

2003 ENVIRONMENTAL AND PUBLIC POLICY CONFERENCE

# Meeting Summary

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**Association for  
Conflict Resolution**

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Washington, DC 20036

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# Executive Summary

Over 110 participants attended the 2003 Environmental and Public Policy Conference creating excellent opportunities to discuss and deliberate organizational business. A summary of those reports follows.

**Diversity Dialogue.** A dialogue on diversity issues in our section and ACR was held on Friday morning. Approximately 35 participants attended. The tenor of the dialogue made it clear that we continue to have significant work to do on diversity issues in our work, our section, and our field. The facilitators annotated the lists of possible actions suggested by participants (page 4). One of the concrete recommendations was the development of a mentoring program, which was acted on at the strategic planning session and is described below. Other important recommendations can be found in the report.

**Advanced Practitioner Certification.** The Family section of ACR recently established an Advanced Practitioner status for their members. That effort precipitated an organization-wide workgroup to make recommendations to the ACR Board on how the advanced practitioner status should be addressed in other sections. The two EPP members of that workgroup, Bob Jones and Gail Bingham, joined incoming ACR President Rosemary Romero and ACR CEO David Hart for a discussion of this issue. A report on this discussion as well as results from a survey given during the session can be found on page 9. While nothing is finalized at this point, it is expected that a framework for Advanced Practitioner status will eventually be approved and that Sections, if interested, would work within the framework put forth to establish this new designation. There will be more discussion of this issue at the ACR conference.

## **Strategic Planning Session**

Participants spent the last half-day in a strategic planning session. Two workgroups were established and are described below. There were also several other discussions that did not lead to workgroups. A report on those discussions can be found on p. 19.

**Diversity Mentoring Program.** This new workgroup will work on an effort to create mentoring opportunities for aspiring practitioners of color in order to accelerate their personal growth and skill development. You can join this important workgroup by contacting the chair, Juliana Birkhoff ((202) 965-6390 or [jbirkhoff@igc.org](mailto:jbirkhoff@igc.org)).

**Nominations Committee.** Section Co-Chair Rosemary Romero asked for the creation of a Nominations Committee to work on Section leadership. This committee will report at ACR Conference in October. Members are Bob Jones, Kathryn McCarty, Martha Bean, Larry Williams, and Glenn Sigurdson. If you are interested in this Committee, please contact Bob Jones ((850) 644-6320 or [rmjones@mailier.fsu.edu](mailto:rmjones@mailier.fsu.edu)).

Expectations for future conferences can be found on page 23.

# Diversity Session: Suggestions For Future Actions

More than thirty-five participants at the recent ACR Environmental and Public Policy Section Meeting attended a Diversity session on April 25, 2003. The session had four objectives:

1. to acknowledge E/PP's past (what has worked well, and some of the reasons why our agenda is still unfinished;
2. to examine, personally, what contributions we make to the status quo;
3. to develop directions for future actions; and
4. to discuss how we -- individually and as a section -- can be accountable for these actions.

At different times within the session, participants focused on personal experiences with diversity, on section experiences, and on specific steps the section might take to promote diversity within the section and the field. Each of these formed a thread that continued throughout the discussion, and is reflected in the suggestions presented here.

The Diversity session was facilitated by John L. Johnson, Paddy Moore, and Greg Sobel. Mary Skelton Roberts and Rafael Montalvo presented a verbal report from the session to the conference plenary together with Paddy and Greg.

Session participants generated the suggestions for further action in this document at the end of the discussion. The suggestions are transcribed here essentially as there were recorded on easel-pads during the session. After the suggestions were grouped, notes were prepared jointly by the facilitation and reporting team after the session and are shown in a smaller font. Some of the notes provide additional detail that may not have been recorded on the easel-pad notes regarding a recommendation. Others describe points in the discussion that may help explain the meaning of a recommendation or why it was offered.

## **A. Guidance for Personal Actions**

1. Recognize that we live in a society where color matters.
2. Be more open to truly learning from each other's diversity. (Maybe more work in teams.)

3. Don't beat up on those people who are trying to do the work

Session participants acknowledged the hurt caused when a diversity initiative being developed was harshly criticized in an EPP meeting.

