
Town of Falmouth, Maine
A 2030 Vision and Values Process



Panta Rei
CONSULTING

Designing Inspired Futures with Organizations and Communities

www.pantareiglobal.com

TABLE OF CONTENTS

A Statement of Qualifications.....	3
Proposed Purpose, Methodology and Key Steps	5
Reference Contacts	8
Staff.....	9
Fees	12
Proposal Contact Information.....	13



Graphic images by Nancy Margulies in this document are used with permission by the artist and World Café™.

OUR QUALIFICATIONS AND APPROACH

Panta Rei Consulting has facilitated strategic and business planning for 25 years with non-profits, partnerships, schools, NGOs, state and local government agencies, and whole communities. In recent years, given rapid changes and complexity in most environments, static three or five-year plans make less and less sense. In search of more dynamic models that encourage a close link between the strategy and day-to-day operations, we now emphasize plans that are anchored in a widely held, organization or community vision of future possibility. The vision and values of a town, agency or organization provide an overarching architecture, long-term direction and enduring inspiration for the strategic or comprehensive plan. A compelling vision serves as a strategic thinking tool for town leaders faced with challenges, opportunities and decisions.

We take a fundamentally appreciative approach in all our work, building on past successes and strengths. We believe that people own what they have a hand in creating, and advocate for broad but efficient engagement of key stakeholders in any strategy initiative. We also bring to our engagements a powerful blend of qualitative and quantitative research with focus groups, interactive town hall meetings, depth interviews, story telling, and efficient electronic stakeholder surveys. Finally, we work closely with planning groups and committees, setting the table for members of the community to articulate their best visions, strategies and action plans.

Our principal consultants are highly trained and experienced in organization development, large and small group process, planning, leadership development, change management and research. We have facilitated visioning and planning with hundreds of organizations ranging from whole communities to government agencies, coalitions, nonprofits and corporations. The principal and supporting consultants who would work closely with the Town of Falmouth all live in Maine.

We often arrange our collaborative visioning and planning work under a 4-i architecture: Inquire, Imagine, Innovate and Implement. In the case of the Town

of Falmouth, where the visioning is separated from the comprehensive planning, we can imagine a process that emphasizes the Inquire and Imagine dimensions, and perhaps some of the Innovate, leaving the Implement aspects to the phase II comprehensive planning process. Our thoughts on this will be spelled out in the following Purpose and Methodology section.

Clients for whom we have recently conducted strategic visioning include:

The Student Conservation Association, Charlestown, NH and
Washington DC

The Economic Commission for Africa, Addis Ababa, Ethiopia

Strong Communities Coalition, Dover, DE

Nemours Health and Prevention Services, Wilmington, DE

Great Valley School District, Malvern, PA

State of Maine Commission for Community Service, Augusta, ME

State of Maine Department of Inland Fisheries and Wildlife,
Augusta, ME

White Mountains National Forest, Campton, NH

The Central Vermont Community Action Council, Montpelier, VT

Bose Corporation, Boston, MA

The International Fund for Agricultural Development, Rome, Italy

Family Intervention Services, Newark, NJ

The Vermont Telecommunications Authority, Montpelier, VT

The Delaware Division of Historical and Cultural Affairs, Dover, DE

The US Department of State Foreign Service Institute,
Arlington, VA

A more comprehensive view of who we are and what we do can be found on our website at www.pantareiglobal.com.

VISIONING PURPOSE AND DELIVERABLES

To build a dynamic 2030 vision with the Town of Falmouth in a way that:

- engages and strengthens ownership of the wider town community in its preferred future;
- integrates and builds on the foundational visioning and planning work conducted in 2013;
- sharpens a shared image of the town identity and brand;
- creates and feeds on conversations with and among town residents;
- embodies and clearly states the core values most important to Falmouth residents; and,
- establishes a foundation for the Phase II comprehensive planning process to follow;

thus providing the Town of Falmouth with a clear, realistic and optimistic vision to guide planning and decision making over the next decade.

PROPOSED METHODOLOGY AND KEY STEPS

We propose working closely with a designated Town of Falmouth Visioning Team, ideally including a selection of town staff and community leaders, going through several mini-workshops and a larger, interactive Vision Conference.

