



January 21, 2020

Nathan Poore, Town Manager
Town of Falmouth
271 Falmouth Rd
Falmouth, ME 04105

Dear Mr. Poore:

The Consensus Building Institute (CBI) is pleased to present this proposal to the Town of Falmouth to design and facilitate a robust public engagement process to develop a Town Vision and Values statement.

For more than 25 years, CBI has improved the way that leaders collaborate to make organizational decisions, achieve agreements, and manage multi-party conflicts and planning efforts. A nationally and internationally recognized not-for-profit organization, CBI provides high-skilled facilitation for state and federal agencies, non-profits, and international development agencies around the world. Conveners and stakeholders consistently report that CBI's facilitators are distinctive in their ability to integrate substance and skill, design customized processes, act impartially, and build trust.

CBI has a unique skillset to offer the Town on this endeavor: a blend of highly skilled facilitation and stakeholder engagement expertise, municipal visioning experience, and local Maine understanding. This proposal highlights a few of our initiatives that we think are most relevant.

Our team to support the Town will include me and my colleague Carri Hulet, who will serve as an advisor to the process. I am a CBI senior mediator, based in Portland, with fifteen years of facilitation and mediation experience and a focus on designing and facilitating dispute resolution and stakeholder engagement strategies around complex public policy issues. Carri holds a Master's in City Planning from MIT and has nearly twenty years of facilitation experience and expertise on municipal planning efforts. She is based in Cambridge, MA.

As you consider CBI's proposal, we invite you to contact us to further explore the opportunities and potential benefits of CBI's involvement.

Thank you for considering our interest and proposal to help Falmouth plan for its future.

Sincerely,

David Plumb
CBI Senior Mediator

Consultant Services to Conduct a Public Process to Develop a Town Vision and Values Statement Town of Falmouth, Maine

Proposer: Consensus Building Institute, Inc.

Local Maine Address: 82 Pine St., Portland, ME 04102

Tel: Direct 207.536.0378 | Main 617.492.1414

Contact: David Plumb, CBI Senior Mediator

Contact email: dplumb@cbi.org

Date Submitted: 21 January 2020

Table of Contents

OVERVIEW, EXPERIENCE & QUALIFICATIONS	1
Organizational Qualifications.....	1
Team Overview	1
Staff Bios	1
METHODOLOGY & APPROACH	3
Statement of Project Understanding	3
Proposed Approach	3
Selected Projects and Client List.....	4
AVAILABILITY FOR INTERVIEW	6
APPENDIX A: TEAM MEMBERS' CVS	7
David Plumb	7
Carri Hulet	14

Overview, Experience & Qualifications

The Consensus Building Institute (CBI) is pleased to submit this proposal to the Town of Falmouth to conduct a public process to develop a Town Vision and Values statement.

ORGANIZATIONAL QUALIFICATIONS

CBI, founded in 1993, improves the way that leaders collaborate to make organizational decisions, achieve agreements, and manage multi-party conflicts and planning efforts. A nationally and internationally recognized not-for-profit organization, CBI provides strategic planning, organizational development, and highly-skilled facilitation for state and federal agencies, non-profits, and international development agencies around the world. CBI senior staff are affiliated with the MIT-Harvard Public Disputes Program and the MIT Department of Urban Studies and Planning.

CBI APPROACH

Visionary
Managing Complexity
Grounded in Reality
Outcome Focused

CBI's areas of expertise include:

- Facilitation and Mediation
- Citizen Engagement
- Building Collaboration Capacity
- Organizational Strategy & Development

CBI has extensive experience helping leaders design, manage, and build strategic focus for complex visioning and strategic planning. The CBI team has the expertise to assess the history, issues, and stakeholder dynamics, and then design, organize, and implement a comprehensive approach, all with an eye toward achieving the stated outcomes. More information about CBI can be found at www.cbi.org. The website includes general descriptions of services, detailed staff CVs and bios, case studies and related documents, and a knowledge center with various articles, blogs, tools, and exercises.

TEAM OVERVIEW

CBI Senior Mediator David Plumb will lead the facilitation of the Committee, including process design, meeting facilitation, public/stakeholder engagement, and all other aspects of the process. CBI Senior Mediator Carri Hulet will serve as an advisor to the process, providing consultation on process design and strategic advice at key process junctures, drawing on her knowledge working with many communities on visioning and planning.

STAFF BIOS

David Plumb, *CBI Senior Mediator*

David Plumb is a mediator, facilitator, trainer, and researcher with more than 15 years of experience managing complex development and public policy issues in a variety of environments, including Nigeria's Niger Delta, northern Chile, and urban United States. Based in Portland, Maine, David co-leads the organization's Corporate Community Engagement practice. Prior to CBI, he directed the Sustainable Business Practice at Search for Common

Ground. He also spent eight years working as a financial journalist and correspondent, mostly for Bloomberg News.

A primary focus of David's work is assisting communities, companies, and authorities to interact more constructively and engage in productive dialogue. He designs and facilitates multi-stakeholder processes that can provide a credible space for addressing historical grievances and mistrust, as well as exploring creative solutions for the future. David also designs and implements participatory processes that give citizens and key stakeholders an active voice in making smarter policy decisions, assisting governments to develop new public policies with wider public support. He is currently providing facilitation support to the Maine Climate Council. In Chile, he led the facilitation team of the Energy 2050 project, which mobilized public, private and civil society actors around ambitious sustainability goals, leading to dramatic changes and landing Chile on the front page of the Washington Post as the "Solar Saudi Arabia."

