



M O O R E I A C O F A N O G O L T S M A N , I N C .

August 20, 2015

Ruben Lizardo
Director Local Government and Community Relations
Office of the Chancellor
University of California, Berkeley
2130 Center Street, Suite 200
Berkeley, CA 94720-4208

RE: ***Facilitation and Process Support Consultant Services***

Via email: Ruben Lizardo <rlizardo@berkeley.edu>

Dear Mr. Lizardo:

Thank you for the opportunity to submit a brief letter of interest to provide professional facilitation and process design support for the Richmond Community Working Group. Our diverse and experienced team of facilitators and process experts at MIG, Inc., would welcome the opportunity to assist the Working Group in coming to agreement on a set of recommendations regarding key aspects of UC Berkeley's new Global Campus to be located in Richmond Bay. It's an exciting project with great promise for the local community, the region, nation and world.

The educational, economic, physical, socio-cultural, operational and policy implications of this endeavor are many and inter-related. Successfully navigating through this complex, multi-faceted environment requires a process to effectively engage stakeholders to work collaboratively in charting a clear path forward, with benefits accruing to all. We understand you are deep into this engagement process and are now requesting consultant services to design, facilitate and document recommendations in preparation for presentation to UC Berkeley Chancellor Dirks in November.

MIG Qualifications

MIG, Inc. is a multidisciplinary firm that specializes in **community planning and design, strategic planning, organizational development, community engagement, group process facilitation, and graphic design**. Since the firm's founding in 1981, we have worked extensively with universities, non-profits, corporations and public agencies nationally and internationally to involve organizations and communities in planning for future change.

MIG is internationally recognized for our facilitation, collaboration and consensus-building expertise, developing and using **innovative techniques** to create an open atmosphere in which different viewpoints can be heard, acknowledged, addressed, and reconciled. We are particularly skilled at **multi-party planning and conflict resolution**, having assisted with many diverse stakeholder groups to develop joint goals, recommendations, action plans, communication protocols and resource sharing agreements. Due to our success in this area, we teach an annual course for the UCB College of Environmental Design, entitled: Citizen Involvement in the City Planning Process: Methods and Models for Inclusive Planning and Design. (In fact, MIG could potentially engage our students in the coming semester in supporting this project with research, analysis, intercept and social media outreach, documentation, etc.).

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The team we will draw upon for this assignment has **direct relevant experience designing and managing high-stakes, complex planning processes** with composed, representative community groups. In fact, we have worked with the University of California San Francisco for more than two decades, advising them in their interface with neighbors and other community members, and conducting several community-based planning efforts related to their Long Range Development Plan and the Mission Bay campus. We are currently working with University of California Davis, on their Long Range Development Plan Update, incorporating extensive and authentic community engagement into the planning. MIG has worked in Richmond, developing the Health and Wellness Element of the General Plan, and on several other projects allowing us direct interaction with all parts of the community. We are not simply facilitators, we are urban planners who understand the content of the sessions we lead.

The MIG Approach

Our facilitative approach, outlined below, focuses on fostering an environment of open dialogue and transparency, and building trust, capacity, ownership and momentum. We have found that building a human connection with participants, and building trust is critical to success. We have documented our approach to successful participatory process and meeting facilitation in our published and widely used book, *Meeting of the Minds*.

Process Design and Strategy - Holding an effective meeting requires careful planning for setting realistic meeting objectives, managing group dynamics, and ensuring good process and accurate documentation. Our facilitators will tailor the meeting agendas and approaches to address distinct needs, emerging issues and outcomes desired, working closely with a meeting planning team.

Facilitative Leadership – When we facilitate, MIG does not merely absorb information, but actively leads the discussion to keep it on track, gathering input from all participants equally, and ensuring a productive and effective meeting. We actively facilitate to achieve tangible results, while listening deeply and serving the group as a whole. We balance critical thinking and analytical tools with the human factors and team skills that ensure successful meetings.

Dynamic Group Performance - Gathering a diverse group of leaders in one room to find shared direction and focused action offers immense potential. In order to be successful, the dynamics between individuals and associated with the topic will be woven into the facilitation effort to ensure the experience of each person is leveraged as much as possible. We see two overarching objectives of all meetings: task accomplishment and socio-emotional cohesion. Without both achieved, a meeting will not be successful. We actively attend to both objectives.

