



**Statement of Qualifications  
Town of Falmouth**

*Submitted January 21, 2020*

**To Conduct a Public Process to Develop a Town Vision and Values  
Statement for the Town of Falmouth, Maine  
Phase One**

Sylvan Strategies is a creative communications firm with an expertise in digital strategy and community engagement. Sylvan Strategies, in collaboration with Lisa Whited, Founder and Chief Transformation Officer of Workplace Transformation Facilitation submits the following statement of qualifications for phase one of the Town of Falmouth's vision and values project and would be very interested in continuing in this role during phase two.

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**Qualifications of Team**

**Em Burnett, *Sylvan Strategies***

Em Burnett is a digital engagement professional and civic advocate with 8 years experience in communications and civic engagement. Holding a BA in International Development from McGill University, Em began their career working as a digital consultant for nonprofits at Trilogy Interactive in 2012, working with clients like Chicago's The 606 rail trail to engage with local supporters online about priority projects in their neighborhood. Em has since founded their own communications consulting firm with a focus on using digital tools for community and civic engagement. Since founding Sylvan Strategies, Em has created a niche in digital consulting for civic education and engagement, working with clients like the League of Women Voters Maine, Maine Votes, and Code for America. Em founded the nonprofit civic engagement group OpenMaine in 2012 and serves on Code for America's National Advisory Council, helping guide member engagement on the organization's value and vision work. Most recently, Em managed Kate Snyder's successful campaign for the mayor of Portland, Maine.

**Meg McCormick, *Sylvan Strategies***

For the past decade, Meg has worked with federal governmental agencies, NGOs, higher education institutions, and small businesses and specializes in project planning + management, fundraising, and community engagement. As the former Director of Programs at Maine Campus Compact, she designed and managed community and civic engagement projects across Maine and New England. Before moving to Maine, she directed the Department of Service-Learning at Northwest Indian College in WA and then helped co-found the Institute of Indigenous Foods and Traditions. As Director

of the Institute, she worked with 26 tribes developing wellness and food security programs that strengthened tribal sovereignty, growth, and resilience. More recently, she has supported the work of Campus Election Engagement Project, Maine Farmland Trust, Volunteer Maine/Maine Commission for Community Service, and Maine Creative.

**Lisa Whited, *Workplace Transformation Facilitation***

Lisa founded and is Chief Transformation Officer of WTF, a company that works with organizations and communities to ensure all voices are heard in a change process. She created a facilitation process that uses face-to-face conversations coupled with technology to generate authentic connections and conversations that lead to real change. In addition to WTF’s work with start-ups, global corporations, and NGOs, Lisa led visioning efforts for the USGBC throughout the U.S. for five years. When serving on the City of Portland’s Planning Board (2015-2018) she was Community Engagement Liaison for that city’s Comprehensive Plan 2030. In that work for the city, she purposefully included young people, going into the high schools to facilitation conversations with students. Lisa also recommended strategies to include people of color and others whose voices are often not heard at the municipal level. Recognized as a leader within her work nationally, her training as a mediator, master facilitator and designer uniquely position her for this work.

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**Statement of Project Understanding**

Our team understands that community visioning is the process of developing consensus about what future the community wants, and is a critical anchor when updating a city or town’s comprehensive plan. As consultants on this project, we will develop a participatory process that is inclusive and representative of Falmouth’s residents, and ultimately informs a vision statement that captures what community members value most about the Town of Falmouth and what they want they want their community to become.

**Phase One Goal**

Design the public process for obtaining community input on the values and vision for the Town of Falmouth and develop a values and vision statement that informs the comprehensive plan update.

**Phase One Objectives**

Our team strives to meet the following objectives in phase one:

- Design and host 5-10 in-person and online community forums
  - Receive input from 25% of Falmouth's population
  - Representation from the following groups:
    - Families
    - Youth
    - 65+
    - New residents (under 5 years)
    - Homeowners
    - Renters
    - Local business (services, agriculture, tourism, etc)
    - Organizations (nonprofits, schools, police, fire, churches)
    - Elected officials
  - Arrive at a consensus from various groups about vision and values statement
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## **Considerations of Scope of Work**

Our team will design an inclusive public process that captures the vision and values of the Town of Falmouth's residents, and renovate traditional outreach practices to include interactive input exercises and a diverse engagement plan.

We will design a public process that includes two key elements: community forums and an engagement campaign.

### **Community Forums**

In-person and virtual community forums are a critical component of the community visioning process. We have grouped these forums into four phases: vision clarification, thematic visioning, distillation, and adoption/celebration.

#### *Vision Clarification*

These sessions are highly interactive and energetic and are an opportunity for participants to build connections with each other. We will hold a series of these sessions throughout Falmouth at locations that are accessible to various groups. Based upon the results of these sessions, we will come up with our "buckets/headers" for the thematic visioning noted in the next phase.