4. Communicate directly about problems before you speak to third parties. Practice what we preach professionally.

When an issue arises between EPP members we should generally aim to address the concerns directly and respectfully. We should also consider asking for mediative help from a mutually trusted colleague when we get stuck in a conflict with another member.

5. Be more welcoming and mindful about using jargon and insider shorthand.

New participants in our meetings acknowledged that they sometimes feel like outsiders. In the plenary sessions of this conference, the planners made special efforts to honor new participants, and the name exercise at lunch, and the evening la trenza river were particularly praised. Section leadership is planning to survey new participants to ask about their experience at the conference, and to use lessons to improve conferences in the future. Other ideas for welcoming new participants include: calling new participants after the conference, and offering a "buddy" pairing of newer with long-time members during our conferences.

One newer member said that in the annual ACR conference there were not enough "mentors" for the number of people who wanted to meet with experienced practitioners.

At the beginning of this diversity session, one of the facilitators asked people to identify themselves if English was not their first language. He invited those ESL participants to let us know if we need to explain or slow down the pace of discussion.

6. Be conscious and aware of our words, actions, and attitudes.

This suggestion urges us to be aware of the potential for hurting others or conveying messages of exclusion -- with words, actions or attitudes -- even when no hurt or exclusion is intended. Two anecdotes from past EPP section meetings made this possibility very clear. In one case, the only African-American woman attending was offended by the use of a phrase with pejorative racial connotations during a presentation, and the insensitive way other participants spoke with her about those connotations. In another section meeting, a participant suggested a future EPP conference be held in South Carolina and extolled the advantages of South Carolina as a conference location, in spite of an active boycott campaign about the state's use of a confederate war symbol.

Also related to this theme, two longtime EPP members have related how they have used an exercise on language awareness called "how to start a fire." In preparing for this year's session, one member of the facilitation team alerted the others that the term "flip chart" should not be used because "flip" is a derogatory term for Filipinos.

## **B. Recommendations for Section Process**

1. Take enough time to continue "sorting out" our diversity threads.
2. Forgive ourselves (for past unfinished business) - and gather how to move on as allies and colleagues.

As in our work as neutrals, recognize the different meanings of various kinds of "apologies." (Examples: "I am sorry that you feel hurt," "I am sorry that what I said hurt you," "I apologize; I now realize that what I said/did was insensitive...")

3. Be clear about our priorities, and what we can and cannot do in available time frames.

It is better to not adopt an initiative than to speak the words of commitment to a project and not follow-through.

4. Plan conference schedule several years in advance.

Many of our EPP mid-year meetings are put together under strong time pressure. Time pressure was one of the reasons the Joint Conference with the Center for ADR did not come together this year. This recommendation suggests that we begin planning our section meetings several years in advance. We could select the geographic area and perhaps the chairpersons two or three years out. Among other benefits, longer lead-time would allow more opportunity to collaborate with other organizations. Reducing the time pressure leaves more room to partner and work out logistical complications. It may also help us increase attendance.

5. Define and create better infrastructure in the E/PP section to facilitate taking effective actions.

EPP infrastructure was discussed in the Saturday plenary session. The section established a chairperson selection process, and other steps are being developed.

6. Reiterate commitment to diversity in our reading and speaking.
7. Take time to plan in non-crisis mode; be realistic *re* priorities.
8. Be more welcoming, and mindful of jargon and insider shorthand.

## **C. Recommendation to the Section for Action**

1. Develop and require **cultural competency criteria** for how we work. (Recommended for inclusion in the work of the Certification and Advanced Practitioner Task Forces.)

It could be a year-long section and/or ACR project to develop measures and identify means of gaining cultural competency, as a basis for requiring it for certification and advanced practitioner status. The concept is based on the belief that such a competency requirement acknowledges and respects the value to all parties embedded in different cultures.

2. Commit to and create a Joint Conference with the Center for Alternative Dispute Resolution.

A large percentage of CADR conference participants are people of color. Some are established ADR practitioners or professionals in related fields representing a broad range of subject matter and process expertise. Other participants are aspiring ADR practitioners. The original purpose in having a Joint Conference between CADR and the E/PP Section was to enable E/PP to learn from other perspectives on our work, to encourage other people to become colleagues in our work, and to expand and deepen the ways we work. Some EPP and other ACR members have extensive experience with the CADR conference, having led and also attended numerous sessions and workshops. EPP members Tom Fee, Bill Potapchuk, Mary Skelton Roberts, Frank Dukes, Paddy Moore, Tim Mealey, David Batson, Pat Tallarico, Daniel Bowling, Robert Fisher and Greg Sobel are presenting at CADR program this year.

