. Visual quality of the Speakers’ presentations

9. Speakers’ knowledge of their subject matter

10. Familiarity of the presenters and speakers with the design challenges facing the community

11. Relevance of the workshop topics to local design challenges

12. Usefulness of the tools and approaches presented

13. Refreshments and Facilities

14. Workshop organization

15. How would you rate your overall experience during this workshop? Please check one
   - Poor
   - Fair
   - Good
   - Excellent

16. With regard to the course design do you wish there was more, less or the same amount of:

   Presentations
   - More
   - Less
   - Same

   Questions & Answers
   - More
   - Less
   - Same

   Group Discussions
   - More
   - Less
   - Same
17. What was the most valuable part of the workshop for you? (please list one or two and note reasons):

18. What was the least valuable part? (please note reasons):

19. What were the most significant learning outcomes for you from today's workshop?

20. Are there any other topics or issues you wish had been addressed at this time?

21. Were there any topics or issues you wished were not part of the workshop?

22. Which of the following categories characterizes your role(s) in the community? Please check all that apply.

- Local government
- Business/Private sector
- Non-profit
- Service club or organization
- Resident
- Other: _______________________________

Please share any other feedback that you would like:
Appendix T: Form For Recording Cash And In-Kind Match

<table>
<thead>
<tr>
<th>Source</th>
<th>What is Donated</th>
<th>Cash Amount</th>
<th>In-Kind Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Time</td>
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<tr>
<td>Meeting Space</td>
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<td>Hotel Rooms</td>
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<tr>
<td>Food</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Speaker’s Fees</td>
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<td>Printing</td>
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<tr>
<td>Equipment/Supplies</td>
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<td>Transportation</td>
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<td>Other</td>
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</table>
Appendix U: Implementation Planning & Tracking

This tool from the Center for Innovation and Entrepreneurial Leadership can help with planning.

<table>
<thead>
<tr>
<th>REALITY CHECK</th>
<th>Answer</th>
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<tbody>
<tr>
<td><strong>Question(s)</strong></td>
<td><strong>Answer</strong></td>
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<tr>
<td>Purpose - what is the main goal of this action?</td>
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<td>Commitment - Can we get commitment and energy from the community to undertake this?</td>
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<td>Leadership - Who has the skills to lead (organization(s), individuals)? Who else do we need to involve to ensure success who isn’t in the room right now?</td>
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<tr>
<td>Time Frame - How long will it take to accomplish? Are there any political, economic or funding factors which might hurt/help the timing?</td>
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<tr>
<td>Finances/Resources - What, if any, financial resources do we need to tap into? Are there any organizations that can assist this action? Any other resources?</td>
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</tr>
<tr>
<td><strong>Your Recommendation (circle one):</strong></td>
<td><strong>Take Action!</strong></td>
</tr>
<tr>
<td><strong>Next Steps (e.g. Meeting date/time/location, Provisional Chair of Action Group):</strong></td>
<td></td>
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</table>
### Post Workshop Follow Up and Tasks

<table>
<thead>
<tr>
<th>Action or Strategy</th>
<th>Responsible Party</th>
<th>Resources Required</th>
<th>Timeline</th>
<th>Monitoring &amp; Benchmarks</th>
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