Graphic Recording - MIG’s “facilitation graphics” combine leadership skills with graphic note-taking to help the group stay focused and engaged while moving forward — significantly reducing the problems common to groups that do not have facilitation with visual tools, such as dominance of personalities, “backtracking” and unresolved conflicts. Participant comments and questions are recorded in text and illustrations on large wall-sized paper (wallgraphics) that help to establish the group’s memory of both the flow and the content of discussions.

Engaging Diverse Stakeholders --- MIG provides a deep bench of trained and experienced facilitators who can effectively engage diverse stakeholders. We are fully comfortable and competent working within all cultures and communities, and tailor our methods, tone, language, behaviors, questions and communications to particular stakeholder preferences and styles. MIG understands the interconnectedness of language and culture, and how these elements influence the design of



stakeholder engagement activities. Our team brings a multi-dimensional awareness of cultural competency at an individual, organizational and systems level. We successfully engage ethnically and linguistically diverse stakeholders using a tailored approach that employs a broad range of proven facilitation techniques.

Consensus-Building -- Our carefully crafted methods to build consensus engage participants in a systematic process, with each step building toward the next until agreements are forged. We often establish a shared foundation of facts and a framework of consensus elements at a big picture scale prior to working through details where contention tends to reside. Our process creates an authentic ownership of outcomes among participants.

Process Documentation -- For a planning process to be successful and effective, a careful record must be kept of stakeholder concerns and issues. Documenting the planning process provides an ongoing record of participants' comments and concerns to convey findings to staff and decision-makers in a comprehensive, yet easy-to-read manner. Participants will have visible proof that their opinions were heard and considered. The summary documents will also be valuable in future efforts, providing a foundation for organizational cooperation and joint decision making on planning issues.

Building Capacity – MIG sees every project as a way to build client and community capacity. In team processes like these, it is easy to do this through role modeling, coaching and assessment of emerging leadership skills among team members.

Challenges and Opportunities

A process such as this that will influence the future in a profound way typically faces a complex set of challenges. The concomitant opportunities are tantalizing and create hope and expectations, inspire fear and skepticism, and overall, heighten the stakes and visibility of the planning process. Transparency in all aspects, taking time for all parties to be heard, and careful design and facilitation are *essential* components. Here are a few of the challenges and opportunities we anticipate related to the CWG process:

Opportunities

- ◆ Forging a strong and enduring partnership among the City, University, LBNL, industry partners, CBOs and the broader Richmond community to the mutual benefit of all.
- ◆ UCB demonstrating public service and commitment to ensuring a positive impact and multiple benefits to the Richmond area as a result of the new campus.
- ◆ Securing true champions of the project moving forward through design, construction and beyond.
- ◆ Acknowledging complicated racial history and dynamics in a way that is honest, direct, respectful and ultimately productive for the process.

Challenges

- ◆ Ensuring that the CWG is fully representative and inclusive of the many diverse cultures and interests in Richmond.
- ◆ Keeping the CWG engaged in productive and action-oriented work, rather than getting lost in small details or process discussions.
- ◆ Building additional trust and airing differing viewpoints within a limited timeframe.
- ◆ Exploring a range of potential approaches to the five key areas, and developing consensus recommendations within a limited timeframe.



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- ◆ Overcoming planning fatigue with fresh and varied process tools without compromising quality or continuity.
- ◆ Identifying creative solutions to long-standing problems such as how to build affordable housing and to ensure living wage jobs.

Process Enhancements

Based on our understanding of the process as conducted to date, MIG offers several potential process enhancements:

- ◆ Provide interim and detailed reporting of deliberations, in addition to summary level analysis.
- ◆ Maintain the integrity of the process by not allowing others outside to circumvent it or bypass these deliberations.
- ◆ Track comments in relation to if and how they influenced the emerging recommendations.
- ◆ Maintain momentum by keeping focus on the end result: agreement on a set of recommendations in the focus areas that will lead to the signing of legally binding agreements.
- ◆ Continue frank and regular communication amongst all parties.
- ◆ Allow for the complete and total objectivity of the facilitator to maximize trust building and transparency.

Key Personnel

MIG provides an experienced, objective consultant lead, Daniel Iacofano, with extensive knowledge in land use planning, education, strategic planning and implementation, and strategic communications. Daniel will be supported by a bilingual team of experienced facilitators and participatory planning experts.



Daniel Iacofano, PhD, FAICP, is a founding principal of MIG and CEO with over 30 years of experience in process design, public involvement, facilitation and consensus building for environmental and land use planning projects throughout the country. Dr. Iacofano has managed and participated in a wide range of planning studies, addressing issues related to land use, growth strategies, river and watershed management, flood control, habitat conservation and natural resource management. He is expert in managing multi-disciplinary projects, developing and implementing public and stakeholder outreach strategies and building consensus.

