

Brownfields Stakeholder Forum Kit

*A Guide to Organizing Stakeholder Forums
in Pursuit of Community Revitalization*

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Introduction

Stakeholder roundtables, or forums, are an excellent tool for helping local communities address complex, place-based, community revitalization and brownfields-related challenges. Stakeholder forums can be an effective way for communities to form partnerships to develop and implement strategies addressing specific brownfields challenges, and to identify sources of funding and garner support for revitalization goals.

EPA developed this Brownfields Stakeholder Forum Kit to enable communities to plan and sponsor effective brownfields stakeholder forums. It is intended to help localities and non-profit organizations engage stakeholders and establish partnerships to address brownfields and community revitalization issues in their communities.

Well-designed forums bring together a cross-section of stakeholders to focus their attention on a local brownfields revitalization challenge, identify specific needs, and develop strategies for mobilizing available resources required to address the challenge. Successful forums have a clear purpose from the onset and a strategically conceived agenda that will advance that purpose. The key elements of a successful stakeholder forum include:

- Setting reasonably achievable goals for a community roundtable forum.
- Identifying which stakeholders and partners should be involved.
- Structuring an effective agenda designed to meet identified goals.
- Preparing for the forum and handling logistics.
- Setting the stage for an effective follow-up.

Organizing a stakeholder forum can be an effective way to initiate a broad conversation to address the economic, environmental and quality of life issues faced by the community and propel the implementation of strategies and action plans. The information presented here focuses specifically on stakeholder forums that are designed to identify resources for brownfields redevelopment and community revitalization, but the tools and tips can be adapted to help organize effective stakeholder meetings for other purposes as well.

The Value of a Brownfields Stakeholder Forum

A Brownfields Stakeholder Forum should serve as the launch of a community's efforts to attract attention to its revitalization efforts. A gathering of the right supporters at the right time can be critical to community success.

An effective event will focus on several priority projects that have been identified by local stakeholders, including neighborhood residents, business executives, civic leaders and municipal officials. A clear vision on the reuse of these identified sites should drive the planning of the Forum. A successful roundtable will help community members build additional support, attract funding resources, and catalyze revitalization action.

Communities are ready to host a Brownfields Stakeholder Forum when there is extensive buy-in for a concrete vision or plan that puts a contaminated property on track towards redevelopment. This prioritization of sites and issues will enable the team to identify appropriate local and regional partners necessary to move those initiatives forward, as well as focus on the exact state, federal, and philanthropic funders who will be needed to support those projects. The flow of an effective Brownfields Stakeholder Forum should be organized to accomplish multiple goals: determining

redevelopment options, overcoming project obstacles, confirming funding streams, and building stronger support. The roundtable's agenda should be developed to achieve these specific goals. The day should feature a carefully considered balance of presentations, speakers, panels, breakout sessions, audience participation, and other formats. The event should be designed to foster robust participation and problem-solving that leads to commitments of action and follow-up efforts to support community priorities. It should be very clear to everyone present why they are in attendance, and what the expected outcomes are.

A Brownfields Stakeholder Forum works well when the needs are plainly identified, the solicitations for funding and support are made clear, and a sharp message is delivered. The most effective messengers for a community often are its local elected officials, respected community members, and important local business leaders. Localities that host effective roundtables often are highly successful moving their key initiatives forward, securing multiple grants for those projects, building strong community support, and forming more robust partnerships on these endeavors.

How to Use this Kit

The purpose of this kit is to guide communities through the planning process for a one-day stakeholder forum. It details how to approach each major task involved: (1) initial decisions, (2) the planning process, (3) the agenda, (4) participants and registration, (5) logistics, (6) facilitation and speakers, and (7) post-forum activities. This kit also includes a list of tasks essential to each step in the process and several examples, samples, and templates that can be used or adapted to make the job easier.

Chapter 1: Initial Decisions

The primary goal of a brownfields community stakeholder forum is to focus stakeholder attention on the revitalization of specific properties or community assets, and solicit stakeholder input and support for the implementation of a community vision for revitalization. Stakeholder forums, as depicted in this guidance, are different from “community visioning” workshops or other stakeholder outreach meetings held in the early stages of planning for brownfields redevelopment. The stakeholder forums described in this kit focus on enlisting support and resources for revitalization projects or to rally community members and stakeholders around a vision of revitalization. Such forums are typically held when brownfields planning efforts are relatively mature, and it is time to transition from the initial planning stages to the implementation phase of the project. While this guide is very specific to brownfields, the strategies and suggestions translate across many community projects transitioning from the planning to implementation stage. Successful forums may:

- Start the communication process
- Help transition a project from plan to implementation (e.g., identify funding, find private partners, gain key stakeholder approval)
- Improve project performance
- Save time and money
- Build collective enthusiasm, as well as early, realistic goals and consensus

While the details of individual brownfields projects vary, stakeholder forums generally focus on similar goals and objectives: to identify potential sources of funding, garner stakeholder support for specific elements of the brownfields project, create or strengthen partnerships for implementation of the project, and rally the community toward a shared vision. Strategic goals will help to ensure high impact outcomes from the forum. Given this focus, it is important to hold the stakeholder forum at an appropriate stage of the project. Stakeholder forums to support community revitalization projects generally work well when:

- Specific brownfields sites with redevelopment potential are clearly identified and assessed; the scope of the required cleanup is known; or cleanup of the subject properties is completed.
- The locality has a relatively clear idea of the type of reuse envisioned for the property and a vision for how it fits into the locality’s overall goals for the revitalization of the surrounding area.
- The locality has identified specific needs (such as infrastructure improvements, demolition, or other site-preparation) required to make the proposed redevelopment viable or the site marketable for redevelopment.