In addition, David has assisted NGOs and industry groups to negotiate environmental and social standards for key commodities such as farmed fish, facilitating steering committees and large-scale public meetings around controversial issues. As a trainer, David has worked with community-based organizations to strengthen their capacity to engage in dialogue, with government regulators who need assistance in managing complex public participation processes, and with multinational corporations that need to improve globally their social and environmental performance.

Carri Hulet, *CBI Senior Mediator*

Carri Hulet is a Senior Mediator at CBI where she helps diverse groups working on public issues including climate change, land use, energy, and transportation. Carri, who holds a Master's in City Planning from MIT, is a skilled process designer and project manager. She strives to build strong relationships with the clients and parties with whom she works and to help them stay focused on the people and places their decisions will affect. Much of Carri's work focuses on the impact of a changing climate on local communities and regions. She has helped towns, cities, and regional collaborations develop plans and policies to address climate impacts and reduce their greenhouse gas emissions, and she helped create the Climigration Network. Carri is also affiliated faculty with the Program on Negotiation at Harvard Law School where she teaches a semester-length course each fall, and she provides customized trainings for companies, nonprofit organizations, and government entities.

Carri is based in Cambridge, MA and holds an M.C.P. from the Massachusetts Institute of Technology and a B.A. in Political Science from Tufts University. She is fluent in Spanish. Carri's recent publications include:

- [*Climigration and the Private Sector*](#). Co-authored with A.R. Siders. Community Development Innovation Review. October 2019.
- [*Managing Climate Risks in Coastal Communities: Strategies for Engagement, Readiness, and Adaptation*](#). Co-authored with Lawrence Susskind, Danya Rumore, and Patrick Field. Anthem Press, 2015.

Methodology & Approach

STATEMENT OF PROJECT UNDERSTANDING

CBI certifies that all details outlined in the Request for Qualifications have been read and understood.

PROPOSED APPROACH

The Town of Falmouth has experience drafting a vision statement, as well as experience trying to take action that is aligned with that vision. The events described in the “Background” section of this RFQ point to a frustration that is not unique to Falmouth – vision statements don’t always achieve their purpose of helping to guide and orient future actions.

In CBI’s view, community visions are most effective when the process for developing them is an opportunity to wrestle with conflicting values around development and progress. Constructing a shared vision as a town requires forcing the hard questions, surfacing tensions, and exploring why people hold these different views. The process is one step removed from any particular development initiative, yet the conversations help community members play with trade-offs, explore implications, learn together, and work creatively together. A good visioning process will lean in to views that appear conflicting, seeking to pull those differences to the surface and engage, rather than avoid them.

The RFQ cites a definition of a community vision that says it should “not represent one individual’s or just one group’s point of view. It must represent the consensus of a group of people...” Achieving this community-wide consensus is a challenge, yet it infuses the vision statement with strength and legitimacy.

CBI would work with Falmouth to develop the details of a strategy for achieving broad-based buy-in around a new vision statement for Falmouth. Given what CBI knows today about the situation, we would suggest the following sequence of activities.

- 1) **Confirmation of approach:** CBI understands that the Town Council is convening this process and would be CBI’s key counterpart. The town manager and relevant staff are also important counterparts. As a first step, CBI would conduct a set of interviews with the town manager, relevant staff, and a handful of council members to refine our approach for this process and also to hone the questions we will use in a town survey (see next step). This step will culminate with a review by the full council of our approach.
- 2) **Town-wide online survey:** CBI has experience with large online surveys, using tools such as SurveyMonkey, in communities. We would work with the town to find the best distribution mechanism and list of residents. The survey would focus on values underlying people’s view of the preferred future of the town, providing some data and also offering opportunities for a broad range of people to offer ideas. CBI would summarize the results to feed them into subsequent steps.
- 3) **Focus groups:** CBI would pull together smaller groups of people to take a deeper dive into the trade-offs and priorities at play. These groups could be set up as mixed or singular, i.e. specific stakeholder groups, such as housing advocates, open space

advocates, etc., or an intentionally diverse set of views. These conversations would produce more data and would also help to compare priorities among different people, exploring the reasons why people hold different perspectives.

- 4) **Drafting committee:** With data and ideas in hand, CBI would work with the council to pull together a drafting committee to help shape the words of the vision statement. The drafting committee may be a sub-set of the council itself, or perhaps an existing committee or sub-committee that would be appropriate for the task.
- 5) **Public meeting and outreach:** Once there is a draft statement of vision and values, along with a clear description of all the input received and how it was incorporated into the vision, CBI would facilitate a large, interactive public meeting to test and refine the vision. Online channels for feedback can also be used, perhaps with the same mechanisms/lists used in the initial survey.
- 6) **Finalization:** Using the reactions from the public meeting and online feedback, the drafting committee will create a final version of the vision and values statement, together with a clear narrative of the process and the ideas that led to this output.

Regarding Phase 2 of this initiative, CBI would be happy to partner with a planning firm to assist Falmouth in updating its Comprehensive Plan. CBI would provide facilitation and process support, while the planning firm would provide the technical and substantive capacity to undertake the required steps.