1) Expectations Alignment & Roadmap Development

Meet with the Visioning Team to get to know each other, collaboratively affirm goals and outcomes of the visioning process, share assumptions, clarify role expectations for the town and Panta Rei, and fine-tune the roadmap for getting there.

2) Assessment & Document Review

Review previous plans, recent stakeholder assessments, and other documents the Town considers useful. Digest all available data pertaining to Town performance. Assess trends, and what is working well and falling short in the current plan.

3) Stakeholder Snapshots and Benchmarking

Under guidance of the Visioning Team, design and conduct targeted research. This will take the form of selected interviews, focus groups, and electronic surveys of identified stakeholders: residents at large, business owners, civic leaders, the nonprofit community and others.

In our experience, engaging stakeholders in assessment always serves more than simply the purpose of gathering data. It is a vehicle for communicating your evolving mission, strengthening relationships and brand awareness, advocating for Town needs and other purposes that the Visioning Team will want to consider. All data will be organized into a single stakeholder summary document for planning use. This phase will require two four-hour workshops of the Visioning Team: an initial meeting will identify and prioritize key stakeholders and what we hope to learn; the second workshop will analyze all collected data for key messages. *Note: Although a number focus groups would be important to the visioning process, some of this work could be conducted in Phase II.*

4) Identity Workshop

In this workshop the Visioning Team reviews the stakeholder data messages and identifies key elements of the new vision and values statements. We begin to surface what is the unique essence of Falmouth. Intentionally, these are left in draft or “emerging” form. Together, we then design the Town of Falmouth Vision Conference, identifying critical framing questions

5) Town of Falmouth Vision Conference

Bring together representatives from the “whole system” (Visioning Team members, Town staff, business and civic leaders, students, educators and others) for an interactive, one-day workshop of 60-80 participants.

Using an energetic approach and several large group, visual activities, those present review the past, imagine future possibilities, and add their thoughts to the work of the Visioning Team. These follow an appreciative approach, highlighting the unique history of the Town, building on strengths while realistically considering the challenges of the present and future. People leave as ambassadors for the town, enthusiastic and ready to support the comprehensive planning process to follow.

6) Integration Workshop

Following the Vision Conference, the planning team meets for a final four-hour workshop to integrate and prioritize all Vision Conference outputs, and craft a final Falmouth Vision and Values statement. All inputs and outputs of the visioning process will be organized to be of maximum benefit of the Comprehensive Planning process.

REFERENCES FOR STRATEGIC VISIONING AND PLANNING

For feedback on our recent planning work, please feel free to contact:

Maryalice Crofton, Executive Director, Maine Commission for Community Service and Volunteer Maine, Augusta, Maine

Phone: (207)624-7792 E-mail: Maryalice.Crofton@maine.gov

Drew Gradinger, Principal, Kindle Farm School, Newfane, Vermont

Phone: (802)356-5225 E-mail: dgradinger@hcrs.org

David Carmicheal, Director, Pennsylvania Historical and Museum Commission and Pennsylvania State Archives, Harrisburg, PA

Phone: (717)783-9872 E-mail: dcarmichea@pa.gov



PROJECT STAFF

Bob Wright will take primary responsibility for this project. Jodi Paloni and Corky Potter would collaborate with selected research and conference components.

Bob Wright Principal, Project Lead

Bob Wright is an organization development consultant and leadership coach committed to helping organizations clarify and realize their missions, and to encouraging employees to bring more of who they are to what they do. In his role as a principal with the New England-based Panta Rei Consulting, Bob actively serves clients throughout the U.S. and around the globe.

Bob has designed and implemented leadership development and organizational planning initiatives throughout North America, Asia, Europe and Africa. He also works with state and local governments, schools and non-profit organizations on quality management, work systems redesign, strategic and business planning, and community-building efforts. Among his clients are 3M, Boston College, Bose Corporation, Children and Families First, Christiana Care Health Services, Daimler, the Delaware Healthcare Commission, The Economic Commission for Africa, Honda, the National Forest Service, the National Institutes of Health, Nemours Health and Prevention Services, the Peace Corps, the Smithsonian Institution, the Student Conservation Association, the United Nations, and the YMCA.