Although not all perspectives and information about this year's effort to coordinate the EPP and CADR conferences were aired in the diversity session, the benefits of this event partnership are as compelling as ever. The recommendation is to pursue the Joint Conference for 2005 or 2006. In the meantime, there is an ACR-wide Committee that is developing protocols for ACR joint conferences in general.

3. Develop and launch a **Mentoring Structure** within E/PP to support people of color pursuing work in the field. This means a system to recruit mentors and mentees; match them up; provide a support structure for both groups during the mentoring time; use their experiences to assess what works and what could work better; and share what's most useful to other ACR sections, also learning from any of their mentoring efforts.

This section initiative can draw on the research and planning already conducted by RESOLVE. The recommendation envisions rich and practical learning experiences for mentors as well as mentees. Some matches may look more like partnering between two professionals with different backgrounds and expertise, while others may fit the more usual model of a student/mentee paired with an experienced practitioner/mentor.

The support provided the mentee should be specific to the individual's professional needs. For example, some may require relatively less "training" and more consultation/advice while conducting case work. The program should have quantitative goals for participation as well as qualitative measures of success – the most important of which would be jobs for mentees before or at least on completion of the mentoring.

The E/PP section established the mentoring program during the Saturday plenary, Juliana Birkhoff of RESOLVE volunteered to chair the effort and over a dozen

conference participants met to begin the committee's work. (See report on initial work of this group elsewhere in this document.)

4. Request that member organizations (such as Meridian, Concur, Resolve, CDR, CBI, etc.) contribute staff hours to work on diversity issues and mentoring, and reward those that do so. Acknowledge staff for this work as similar to billable projects.
5. Encourage **hiring** of people of color in all the organizations of our members. Ask section support for this, and encourage annual report-backs. Address the barrier that we are competing for good, qualified people.
6. Consider Joint Conferences with other ACR Sections (such as Justice, Community, Health, etc.) -- to give and to get value.
7. Consider dropping "Environment" from our E/PP name.
8. Discuss how we talk about our practice, our diversity of methodology, particularly in Public Policy issues and methods.

#### **D. Recommendations to ACR for Actions**

1. Organize a serious outreach effort to colleges and universities that have large populations of students of color-- at graduate AND undergraduate level -- to alert them to CR/ADR field. Be aware that there are career paths related to the environment and dispute resolution that are not directly mediation -- such as planning, urban studies, international development, etc.
2. Develop and require criteria for cultural competency in all ACR Certification and Advanced Practitioner standards, not just the E/PP section.
3. Consider providing funds to support increased participation by people of color in ACR and section meetings.

The chair of a past EPP section conference related that the high percentage of new attendees that year who are people of color was due, in large part, to ACR allowing registration fee waivers and providing funds to defray travel and accommodations expenses.

# Advanced Practitioner Status

## Discussion Summary

About 25 EPP practitioners participated in a concurrent session designed to bring them up to speed generally on the work of the ACR related to quality and qualifications. More specifically, the panel presented for discussion an overview of recommendations emerging from an ACR Work Group on Advanced Mediation Practitioner Membership that has been charged by the ACR Board to develop a general set of draft minimum criteria to guide ACR Sections interested in seeking approval for an Advanced Practitioner Membership category. The Work Group anticipates delivering a report with recommendations to the ACR Board in the Summer of 2003.

Rosemary Romero, co-chair of the Section and incoming President of ACR and David Hart briefed the participants on the various ACR activities underway in terms of a Certification Task Force, an update of the joint ABA/ACR/AAA statement of professional practice, work on an ethics committee and the efforts of the Advanced Practitioner Membership Work Group.