SELECTED PROJECTS AND CLIENT LIST

CBI has facilitated visioning and strategic planning with numerous municipalities, states, organizations, and multi-organizational networks, helping leaders establish effective strategies, policies, and partnerships that advance their mission. In most cases, these strategic planning efforts include external stakeholders, such as key partners, communities, elected leaders, and funders.

Below is a list of CBI projects that are relevant to the proposed work with the town of Falmouth. Client contact details are available upon request.

Maine Climate Council, 2020. Starting in January 2020, CBI will be providing facilitation support to the Maine Climate Council, an initiative convened by Governor Janet Mills to develop concrete recommendations to help the state meet its goals around carbon emissions reductions and resiliency in the face of climate change. CBI will assist the Council and its six thematic Working Groups to build consensus recommendations, as well as advise the state on the overall process and facilitate public meetings.

Town of Scituate: Community-led Coastal Vision, Scituate, MA, ongoing. With the Town of the Scituate, through funding from a Coastal Resilience Grant, CBI is facilitating a project to advance the town's previous coastal resilience efforts by addressing coastal vulnerabilities identified in a 2016 vulnerability study as well as honoring community input from a 2018 Coastal Community Assessment. The project aims to create a 50-year, community-led vision for the Town. Community engagement efforts include facilitated neighborhood gatherings, town-wide workshops, and a highly-interactive, custom-designed website for project participation (www.scituate2070vision.org).

Town of Scituate Coastal Community Assessment, Scituate, MA, 2018. At the request of the Town of Scituate and EPA Region 1, CBI conducted an extensive assessment with coastal

residents, business owners and managers, and town officials and emergency preparedness officers to understand how the community views their risks and opportunities as a coastal community with a history of repeat storm damage in the era of climate change. Three of the four recommendations CBI made in the report are currently being pursued by the Town.

Bay Area Regional Collaborative, California, 2014-present. CBI conducted an organizational assessment for the Bay Area Regional Collaborative, which involved an assessment and facilitating the joint board and executive directors of the Association of Bay Area Governments, Bay Area Air Quality Management District, Bay Conservation and Development Commission (BCDC), and Metropolitan Transportation Commission. The result was renaming the collaborative, developing an organizational structure, which involved changing the board composition, and creating an organizational work plan on climate with associated funding and resources over three years. CBI has continued to consult with the executive leadership team on implementation over the last four years.

Salton Sea Management Plan (CA), ongoing. CBI works with the State of California to facilitate its Salton Sea stakeholder advisory committees, as part of the implementation of the State's 10-Year Management Plan and long-term planning goals to protect the Salton Sea. The process involves a complex set of legal and regulatory challenges and crisis-level air quality and habitat issues. CBI conducted a stakeholder assessment to clarify, align and coordinate the work of the stakeholder committees and is helping the State implement its collaborative planning efforts amidst mounting urgency at both the local and state level.

Chesapeake Bay Regional Collaboratives, Maryland, 2016-2019. CBI led three separate regional networks of organizations through a strategic planning process to find ways to collaborate on achieving shared goals for environmental and economic improvements within their jurisdiction. The East Baltimore Collaborative chose to focus on green infrastructure projects and workforce development. The Eastern Shore Collaborative chose to focus on large-scale agricultural pollution in the region. The third collaborative in South Mountain, Pennsylvania, developed a work plan to advance sustainable, low-impact economic development.

Lower Mystic Regional Working Group (LMRWG), Boston, MA 2016-2018. Due to increasing congestion and development in the Lower Mystic River region of Massachusetts, the Massachusetts Department of Transportation, and the Metropolitan Area Planning Council, along with the Cities of Boston, Cambridge, and Somerville, conducted a joint study of options to improve transportation through various land use and traffic demand management strategies. CBI facilitated the working group, which included executive-level decisionmakers from the cities and agencies, as well as large local businesses and interest groups. CBI also conducted several large public meetings and multiple sector-specific and neighborhood-specific stakeholder meetings to inform the development of the study.

MassMoves – Sustainable Mobility for the 21st Century Commonwealth, 2016-2017. CBI managed the public engagement effort to build a vision for sustainable mobility across Massachusetts. The effort utilized an advisory group of mobility leaders, nine public workshops as part of the Massachusetts Senate's Commonwealth Conversations, a dedicated, interactive website, professional public surveying in partnership with Mass, Inc., and other tools to help build a statewide vision to inform policymaking. The process included extensive coordination with state senators, metropolitan planning entities, regional transportation authorities, and members of the public.

Strategic Planning for the Massachusetts Division of Ecological Restoration, Boston, 2016-2017. Worked with a state division to develop a 3-5-year plan, including reviewing mission statement, key principles, and major activities. Conducted a staff assessment, a survey of external partners, and facilitated several day-long staff meetings in order to develop the final plan.

Envision Cambridge, Cambridge, MA, 2016. Team member among CBI and Utile, a planning and design firm, facilitating a community-engagement process around the creation of an innovative master plan for the City of Cambridge, Massachusetts.

Cambridge Compact for a Sustainable Future, Cambridge, MA, 2015-2016. Worked with a coalition of 20 institutions and businesses including the City of Cambridge, Harvard University, MIT and major other companies that control major commercial spaces in Cambridge to help them develop a three-year workplan. They identified projects that allow them to leverage their shared expertise and advance key sustainability goals while working and learning together.