Bob holds a Masters degree in Management from the School for International Training, and a Bachelor's degree in Anthropology and Intercultural Communication from the University of Delaware. His other interests include poetry, wood-working and sailing the Maine coast.

Jodi Paloni

Jodi Paloni has worked in progressive learning communities for the past 25 years. As teacher, teacher mentor, coach, facilitator and trainer, Jodi has initiated engaging experiences that encourage people to explore themselves and develop skills as self-directed learners and personal leaders with purpose and intention. Her passion is to be of service to lifelong reflective learning, personal and professional leadership, and compassionate interactions among people around the world.

Jodi has worked with children, young adults, master educators, and elders in the pursuit of providing meaningful learning experiences. Her teaching career has led her to private and public school systems (including 16 years at Marlboro Elementary School in Marlboro, Vermont), non-profit organizations, and state agencies. Her training has included human development, instructional systems design, learning styles, group process, environmental systems, and research. Jodi has also worked for the Education Department of Antioch University New England, teaching and certifying new teachers.

She holds BS and MS degrees in education and environmental studies, an MFA in Fine Arts, and is certified as a coach by the Gestalt International Study Center and the International Coaching Federation. Jodi is the author of *They Could Live With Themselves*, a collection of short fiction that was a finalist for the Maine Book Award. Her stories have appeared in numerous magazines and literary journals. She is the founder of the Maine Coast Writers Workshops and Retreats. She enjoys her rural Maine lifestyle, stacks of books on her bedside table, and global travel.

Corky Potter

Corky Potter is a group facilitation practitioner and organization consultant with extensive experience in design and delivery of creative and powerful personal and group learning events. His work supports individuals, teams and whole systems to increase effectiveness, achieve goals, and create desired futures.

Corky works with a wide range of organizations, and specializes in creative planning. Every facilitated event is conducted within the context of each client's organizational history, culture, people, systems, leadership and desired future.

Where appropriate, he designs content-linked experiential exercises to support targeted learning or results. Schools with which he has worked on strategic planning include the University of Pennsylvania, The University of Maine, Philadelphia School for the Deaf, Friends Academy (Long Island), Friends Select School (Philadelphia), Aidan Montessori School, the Shipley School, Solebury School, the Sheridan School, among others. Corky is trained and specializes in qualitative and quantitative research to support powerful planning.

Often utilizing processes that harness the wisdom and power of large groups such as Future Search™, Open Space, and Real Time Strategic Change, Corky frequently works with “the whole system in the room.” For 25 years Corky served as Executive Director of the nationally acclaimed Shaver's Creek Environmental Center at State College, PA. A resident of Orono, he is a passionate ornithologist and a registered Maine sea kayak guide.



PROJECT FEES

<i>Proposed Activity</i>		<i>Fee*</i>
Sep 1)	Expectations Alignment/Roadmap Development (Including an initial meeting of the Falmouth Visioning Team)	\$1400
Step 2)	Assessment and Document Review	\$1200
Step 3)	Stakeholder Snapshots and Benchmarking (design, document and facilitate selected focus groups and interviews; draft and administer on-line surveys)	\$1200 per day
	Stakeholder Identification and Analysis Workshops (design, prepare planning materials, facilitation, documentation – two workshops)	\$3800
Step 4)	Falmouth Identity Workshop (design, prepare planning materials, facilitation, documentation – one workshop)	\$2800
Step 5)	Vision Conference (design, prepare planning materials, facilitation, documentation – full day conference)	\$4100
Step 6)	Integration Workshop with SDT (design, prepare planning materials, facilitation, documentation – one workshop)	\$2400

* The above pricing is inclusive of all fees, materials, and travel time.

The pricing of Step 2 depends on the number of surveys, focus groups and interviews we design and conduct. Typically, the design and administration of electronic surveys is \$3200 each, and focus groups (design, facilitation and documentation) are \$1800 each.

Proposal Contact:

Bob Wright, Managing Principal
Panta Rei Consulting
373 Old County Road
Pemaquid, Maine 04558

(207)677-2635 or (802)451-6866
bobwright@pantareiglobal.com