Bob Jones and Gail Bingham, members of the Section serving on the ACR Work Group presented an historical context of milestones for discussions on qualifications in the EPP Section including:

- 1<sup>st</sup> SPIDR Qualifications Commission Report (88):
- EPP Section Statement of Competencies based on '88 Report (92)
- 2<sup>nd</sup> SPIDR Qualifications Commission Report (95)
- 3<sup>rd</sup> SPIDR Qualifications Commission Report (00)
- SPIDR Senior Practitioner Work Group as part of 3<sup>rd</sup> Qualifications Commission (00)
- Merger of SPIDR, AFM, CREnet including Family Section Advanced Practitioner membership. (00)
- ACR Advanced Practitioner Task Force Report (01)
- ACR Advanced Mediation Practitioner Membership Work Group (02-03)

In participant introductions the following terms were used in response to the question why did you choose this session: "qualifications"; "membership" "practitioner" "profession," "quality," "advanced," "quality," "quality assurance," "certification," "competencies," "rosters," "license," "contracts" and the "field." Participants noted that this very array of words reflects the complexity of the topic, and agreed that there is a need in discussions of this topic to be as precise as possible, because some of these are used interchangeably when they may reflect very different concepts.

Gail and Bob noted that in the Work Group's draft:

- Sections have or will need to articulate a statement of competencies for practice in the areas the Section addresses as a condition for approving an advanced practitioner membership proposal.
- That some measure of experience, training, knowledge, and service to the field should serve as a proxy for demonstration of those competencies and should support the criteria for advanced practitioner status. Experience measures should include both some number of hours and cases, the latter as an indicator about diversity of experience and sufficient satisfaction to be selected again.

The review and discussion of the Work Group's draft focused on the thinking about "how" best to implement an advanced mediation practitioner membership proposal via ACR sections as well as "whether" and "why" questions for the Section to consider:

- What resources will be available for Sections to implement this membership?
- What impacts will advanced mediation practitioner membership have on the Section's efforts in encouraging greater diversity in the EPP practice and in dealing with barriers to entry to practice?
- Why not consider a generic across-the-board vs. a section based advanced mediation practitioner membership?
- Does this address the processes needed for providing continuous improvement of quality services? What should the role of observation or journals be in the membership requirements?
- Does the focus on mediation make sense for the EPP section, or can/should we expand it to include facilitation and other consensus-building processes?
- It is it worth the volunteer time and energy of the Section members? Should we be focused as Glenn Sigurdson suggested in his paper on refining the competencies and addressing ethical dilemmas instead?

Participants discussed the requirements and point system approach developed for the USIECR roster, and wondered whether the EPP section could build on it in some way if the section decided to establish an "advanced mediation practitioner" membership option. At the conclusion of the session the participants were asked to complete a survey the results of which follow.

## EPP Section Survey Summary on Advanced Practitioner

### (13 Responses)

The ACR Advanced Practitioner Work Group was charged by the ACR Board to develop a general set of draft minimum criteria to guide ACR Sections interested in seeking approval for an Advanced Practitioner Membership category. We anticipate delivering a report with recommendations to the ACR Board in the Summer of 2003.

We have assumed in our work that Sections have or will articulate a statement of competencies for practice in the areas the Section addresses. We are also assuming that some measure of experience, training and service to the field should serve as a proxy for demonstration of those competencies and should support the criteria for advanced practitioner status.

We are seeking your input for consideration in refining these criteria. We are also seeking your input to make sure the criteria make sense and are capable of practical implementation from section to section.

**Experience.** ACR should represent a significant, but achievable accomplishment that is clearly distinguished from the requirements for “practitioner” membership (3 years experience). Among other requirements they should have significant practitioner experience (at least 3 additional years at least one-half time practice in EPP with a minimum of 80 hours acting as sole or lead and completing 20 different cases as solo or lead).?

#### 1. When you think of someone you consider an “advanced practitioner”, what are the attributes that are most relevant to you?

- Experienced with the essential work: consensus building and the pieces of assessment, evaluation, etc, with people who are dealing with env. And pp issues.
- Ethical, understand where problems are/ could be, conduct selves professionals and are exemplars to others.
- Reputation and proven (in a market sense) capability to provide high quality service.
- Experience, openness; clarity of thinking and speaking; assessment capability; ability to manage group dynamics; forward looking analysis of what’s happening; what’s missing; listening.
- Experience; adaptability; imagination; understanding of the conflict resolution process; understanding of conflict; acceptance of conflict and knowledge of strategies;
- Experience; quality of, quantity of and diversity of...
- Experience which is measured by: 1 number of cases; client recommendations.
- Experience and willingness to “keep fresh” by continuing professional education

- Experience; quality of service and communication skills
  - Experience and customer satisfaction.
2. **What would constitute a reasonable measure of time that it might take an EPP practitioner to have made a distinguishable step beyond basic practitioner status?**
- 4 :            3 years/ 1/2 time practice acting as a sole or lead mediator
- 4 :            3years/ full time practice acting as a sole or lead mediator

Other?