Saw Kill Watershed Community, 2015-2016, Saw Kill Watershed, NY. Assisted in the formation of the Saw Kill Watershed Community, a group of community members and researchers from Bard College and state agencies who want to work jointly to care for the water quality of the Saw Kill Watershed. This includes facilitating several full-group community meetings and supporting the leadership team as they work to formalize a body that is largely community-driven, with support from agency funding and Bard and other technical support.

Smith Island, MD, Visioning Plan and Implementation Strategy, Maryland, 2014-2015. CBI was project manager and lead facilitator of this community-driven visioning process. CBI was contracted to help this last inhabited island in the Chesapeake Bay respond to pressing problems. CBI conducted interviews with residents, state and county officials, and non-governmental organizations to advise on the Strategic Plan and Work Plan. Through public meetings, expert forums, and task force meetings, CBI drafted a plan that reflected the Islanders' vision for addressing a declining and aging population, erosion of marshlands and coastlines, declining fisheries, and barriers to a robust tourist economy. The Plan has been instrumental in leveraging funding for infrastructure projects, transportation planning, and residential façade improvements.

West Davis Corridor Environmental Impact Statement, 2009 – 2011. Designed and implemented all public engagement efforts on a \$6M NEPA study along the sensitive shoreline of the Great Salt Lake. Facilitated 15 ongoing stakeholder working groups with representatives from government, industry, and the public. Managed over a dozen large-scale public meetings (150 – 300 participants) and the intake and responses to all public comments, including thousands of emails and phone calls and dozens of meetings with individuals or small groups.

Rhode Island and Connecticut Borderlands Project, Killingly, CT and Exeter, RI, 2008. Conducted an assessment and created a podcast of stakeholders from across the two towns regarding planning, development and growth culminating in two town-wide visioning processes.

Availability for Interview

David and Carri are both available from 9am – 2:30pm on Tuesday Feb. 4.

Appendix A: Team Members' CVs

DAVID PLUMB

Senior Mediator
Director, Latin America
Consensus Building Institute
Tel. +1 207 536 0378 | E-mail dplumb@cbi.org

PROFESSIONAL SUMMARY

Mediator, facilitator, trainer, and researcher, with global experience managing complex development and public policy issues in the US, Latin America, Africa and Europe.

KEY ACCOMPLISHMENTS

- Designs and facilitates dispute resolution and stakeholder engagement strategies around complex development and public policy issues, including environmental and natural resource disputes in the US, Latin America and Nigeria's Niger Delta and Angola.
- Designs and facilitates multi-stakeholder initiatives, difficult conversations, and strategic planning.
- Co-leads CBI's Corporate Stakeholder Engagement Practice, working with a range of clients and partners including the International Finance Corp., the World Wildlife Fund, Chile's Ministry of Environment, and the Corporate Social Responsibility Initiative at Harvard Kennedy School and Shell.
- Designs and delivers trainings in consensus building, negotiation and conflict resolution for clients including the United Nations and multinational corporations.
- Advises multilateral banks and organizations, including the Inter-American Development Bank, the World Bank's Compliance Advisor Ombudsman and the United Nations Development Programme, on accountability mechanisms and stakeholder interaction.
- Works in a wide range of environments in the US, Latin America, Africa and Europe.

EXPERIENCE

2008-Present **Consensus Building Institute** Portland, ME; Cambridge, MA; Santiago, Chile
Senior Mediator
Director, Latin America Program;
Co-Lead, Corporate Community Engagement Practice

Develop and manage programs in the US, Latin America and in CBI's Corporate Community Engagement Practice, with a focus on international development, community engagement and the negotiation of credible industry standards. Design and facilitate stakeholder engagement strategies in complex public

policy and natural resource disputes. Facilitate difficult conversations and meetings for a variety of organizations, working in a wide range of environments globally where community, government and corporate interests have collided, including Nigeria's Niger Delta, Angola, Chile, Mexico, Guatemala, Argentina the US. Design and deliver trainings in consensus building, negotiation and conflict resolution.

2013-2014 **Harvard Kennedy School of Government** Cambridge, MA
Research Fellow, Corporate Social Responsibility Initiative

2007-2008 **Search for Common Ground** Washington, DC
Director, Sustainable Business Practice

Developed and led a new consulting practice that assisted corporations and their stakeholders, including local communities and advocacy groups, to find common ground and build partnerships. Designed interventions for energy companies and their stakeholders in Nigeria's Niger Delta and Angola. Led and co-led assessment missions in northern Angola and the Niger Delta.

2005-2007 **Consensus Building Institute** New York, NY
Independent Consultant

Provided expertise in mediation, facilitation, conflict assessment and training in these areas. Assisted clients including the World Bank's International Finance Corp., and a Roundtable in Guatemala working to overcome conflict between a world-class Maya archeological site, loggers, communities, environmentalists and the government.