#### *Thematic Visioning*

Based on the findings from the vision clarification sessions, we can begin grouping the results into defined themes such as climate change, elder care, education, etc. During this session(s), participants will discuss the impact of these themes on their everyday

life, examine challenges and opportunities, and ultimately arrive at consensus on community goals. We will consider coordinating a task force/steering committee for each prominent theme to ensure we are engaging important stakeholders in the community.

#### *Distillation*

In this session we will, in collaboration with community leaders and/or steering committee members, present our findings and draft of the vision and values statement. There will be ample opportunities for feedback through small group discussions, surveys, interviews and focus groups.

#### *Adoption/celebration*

It is important to come together to celebrate the success of this process and to adopt vision and values statement. In this session, we will unveil the statement, and celebrate all of those who participated. This session will also provide reflection opportunities, officially close this phase of the project and outline the plan of phase two.

It is imperative to host these forums at different times and locations in an effort to reach a diverse and representative audience. We also will use technology to have broader reach with our forums, including livestreaming forums and offering 1-2 virtual forums for community input. Each forum will have multiple opportunities to gather participant input such as world cafe discussions, small group exercises, and visual representations of visioning.

### **Engagement Campaign**

We can plan the most dynamic and interactive forums and workshops, but without an integrated engagement plan these efforts will fall flat. We need to meet residents where they are and provide them with multiple points of entry to participate, especially those who do not typically participate in local government. Our engagement plan relies on a comprehensive digital outreach plan that complements the community forums and helps drive turnout for each forum.

Digital outreach will promote a “Falmouth Vision” brand to conduct outreach to residents. This would include tactics like: digital advertising to promote community forums, the use of short videos and engaging graphic content to promote community forums and surveys, the creation of a microsite to host all engagement activities, and the creation of a mailer with an invitation to the community forums and information about online and offline engagement opportunities. A microsite (a simple, well designed website separate from a town website) would serve as a way for residents to

get up to date information on the process and provide opportunities for each resident to engage online.

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## **Similar Projects**

### **City of Portland Comprehensive Plan 2030**

Lisa served as the Community Engagement Liaison for the City of Portland's Comprehensive Plan 2030. The city's plan is based on work that began in 2015 and included a process of extensive public engagement, including attendance at farmers' markets, fairs, middle and high school classes, neighborhood group meetings, and many other events to learn what people in Portland hope for the next 10 years. In all, over 40 events were held, allowing for input from hundreds of people, as well as countless others who stopped by at large events. In addition, the city conducted a public survey to which over 2,000 people responded. After several weeks, the survey had fewer than 700 responses; the city connected with the Portland Participates initiative, founded by Meg and Em in their roles as members of the Portland Global Shapers. Together, they did a push through social media that resulted in a tripling of survey responses within a few short weeks. The new plan distills the city-wide input into concise and comprehensive visions for the future of the City. As a comprehensive plan, it serves as a policy vision for the entire city. This work was led by Christine Grimando.  
*Reference: Christine Grimando, Director of Planning & Urban Development*

### **Code for America**

Sylvan Strategies has worked with Code for America for the past 6 months on improving engagement and communication with its 5,000+ person distributed member network. By implementing a robust digital-first engagement strategy complete with surveys, emails, blog posts, and workshops, Sylvan has helped Code for America staff gain key data from its members on 2020 program priorities. Its ongoing 2020 work is in synthesizing leadership and staff values and vision sentiment with data gathered from CfA's distributed member network.

*Reference: Meredith Horowski, Senior Director, Brigade Network, Code for America*

### **Kate for Mayor**

Sylvan Strategies executed engagement and campaign strategy for Kate Snyder's mayoral campaign. Using a digital-first model, the campaign emphasized nonpartisan experience and a high level of transparency. Under Sylvan's guidance, Kate implemented a digital campaign strategy which had double the online engagement

rates of rival campaigns, on half the budget. Utilizing Sylvan's expertise in civic engagement, the campaign focused heavily on shared civic priorities like rapid transit systems, budgets, and the role and function of the mayor and intentionally highlighted nonpartisan, civic aspects over overtly political positions. The digital-first strategy succeeded, helping the campaign win every single precinct in the city.

*Reference: Kate Snyder, Mayor of Portland*

### **Stevens Square Community Center**

In the fall of 2019, the Developers Collaborative sought a zoning change at 631 Stevens Avenue (Portland), the site of the former Maine Girls Academy to a neighborhood business zone, B1, for their Stevens Square Community Center project. The zoning change was before the City Council, and needed community support to push the project forward. Sylvan Strategies coordinated all outreach efforts on behalf of the project--they gathered signatures and letters of support, managed email communications, and hosted in-person community sessions to raise awareness about this project and increase support. The rezoning passed unanimously.

Concurrent with the above work, Workplace Transformation Facilitation was engaged by the Developers Collaborative (DC) to consider the interior layout and design of the building. WTF's scope of work with this project is to ensure the physical spaces reflect DC's vision of a community center that not only serves the neighborhood's needs, but also brings individuals together to build community.

*Reference: Kevin Bunker, Founding Principal, Developers Collaborative*

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## **Contact Information**

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