- 10 years vs. 3 years. 3 years sounds too close to “regular” practitioner; 10 years but not necessarily full time.
- 5 years
- 5 years 1/2 time; 4 years full time.
- No year basis but # hours beyond basic practitioner?

Comments/questions/concerns

- Full time equivalent
- 1/2 time needs to be quantified.
- Time should be in relation to # and types of cases
- How is 1/2 time defined? 20 hours /week? That of a reasonable salary?? 20 weeks a year?

3. **Do you think 20 cases as solo or lead within 3 years is a reasonable experience measure for EPP advanced practitioner status?**

Yes: 1            No: 9            Don't Know: 1

Comments/questions/concerns

- Yes if take into account size of cases. If very big cases, 20 is really too many--# of hours might
- No- Need a way to substitute cases for hours and vice versa. But hard to measure what is a “case”
- No- A certain # of cases within a 10 year period. A person who has done 20 cases in 6 years might be just as advanced
- No- depends on what a “case” is. This assumes all cases are equal in terms of time and experience.
- No- need cases and hours. Some of us have lengthy cases, but the # is few as a result.
- No- some cases require so much time that a practitioner may do less cases.

- No- some cases are large- better to us hours not cases. Maybe ECR 200 hours?
- No- seems like too many because cases are usually large.
- No- way out of proportion- may focus on hours like USEICR and not cases.
- No- some/many “cases” projects last 3 years plus.
- No- these cases often last a long time.
- Don’t know- depends on whether large long term cases have sub-cases within the larger case.

**4. What areas of knowledge do you think are relevant for an advanced EPP practitioner?**

- Not just mediation/conflict resolution theory and practice, but knowledge of the public policy formation process
- Convening; variety of processes and process design (not all 1 hammer); facilitation skills (procedural, behavioral, problem solving); agreement writing and meeting summary skills; understanding of how to do homework on substantive issues; prior knowledge should not necessarily be important as long as you know that substantive understanding is vital on the fundamentals and that you must have time to do this or not take the case on...i.e. be aware and evaluate your own competency to take case on.
- Process experience as a neutral in EPP cases
- Process; environmental
- Knowledge of typical environmental practices; knowledge of laws and regulations on environmental or public policy topic of practice; knowledge of best practices in the field; demonstrate knowledge of a wide array of ADR tools and convening processes.
- Content knowledge in the types of cases practiced.
- Cultural competency; management of scientific, planning and other expertise; government statutes, regulations, etc. at relevant level and issues.
- Relevant legislation; process design/flexibility

**5. Would you be supportive of reference to membership on the USIECR roster as evidence of experience that could support application for an EPP Advanced Practitioner status?**

Yes: 10      No: 1      Don't Know: 2

Comments/questions/concerns

- Yes- but modified to increase hours.
- Very well thought out but creates barriers to entry.
- Yes- with some way to allow for PP practitioners (not environmental cases) to also use the roster entry criteria to get advanced membership

- Yes- but not exclusively
- Yes, but should be “partial evidence”

**Training and Knowledge.** The Work Group has proposed the following: The AP applicant must have completed a minimum of 24 hours training and/or education during the 3 years prior to application not to include training/education counted towards achievement of “practitioner” status. Training and/or education may include:

- Courses or programs which have been approved for continuing education credit by professional ADR organizations
- ADR courses or programs offered for academic credit by accredited colleges and universities
- ADR courses or programs offered by trainers and training organizations who have been approved by mediation or other ADR organizations, associations or jurisdictions; and
- Serving as a trainer or instructor for any of the courses and programs referenced above

**6. Given the above, do you think the EPP Section should require for advanced practitioner (check one)**

2 24 hours of training

6 40 hours of training

**Other:**

- Continuing CLE/CME every XX many years
- More hours and fewer cases
- Graduate degree in conflict resolution or related field?
- 24 or 40 hours including X hours in cultural competencies.
- Consider continuing education, but not just for credit.
- Why not include any course completed during the past 10 years?
- Uncertain
- Don’t know the answer here
- Don’t limit this to “ADR” training- there are many different types of training that should be permitted, e.g. language training, cultural competency etc.