2000-2005 **Bloomberg News** Buenos Aires & New York
Journalist, Correspondent

Reported and wrote articles published by Bloomberg's news service and hundreds of newspapers worldwide such as the New York Times, Philadelphia Inquirer and Chicago Tribune. Developed expertise in banking, investment, finance, capital markets, emerging markets. New York-based from 2003 to 2005, covering billionaire investor Warren Buffett, finance, insurance companies and fraud. Buenos Aires-based from 2000 through 2002, chronicling Argentina's political, economic, financial and social crisis. Spoke comfortably during frequent appearances on Bloomberg TV and Bloomberg Radio.

1998-2000 **Bridge News** Santiago, Chile
Correspondent

Santiago, Chile-based correspondent covering the economy, politics, business and other news.

EDUCATION

2012-2013 **Harvard University, Kennedy School of Government** Cambridge, MA
Master in Public Administration (MPA)

Area of focus: Corporate Social Responsibility, Business and Society Interactions

1991-1995 **Princeton University** Princeton, NJ

B.A. in Political Science & Latin American Studies

Graduated Magna Cum Laude. Best senior thesis prize in Department of Politics and Program in Latin American Studies.

1996-1997 **Fulbright Scholar** Santiago, Chile
Affiliated with the Catholic University of Chile. Area of Research was local government and citizen participation in Chilean cities.

PROFESSIONAL AFFILIATIONS

Association for Conflict Resolution: Chair, International Section, 2009-2010
Corporate Community Dialogue Facilitators Forum, Harvard Kennedy School of Government, Corporate Social Responsibility Initiative: Founding member

LANGUAGES

Fluent in English and Spanish. Basic Portuguese.

SELECTED PROJECTS

Climate, Energy & the Environment

Maine Climate Council, 2020. Starting in January 2020, CBI will be providing facilitation support to the Maine Climate Council, an initiative convened by Governor Janet Mills to develop concrete recommendations to help the state meet its goals around carbon emissions reductions and resiliency in the face of climate change. CBI will assist the Council and its six thematic Working Groups to build consensus recommendations, as well as advise the state on the overall process and facilitate public meetings.

Energía2050 – Building consensus around a new energy policy, 2013-2015. CBI facilitated an ambitious initiative by Chile's Energy Ministry to develop a new long-term energy policy through a participatory process. Among other responsibilities, CBI guided the work of the Energia 2050 Steering Committee, a multi-stakeholder group of 28 people charged with developing a vision and roadmap to 2050 for the energy sector. A key area of analysis was the relationship between energy projects and communities. The group reached agreement and Presidente Michelle Bachelet announced the new policy in December 2015.

Community mediation regarding industrial pollution in southern Chile, 2019. CBI designed and led a roundtable process with community leaders, environmental activists and a salmon farming company that was discharging waste into a local river. CBI helped the parties to work constructively on the core issue of stopping the pollution, assisting them to reach an agreement with specific commitments around water quality, participatory monitoring, ongoing studies around the health of the river, and management changes inside the company needed to ensure it could make good on its new commitments. In the words of one of the environmental activists, the dialogue experience marked a "new stage of relations between the actors in the community, with trust building, healing of old histories, dreaming and building together, and learning to live with our differences."

New Bedford Toxic Clean-up Facilitation, 2010-2012. On behalf of MassDEP and the City of New Bedford, facilitated public meetings of concerned neighbors and local and state officials,

and provided advice in improved public participation in the clean-up of a site, which today includes two schools and public housing. Separately, provided community engagement advice to the Environmental Protection Agency around their Superfund clean-up initiative in New Bedford Harbor, as well as facilitating public meetings around the harbor clean-up.

Roundtable on Energy and Communities, 2014. CBI designed and facilitated a national conversation in Chile on ideas and concerns around company-community interactions related to energy projects and territorial planning for energy development. The 14 workshops generated discussion between diverse actors and informed the Energy Ministry as it considered new norms and policies on these issues.

Ensuring Rights-compatible Dialogue Between an Indigenous Community and an Energy Project, 2016. CBI assisted an indigenous community in southern Chile to engage in a constructive, rights-compatible dialogue with a hydroelectric project.

Chile Renewable Energy Project – Community Engagement Advisor, 2013-2016. Senior advisor on community engagement to a start-up company seeking to build a large, innovative pumped-storage energy project near a fishing community in northern Chile. Advised the company on how to establish and maintain a credible, transparent and participatory interaction with the community and other stakeholders. CBI also documented the experience in a short documentary that tells the story from the community's and company's perspective.

Chile Hydro Project Community Perceptions Assessment (Alto Maipo), 2013. Led an assessment team that developed a public report of community perceptions around a planned \$1.8 billion hydro project in central Chile. The purpose of the report was to create a transparent base for a more meaningful interaction between the company and a wide range of stakeholders. The report included the range of views and concerns, ideas from community members about how to improve interaction with the company, and CBI's recommendations around establishing credible dialogue to address priority issues.

Chevron Nigeria Participatory Stakeholder Evaluation, 2008. Co-led and facilitated a participatory stakeholder evaluation of Chevron's community engagement mechanisms in the Niger Delta, involving Chevron, oil-impacted communities, civil society and government representatives.

Mexico Wind Industry Community Engagement, 2010-2012. On behalf of the International Finance Corp., facilitated a series of strategic conversations inside the Mexican wind industry about improving the sector's social performance and engagement with community stakeholders.