He has authored several publications, including *Public Involvement as an Organizational Development Process* (Garland Publishing, 1990) and *Meeting of the Minds* (MIG Communications, 2001), *The Inclusive City* (MIG Communications, 2007), as well as many articles on facilitation, organizational development, participatory planning and urban planning.

Dr. Iacofano has combined his strategic and organizational planning expertise with interactive facilitation techniques to assist countless agencies, communities, organizations and companies in working together to articulate goals, strategies and actions for the future. He has worked with clients all over the United States to develop over 50 strategic plans for higher education, transportation, land use, economic revitalization, corporate operations and agency organizational change. Dr. Iacofano has been a visiting lecturer at Stanford University, the University of California at Berkeley and the University of California at Davis, teaching courses in



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urban planning, urban and environmental conflict management, group process management and advanced communications.



Carolyn Verheyen is a firm Principal and MIG's Chief Operating Officer. She has worked at MIG for 26 years on complex organizational and community planning processes, with specialties in higher education, parks, recreation, community identity, social services, public health and transportation.

Ms. Verheyen has designed and managed large-scale, high-stakes stakeholder programs and strategic planning processes addressing a variety of social welfare issues, including child welfare reform plans, child development plans, public health alternatives, regional coordination plans, statewide system development plans and welfare-to-work transportation plans. Her facilitative leadership skills, content knowledge, action-research orientation and strategic thinking combine to provide clients with a steady guide and value-added service. She has designed and led consensus-building processes related to housing, economic development, land use, transportation, social services and education.



Joan Chaplick, AICP brings more than 25 years experience in the areas of facilitation, public engagement and outreach, planning, and collaborative land use planning skills to this project. Ms. Chaplick leads MIG public participation activities and has designed outreach strategies for projects throughout California for state, local and regional agencies. She is skilled at bringing best practices from her broad range of experience to each project.

Working extensively in multi-agency environments, Ms. Chaplick has assisted agencies with the establishment of stakeholder processes that have provided the productive feedback needed by the agency and technical teams to advance their project. She has facilitated and negotiated the resolution of land use conflicts, developed community visions that were used to inform transportation planning processes, resolved natural-resource-based conflicts between public and private landowners and improved planning processes so that projects were better positioned to receive grant funding.



Louis Hexter has been a MIG project manager of public involvement, community and organizational development and strategic planning projects for more than 20 years. Mr. Hexter has served as a meeting facilitator, graphic recorder and outreach coordinator for a variety of community participation activities and programs, working with a number of community-based and non-profit organizations in addition to public and private sector clients.

Mr. Hexter has conducted training in meeting facilitation, public outreach, graphic recording and management support systems for various public agencies and non-profit organizations. His projects have involved inter-agency collaboration, communications, public outreach, consensus building and strategic visioning. He has also designed and conducted strategic planning, team building, process management workshops and retreats for a wide range of clients at all levels from Board members to management executives to administrative staff.



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Jamillah Jordan is a planner, bilingual facilitator and project manager who specializes in public outreach and multi-method issue analysis for transportation, community health and education initiatives. Ms. Jordan combines subject-area and policy expertise with strategic planning and process skills to help clients identify and meet their goals.

Ms. Jordan works with a wide range of stakeholders as well as technical experts and focuses on effectively communicating information to the public in order to make projects meaningful and relevant and to gather constructive input. She advises clients on the most appropriate set of engagement tools to use to meet their unique needs and reach target audiences, drawing on both traditional and innovative techniques. She has developed and implemented public involvement plans and managed multi-lingual outreach processes.



Noé R. Noyola has over 10 years of experience as a project manager and facilitator. Mr. Noyola possesses a strong background in implementing community outreach initiatives. Throughout his career, he has specialized in urban planning, community development, affordable housing, policy analysis, community outreach, program evaluation, facilitation, plan preparation and Spanish language projects.

Mr. Noyola is a motivated and personable professional fluent in Spanish with a demonstrated record in planning and urban affairs. He has successfully completed project work with federal, state and local government agencies and non-profits.

A detailed budget can be provided after a final scope is determined.

We would be delighted to assist the Community Working Group, University and Richmond community in this important effort. If you have any questions about our services, please do not hesitate to call me or my colleague and fellow MIG Principal, Carolyn Verheyen at 510-845-7549.

Sincerely yours,

Daniel S. Iacofano, PhD, FAICP
Principal