**References.** The Work Group has proposed the following: The applicant must provide 2 letters of reference from colleagues familiar with the applicant’s practice and 2 letters of reference from those who have used the applicant’s mediation services.

**7. Given the above, do you think the EPP Section should require for advanced practitioner (check one)**

4 2 letters of reference each from colleagues and users

5 3 letters of reference each from colleagues and users

1 4 letters of reference each from colleagues and users

*Other*

- 4 letters from all users and all must be from different process or combine of up to 2 from co-facilitator and 2 different users.
- Minimum 2 letters from users plus 1 letter from colleague.
- Letters from colleagues could be difficult for solo practitioners. This would require co-facilitation? Dump this- or it is a feel good reference from a friend?\
- I have concerns about the letter of references because I have found that federal agencies, most of my clients cannot provide such letters with OGC approval.

Comments/questions/concerns

- Can't anyone find friends who will write a letter?
- Not clear whether you are only talking about users or users and colleagues.

**Service to the Field.** As an ongoing requirement to maintain membership, AP members must complete 24 hours of voluntary service in any combination of the following:

- Minimum of 8 hours service to the profession including service on ACR programs, committees and other leadership positions.
- Minimum of 8 hours service to the community including activities where the member uses mediation or conflict knowledge experience or expertise to educate or assist any community of the member's choosing.

8. **Given the above, do you think the EPP Section should require for advanced practitioner (check one)**

5 16 hours of service to profession and 8 hours to the community

5 8 hours of service to profession and 16 hours to the community

*Other:*

- 24 hours total with at least 8 in each.
- 8 + 8 total is adequate.
- Either/or 0 hours to profession should be required; if someone wants it all to be community, that should suffice.

Comments/questions/concerns

- Needs to be more defined, could include pro bono work also.
- Clarify if this is per year?
- Is this an annual requirement?
- Clarify how long before EPP advanced practitioner membership is up for renewal

- Would roster managers then be a different kinds/level of practitioner? I guess they would be a member of the section and not an advanced practitioner.
- Service to the community should be a higher priority than service to the field.
- Service to the profession should include mentoring junior staff.
- Not sure since so much volunteer work may be required to get the experience.

## **WHAT DO YOU THINK THE EPP SECTION SHOULD DO?**

- 9. Would the fact that Advanced Mediator Practitioner members would have the opportunity to be placed on an ACR web-based referral list be an important reason for EPP to develop an advanced mediator practitioner status?**

Yes: 5      No: 3      Don't Know: 4

Comments/questions/concerns

- I'm wondering what effect it will have on the regional aspect of the USEICR roster which is more than a list on the web.

- 10. Based on what you know of the draft criteria, do you believe the EPP Section should apply for an Advanced Practitioner membership?**

Yes: 11      No: 1      Don't Know: 1

Comments/questions/concerns

- No. Let USIECR serve for those who want to market selves and put our energy into ethics and competencies. If at all, do it when we've first done these other things.

- 11. If you think the EPP Section should apply for the AP membership, would you be willing to assist the section through volunteer efforts?**

Yes: 3      No: 3      Don't Know: 8

Comments/questions/concerns

- Good work- you're doing the Lord's work!

# Diversity Mentoring Program

The group set itself three questions to address in its 30 minute breakout session.

1. What would a successful diversity mentoring program look like? What would be the outcome measures? What would the timeline for success be?
2. What steps do we need to take to operationalize a diversity mentoring program? What are the next three months of steps?
3. Who do we need to reach out to operationalize the diversity mentoring program?

Group members clarified that the diversity mentoring program was focused on bringing people from ethnic and racial groups that are currently unrepresented into the section. The long term goal was jobs, but we are imagining this as a door opening committee.

Juliana asked the group to imagine that we were reporting back to the sector in two years. What would we see different in the room as the diversity mentoring program was reporting out? What would the diversity mentoring program be reporting on that had happened in the last two years?

Group members generating a list of things we would see:

- We see at least 5 new people at the section meetings that are in diversity mentoring partnerships.
- We see wide ownership and knowledge of the program among section members.
- We see more people of color in section meeting and in the field.