Chevron, Richmond, Oct 2008-Jan 2009; 2011. Led an assessment of community stakeholders affected by Chevron's refinery operations in Richmond, CA. Provided coaching and advice to Chevron's community engagement staff on effective strategies for re-building the relationship between Chevron and community stakeholders. Co-led re-assessment in 2011.

Peru Documentary on Tintaya Dialogue Roundtable, 2010-2011. Co-led a video documentary, in partnership with the Corporate Social Responsibility Initiative at Harvard's Kennedy School of Government, of the Tintaya Dialogue Roundtable in Peru. The roundtable has for the past 10 years assisted communities and a copper mine to resolve disputes and promote sustainable development. Conducted all interviews for the project.

WWF Climate & Forest - REDD+, 2009. Co-facilitated a process to help WWF build internal agreement inside its climate change and forestry teams around incorporating deforestation

into international climate negotiations. Assisted WWF to draft a policy position, allowing the organization to strengthen its voice in the global negotiation.

IFC Uruguay Pulp Mills Stakeholder Assessment, 2005-2006. Member of a team assessing stakeholder concerns around two paper pulp mills planned for the border of Uruguay and Argentina. Led drafting of the assessment report that directly affected decision-making on social and environmental impact assessment and mitigation.

Coasts & Oceans

New England Marine Fisheries Council, 2019. CBI assisted the New England Marine Fisheries Council to develop recommendations for a participatory process to involve stakeholders in the potential shift to ecosystem-based management of fisheries on the Georges Bank.

Aquaculture Stewardship Council (ASC) Feed Standards, 2017-present. Facilitating the development of common standards for aquaculture feed globally, with a particular emphasis on sustainability of fisheries that supply marine ingredients such as fish meal and fish oil. Guiding a multi-stakeholder, consensus-building process between environmental groups, aquaculture producers and researchers.

WWF Aquaculture Standards, 2009-2012. Facilitated the development of credible environmental and social standards for aquaculture worldwide, with a focus on farmed salmon and trout. Guided a multi-stakeholder, consensus-building process between environmental groups, aquaculture producers and researchers. Facilitated multi-stakeholder steering committees and large public meetings.

Improving Social Sustainability of Salmon Farming in Chile, 2017. Facilitating an innovative group of 11 leading salmon companies in Chile that seek to improve their socio-environmental performance, based on a guide and toolkit developed by CBI, together with WWF and Dutch lender Rabobank. The companies are changing the way they interact with local fishermen and other stakeholders, committing to more participatory approaches for managing impacts and investing in the region.

Maryland Coast-Smart Climate Adaptation Initiative, 2008-2009. Co-led an initiative with the State of Maryland that brought diverse stakeholders together around the need to prepare coastal communities for new risks stemming from climate change such as sea-level rise and storm surge. Co-designed a high-level, interactive coastal summit attended by nearly 200 mayors, county commissions, state lawmakers, environmentalists, developers and a wide range of coastal leaders. Assisted the development of an innovative simulation of the real-life discussions around climate change adaptation in coastal communities.

Economic & Social Policy

Study: “National and International Experience in Mediating Socio-Environmental Conflicts,” 2015. CBI conducted a study for Espacio Público, an independent Chilean think-tank that looked at ways in which state institutions have incorporated mediation and dialogue facilitation to help manage conflicts around development projects. The report made specific recommendations and was used by Espacio Publico as part of public policy proposal. The study is available here:

[http://www.espaciopublico.cl/publicaciones/categoria.tpl?categoria=Documentos%20de%20Referencia.](http://www.espaciopublico.cl/publicaciones/categoria.tpl?categoria=Documentos%20de%20Referencia)

Chile Guide to Prevention, Management of Development Conflicts, 2012-2013. Working with Chile's government agency that approves Environmental Impact Assessments (Servicio de Evaluación Ambiental), co-developed a guide for conflict prevention and mitigation around development projects in Chile. In partnership with a local NGO, Casa de la Paz, also provided advice to the government agency about how to enhance its own role in preventing and managing conflict related to development projects. The guide is available here: http://www.sea.gob.cl/sites/default/files/migration_files/guias/Guia_buenas_practicas_relaciones_actores_seia.pdf.

Global Development & Peacebuilding

Assessment of Honduras Forest Sector Grievance/Dispute Resolution Mechanisms. On behalf of the United Nations Development Programme, led an assessment mission in Honduras to analyze the current sources of conflict in the forestry sector, potential new conflicts that may arise related to REDD+ (Reducing Emissions from Deforestation and Forest Degradation), and the mechanisms that exist to address conflicts. The report also provided recommendations for the development and strengthening of mechanisms for conflict resolution, and steps to support prevention around disputes related to REDD+ in the country.

Honduras Development Partnerships, 2010. Provided independent advice and guidance to a mining company in central Honduras on building multi-stakeholder partnerships for sustainable development in the mine's area of influence.

CAO Review of IFC Performance Standards on Social and Environmental Sustainability, 2009-2010. Co-led a stakeholder engagement and assessment process as part of a global review of the Performance Standards for Social and Environmental Sustainability of the International Finance Corporation (IFC), on behalf of the Compliance Advisor and Ombudsman Office (CAO), an independent oversight body of the World Bank. Co-designed assessment approach and methodology and managed an assessment team in India.