Group members said the report to the section members would be reporting:

- We would be reporting on what we have learned about what works and what could be work better.
- We would have a clear definition of partnerships-including how they are mutual and how formal they are.
- We would report on how the program could be financially sustained by organizations; what help would there be for individual mentors and mentees?
- We would have examined/developed strategies for different business models and we would have examined different models for different kinds of jobs, not just to become a practitioner.
- We would report on the training program for mentors and mentees and how that training was working.

- Over time we would develop a sustainable method to support the mentoring program, for example a fee surcharge on members, fund raising from organizations, or fundraising from foundations.
- We would have figured out a way to connect the program with the USIECR roster.

Over the next 3 months:

- Ask ACR for support.
- Ask for direct contributions from members
- Ask ACR/EPP section leadership for permission to assess ourselves to support this program
- Establish a committee of do-ers and maybe an advisory committee
- We would research who else is doing what to mentor now and how to build on those programs.

Juliana Birkhoff has agreed to chair this effort. Other participants include: Rafael A. Montalvo, Jeff Blair, Larry Williams, Joan Calcagno, Jan Marie Fritz, Laura Kaplan, Monique Pierel, Paddy Moore, Mary Skelton Roberts, Gregory Sobel, Xantha Brusio, and Kathleen Conway.

# Strategic Planning Session

## Discussions

### Outreach Workgroup Notes

#### **Needs:**

1. More cooperation, less fighting
2. To increase use of ADR
3. Understand and educate our users, supporters and critics
4. To increase awareness of what we do
5. To be relevant and relate what we do to planners and others
6. To be more a part of environment and other communities
7. Reach the next generation of practitioners through university students, etc.
8. Reach out to agencies, NGOs, corporations, etc.
9. Need linkages to ACR, sections, other audiences; address duplication of efforts
10. To increase EPP membership
11. To increase resources, funding
12. To survive

#### **Actions:**

1. Brand EPP (ACR) and Public Policy Consensus Bldg. Have a market analysis by a professional ( a program at Yale may help)
2. Form clear distinct principles and values
3. Work with community mediation programs; it will help achieve diversity
4. Hold joint conference with CADR and learn from each other. Have joint leadership meetings with CADR and others
5. Convene meeting with other ACR sections on specific issues (it will help avoid duplication)
6. Set up university chapters, esp. at diverse universities
7. Get "best practices" out and use PCI training materials. Have material available online
8. Share knowledge of resources
9. Document and keep linked to work by other organizations. Be a model of internal organization. Improve web-sites
10. Write articles for other's journals and attend their conferences

11. Engage users, critics, and supporters in problem solving on how to expand the use of consensus building
12. Have speaker bureaus
13. Let folks know what is being done
14. Link consensus building as a means of shaping solutions for specific issues
15. Link to (case?) forms-marketing

## Needed Tools and Resources Workgroup

The following notes are an overview of the break-out discussion on **Tools and Resources**. Those participating in this discussion included Richard Alper, Martha Bean, Xantha Bruso, Jeff Citrin, Ann Gosline, Scott McCreary, and Ed Moreno. These notes were prepared by Martha Bean.

Our discussion focused on the following general topics, posed as questions answered in the course of the conversation:

- What tools do we need?
- What tools do we have?
- How can tools and resources be disseminated so that we can all become more facile with them?
- What specific ideas do we have for moving forward with some of these ideas, and who can do this?

### **Tools we need:**

- Information on past cases: successes, processes and procedures used, outcomes
- Tools for modern realities of environmental and public policy collaboration. Ideas included tools that would help us in the following situations:
  - You are working with people who have the nomenclature of and rhetoric about collaboration, and may even have the basic capacity for and understanding of collaboration. But they are not truly committed to it, either because of what it implies philosophically or because it can be resource intensive. Or because they are not as good at it as they think they are.
  - Your clients / stakeholder groups / parties are 'process weary'
  - You can't have a meeting for any variety of reasons: travel is expensive, parties have travel restrictions, scheduling is impossible, etc.
  - You have people interested in using on-line tools
  - You have some people who want to (or are willing to) use a particular communication technology, and others who are not willing or able; both groups need to be included the collaboration
  - You do not have the ultimate decision makers 'at the table' – because it is not possible with the plethora of other collaborative processes, etc.