Organizational Training & Capacity Building

Chile Public Participation and Indigenous Consultation, 2016. Co-led a training for 25 professionals from public participation unit in Chile's Environmental Review Agency on approaches to conflict prevention and management during the Indigenous Consultation process and during other public participation processes.

Shell Community Liaison Officers Global Training, 2011-present. Co-developed a training course for Shell's community-facing staff globally that provides a mutual gains framework for delivering social performance at the community level, including grievance handling. Delivered the course, as a lead or co-facilitator, in Nigeria, Europe, North America and South America.

OECD National Contact Points Mediation Training, 2012-present. Assisted, in a variety of ways, the National Contact Points (NCPs) responsible for managing complaints brought in relation to the OECD Guidelines for Multinational Enterprises, a set of environmental, social and human rights good practice standards. In April 2014, co-led a 2.5 day mediation training for Nordic and northern European NCPs, and has co-led similar trainings Santiago, Chile for Latin American NCPs (November 2014) and in Vienna, Austria for NCPs from around the world. Also has co-led a "horizontal peer review" session on assessment practices by NCPs. In addition, revised, based on stakeholder feedback, an NCP Mediation Manual prepared by CBI to assist NCPs in their problem-solving role.

United Nations Development Operations Coordination Office and United Nations System Staff College, Strategy, Negotiation and Political Acumen Skills Training, 2009-present. Co-development of training materials and co-delivery of training programs for heads of UN development agencies. Training integrates strategic priority setting, negotiation and consensus building in politically significant contexts.

Inter-American Development Bank, Independent Consultation and Investigation Mechanism. Assisted the IDB to design and respond to stakeholder input on a new grievance mechanism, the Independent Consultation and Investigation Mechanism (MICI). Led training with the new MICI leadership in dispute resolution and implementation of the mechanism.

United Nations Development Program (UNDP) Negotiations Capacity-Building, 2006-2008. Deliver customized training for UNDP senior staff worldwide, though on-line course with live instructor feedback.

Negotiation Skills for Pharmaceutical Reimbursement, 2011-2013. In partnership with pharmaceutical industry pricing analytics partner PriceSpective, delivered advanced negotiation trainings to Bristol-Myers Squibb, AstraZeneca, and Merck to assist in pricing and market access of a new and existing products. Also co-developed and delivered negotiation training to Pfizer senior executives in Argentina and South American countries. Trainings focused on skills for joint gains in negotiations with national payers, covering pricing, patient access, risk sharing, stakeholder engagement and other issues.

United Nations Development Operations Coordination Office, Crisis and Post Conflict Cluster, Skill-building Workshop for CPC Strategic Planners, 2009. Member of facilitation team for June 2009 workshop focused on the Integrated Mission Planning Process (IMPP) for DPKO, DPA, DOCO, and humanitarian agencies. Co-developed course material and wrote case scenarios.

US Army Facilitative Leadership Training, 2009. Co-designed and delivered training in facilitative leadership, negotiation and engagement with civilian leaders to US army officers deploying to Afghanistan.

Strategic Planning

United Nations Country Team (UNCT) Strategic Planning (UNDAFs), 2009. Member of facilitation team managing the strategic planning process (UNDAF) for the UN Country Team in Tajikistan.

CARRI HULET

Senior Mediator
Consensus Building Institute
Cell 857.998.7913; direct 617.844.1114; chulet@cbi.org

PROFESSIONAL SUMMARY

Mediator, facilitator, and trainer with nearly 20 years of professional experience. Facilitates planning and conflict resolution processes with multiple stakeholders on a diverse set of issues including climate change, community planning, transportation, water and wastewater, energy policy and infrastructure, smart growth, and gender dynamics.

KEY ACCOMPLISHMENTS

- Lead the Climigration Network with a team of CBI staff, volunteer experts, and climate adaptation practitioners. Developed the Network from concept.
- Co-designer and lead facilitator of the Resilient Mystic Collaborative, a 19-municipality, watershed-wide effort to develop, fund, and execute projects that increase resilience at a regional scale.
- Negotiation instructor for the Program on Negotiation at Harvard Law School's foundational course in dispute resolution and negotiation.
- Co-led an internal effort to increase CBI's understanding of gender dynamics in negotiation and collaborative processes, including designing and delivering new trainings and naming strategies for reducing the impacts of bias and stereotype threat in the processes we lead.
- Led the team that designed and executed a conference-scale event on food, water, and energy to commemorate CBI's 20-year anniversary.

EXPERIENCE

2011-present **Consensus Building Institute**

Cambridge, MA

Senior Associate

Develop and facilitate programs and decisionmaking processes with diverse stakeholders on a wide range of topics affecting the public good. Key area of expertise in climate adaptation and climate retreat, in particular. As a project manager, leads other staff and external partners, and mentors junior practitioners. Active in thought leadership (writing, presenting) and trains/teaches on a regular basis.

2007-2011 **The Langdon Group**

Salt Lake City, UT

Project Manager

Led collaborative efforts between federal, state, and local agencies; private industry; and local stakeholders on participatory public projects. Managed the public engagement efforts on over a dozen roadway and trail construction, reconstruction, or environmental impact projects, from highways to major

arterials to multi-use trails. Awarded Consultant of the Year by the Utah Department of Transportation, 2008

2006-2007 **MA Office of Public Collaboration** Boston, MA
Network Manager for Public Policy Programs

Designed and facilitated public forums engaging local residents in deliberative dialogue around contentious public issues such as immigration and race relations.

2001-2006 **The Steppingstone Foundation** Boston, MA
Alumni Director

Created and ran programs for alumni/ae of an educational non-profit focused on supporting high-achieving students from low-income, racially segregated, and/or immigrant communities.

EDUCATION

2013 **Massachusetts Institute of Technology** Cambridge, MA
Master in City Planning

2004 **Tufts University** Medford, MA
Bachelor of Arts, Political Science

ADDITIONAL TRAINING

Corporation for Positive Change, Appreciative Inquiry Training, 2010

Straus Institute for Dispute Resolution, Pepperdine University School of Law, Facilitating Dynamic Groups, 2009

International Association for Public Participation (IAP2), Public Participation Certificate, 2008

*Center for Civic Life, Facilitating Deliberative Dialogue, 2006
Mediation Works, INC., Mediation Certificate, 2004*

The Institute for International Mediation and Conflict Resolution, Nicosia, Cyprus, 2004

LANGUAGES

Fluent in English and competent in Spanish

PUBLICATIONS AND REPORTS

Climigration and the Private Sector (co-author) Community Development Innovation Review, Federal Reserve Bank of San Francisco, October 17, 2019 <https://www.frbsf.org/community-development/publications/community-development-investment-review/2019/october/climigration-and-the-private-sector/>

To Stay or Go? New Insights on Managed Retreat CBI blog post, August 2019 <https://www.cbi.org/article/new-insights-managed-retreat/>

Serious Gaming in South Carolina CBI blog post, September 2018
<https://www.cbi.org/article/serious-gaming-south-carolina/>

Building Equity into Climigration CBI blog post, August 2017
<http://www.climigration.org/blog/2017/8/11/lessons-from-just-transition-and-anti-gentrification>

Managing Climate Risks in Coastal Communities: Strategies for Engagement, Readiness, and Adaptation (co-author) Anthem Press 2015

Getting Past Politics on Climate Change EDRBlog post, Oct 2014
<http://law.utah.edu/getting-past-politics-on-climate-change/>

Devising a Better Way Forward CBI blog post, March 2013
<https://www.cbi.org/article/2013/devising-better-way-forward/>

The Practice of Public Dispute Resolution, Measuring the Dollar Value of the Field with Lawrence Susskind. Negotiation Journal Volume 23, Issue 3, pages 355-364, July 2007

A Glossary of Deliberative Terms Dispute Resolution Magazine, Volume 12, No. 2, p. 27, 2006

Deliberative Democracy Meets Dispute Resolution, Reflections and Insights (teaching video), PON Clearinghouse, Cambridge, MA 2006

CURRENT RELEVANT PROJECTS

Scituate 2070 Coastal Vision, 2019-present. Scituate is a small town on the coast of Massachusetts that endures as a thriving community, in spite of its vulnerability to coastal storms, particularly Nor'easters. Scituate is host to the highest number of repetitive claims to the national flood insurance program in the state of Massachusetts. Over time, the community knows their vulnerability will only increase if they do not plan well for the future. CBI has designed and is currently facilitating a community-led visioning effort to articulate 50-year aspirations, in terms of community values, goals, legacy-building, and land use patterns, so other planning and design efforts have a target to aim toward.

Resilient Mystic Collaborative, 2018-present. In partnership with the Mystic River Watershed Association, CBI has designed and is currently facilitating a watershed-wide effort among 19 municipalities to work with their neighbors on projects of regional significance to decrease collective risk of harm from flooding, drought, extreme temperatures, storms, sea level rise and other climate-intensified risks.

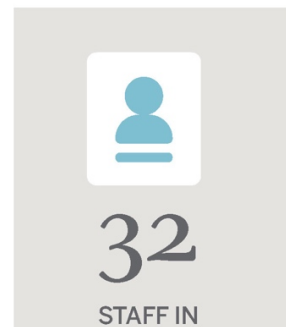
Climigration Network, 2016-present. In 2015 CBI convened a small group of people to talk about an issue that, at the time, was almost never discussed in public: climate-induced migration. In the intervening years, scholars, governments, businesses, and many communities have begun to focus directly on the challenges related to relocation in the face of climate change. CBI has been building a network of practitioners and people with lived experience to share knowledge and experiences, promote innovative approaches, and help build a field around climigration.

Municipal Resilience Barriers and Opportunities, 2019-present. At the request of the Barr Foundation, CBI designed and is facilitating a process to uncover the common barriers municipalities in Massachusetts are facing as they seek to become more resilient to climate change. CBI interviewed dozens of stakeholders, wrote an assessment, and is convening a

diverse group of municipal representatives and activists to vet the list of barriers and name high-priority opportunities to overcome those barriers.

The Nature Conservancy New York Climate Adaptation Team Strategic Planning, 2018-present. In 2017 The Nature Conservancy in New York State restructured, creating a new team dedicated wholly to climate resilience. CBI has been helping the new team determine where to focus their considerable heft as fundraisers, scientists, and policy influencers.

2019 Engagement Highlights



For more than 20 years, CBI has worked at the forefront of collaboration and conflict resolution, helping leaders generate breakthrough results on tough social, environmental, and economic issues.

www.cbi.org