- You are working in a team of facilitators / mediators, some of whom you did not choose (e.g., if you have a large multi-party collaboration, and some of the participating organizations / caucuses have an internal mediator working with their group).
- Targeted, practical research

### **Tools we have:**

- The on-going case data base project (Birkhoff)
  - There was some discussion in the small group about trying to make sure that methods / procedures / process are coded for each case
  - There was also discussion about defining 'success' for this data base project
- The on-going on-line collaboration study (McCreary, Raab and Eng)
- The Critical Issues Papers' written for the EPP section in 2002:
  - Quality and Implementation of Agreements (Fleischer and Pettigrew)
  - Reflections and Suggestions on Practice and Quality (Sigurdson)
  - Hammers in Search of Nails: Responding to Critics (Golten, Smith and Woodrow)
  - Evaluation and Research (Birkhoff)
  - Democracy and Civic Engagement (Bourne)
  - Governance and Institutionalization (Carlson and Stephens)
  - Beyond Environment (Ozawa)
- Options to learn from other sections / professions / disciplines about how they accomplish various tasks and overcome challenges similar to our own. For instance:
  - People involved in the environmental justice community might have a lot to teach us about cultural competency, and increasing the diversity in our ranks.
  - Professionals involved in organizational development (including the OD section of ACR) might have a lot to teach us, including how to do 'appreciative inquiry' to identify successes.
  - People who are discovering collaborative processes for the first time, and using these in innovative ways
    - E.g., the 'Community Conferencing' presentation at the 2003 EPP/ACR conference

### **Disseminating tools**

- More learning / training tracks at EPP and other ACR conferences
- Tie into EPP newsletter / list serve
- More critical issues papers

## **Ideas for implementation (with assignments / volunteers where these were made)**

- Organize learning events (perhaps at conferences) that tap into other professions / sections and their innovative work with new collaborative tools
- Continue to use conferences as the locus for disseminating the results of emerging research.
- Proactively identify research needs and priorities for the section; offer these to Hewlett and other funders; disseminate to researchers; tie into the new Research Section of ACR which also has, as a task, to identify research priorities
- Workshop style session at next EPP / ACR conference (or entire track) on alternatives to meetings (“What do you do when you can’t have a meeting?” or “New tools for a new era.”)
  - Martha Bean was interested in working on this

# Expectations for the Conference

As a part of the strategic planning session, participants were asked to identify their expectations for EPP conferences. This is a compilation and categorization of the “sticky” notes.

## **Overall Expectations**

- Career development for new people, how to identify opportunities, consulting practice
- Better opportunities to get to know people outside of informal conversation (in the actual planning session)
- A place to build relationships
- Strengthen relationships among practitioners (eg. race/area of practice) and research
- A place to have difficult but important conversation
- Opportunities to meet and talk informally
- Keep cost low
- Think about hotels far in advance to allow for roommate finding
- Energy enthusiasm recommitment to field
- Emphasize state of the art practice
- Diversity as heart of ACR
- Networking with other practitioners

## **Skill Development**

- Advanced training/workshops
- Add-in training opportunities on specific substantive areas (eg ESA issues)
- Trainings on the latest technological developments in remote learning (eg web based conference, electronic voting systems)
- Continue to serve as a forum for exchanging ideas and experiences

## **Audience/Participants**

- Youth involvement outreach to local CR youth for demonstration of advanced skills, contributions on youth community issues

## **Topics/Content**

- Have a focus topic like Anacostia
- Have at least one period for open space
- Continue to explore and report on critical issues in field

- Help us/give opportunities to integrate different threads of practice address difference in values/theory base and ways to complement overlap
- Role of consumers in marketing
- Get feedback from consumers
- Promote interactions between practitioners and clients
- Field trips with local involvement
- Continue with field trip or similar activity (ie real world issue)
- Live case examples
- Include private corporations who are parties in issues
- At least 1 plenary on big picture issues (eg how's what we do relate to participatory democracy?)
- Mini session for airing/discussion with specific ideas
- Hear about projects/new stuff
- More work on "local" capacity building issues
- More topics reaching out to other fields
- For the section: collaboration in the age of pre-emptive intervention
- Take advantage of opportunity to report out/take stock of ongoing research initiatives involving our members
- Present case studies on diverse issues to highlight accomplishments, lessons learned
- More small group dialogues in sessions
- Provide opportunities for learning about cutting edge, techniques processes, issues