These characteristics signify that a project is mature and ready to transition from the initial planning stages to the implementation phase of the project.

Stakeholder forums can focus on redevelopment of a specific brownfield site, an area, or even a multi-jurisdictional region. However, these forums often work best when the focus is relatively narrow and momentum for renewal is initiated. Community leaders should use a stakeholder forum as a rallying event, or an opportunity to spread enthusiasm and garner additional energy from neighbors and stakeholders. This allows participants to hone in on the specific

characteristics of the proposed redevelopment to identify the particular challenges, promote potential solutions, gather input and support, and identify potential sources of funding to implement the vision. This approach also makes it easier to identify and inspire the key stakeholders and officials who are well-positioned to inform the process or provide support to the project.

Organizing a Planning Committee

After deciding to hold a stakeholder forum, essential first steps in the planning process are to organize a Planning Committee and engage the services of a skilled facilitator.

The purpose of the Planning Committee is to establish leadership and provide guidance on various aspects of forum planning. Perhaps the most important role of the Planning Committee is to provide the overall vision for the forum by defining forum goals, developing an agenda that will achieve proposed objectives, and identifying key stakeholders to participate in the forum.

How to Select Planning Committee Members

The Planning Committee should be small enough to be an effective working group, but large enough to include key people from the sponsoring organizations. Committee members should be trusted, natural leaders who will be able to rally the support and buy-in of other stakeholders in the community. A careful selection of members will help to attract resources and partners throughout the project. Table 1 outlines the types of committee members to consider, and the roles they fulfill through participation.

| Planning Committee Member Considerations | |
|--|--|
| Committee Members to Consider | Description |
| Senior members of sponsoring organizations | Key sponsoring organizations are those entities providing valuable resources to the project. Sponsor representatives on the committee should have the ability to make decisions and speak on behalf of the sponsor, as well as mobilize the sponsor’s resources. |
| Key community representatives such as individuals representing: - local schools - non-profits - small businesses - residents - churches - neighborhood groups Additionally, local government may be included in order to represent their constituents’ needs. | Represent the diversity of the community that will be impacted by the development. While it is impossible to include all community players, a sampling on the planning committee will help ensure the meeting’s success later on. |
| City Planners and/or development specialists | Operational and technical support to ensure planning efforts meet local laws and regulations. |
| Forum Support | A committee member dedicated to the logistics of the stakeholder forum. |
| Facilitator | A third party that can serve as a neutral facilitator during the actual stakeholder event. |

Planning Committee Coordination

It is important that members of the Planning Committee communicate regularly during the planning process, especially as the forum date approaches. The following schedule is recommended for planning calls:

- Hold monthly conference calls with the Planning Committee from the time the committee is formed until about two months prior to the forum. If possible, decide on a standing call day and time (e.g., Tuesday at 2:00 pm). Initial calls may be used to define a vision for the forum and forum goals, draft an agenda, identify key stakeholders and speakers, and determine resources needed to hold the forum.
- Once the forum is two months away, begin holding calls weekly or bi-monthly. This is the point where planning will really take off and it will be necessary to touch base on many items such as confirming speakers, finalizing the agenda, and venue coordination/room setup.

Using a Skilled Facilitator

It is strongly recommended that you engage the services of a skilled facilitator. The responsibilities of a facilitator go beyond moderating the forum. He or she can provide expert advice about how to structure and conduct the forum to reach the Planning Committee's goals. In fact, the facilitator should be in place early to moderate Planning Committee calls in a way that helps the group clearly define what organizers want to achieve and help them identify the specific stakeholders who should be in the room.

How to Select a Facilitator

A good facilitator:

- Has experience running goal-oriented meetings that are effective and inclusive
- Values stakeholders' time and ideas
- Thinks quickly and logically
- Is an excellent communicator
- Is both content and process oriented
- Is capable of maintaining objectivity
- Can redirect a discussion that has moved away from the goals and objectives of the forum

The following people should not be selected as facilitators:

- Members of the planning committee
- A city employee who has his or her job invested in the outcome
- The councilperson or any elected official with a re-election agenda
- The developer or other project lead

Facilitator Responsibilities

The facilitator should be involved in the planning process from the beginning to provide expert advice on developing the agenda, preparing effective presentations, setting up the room, and offering effective ways to encourage interaction between participants during the forum. In addition, the forum facilitator acts as a point of contact and usually coordinates with speakers and panelists to:

- Brief them about the goals and objectives of the forum.
- Provide specific guidelines, such as the time allotted for their presentations or contributions to a panel discussion; key points to cover; the use (or non-use) of PowerPoint presentations, videos, or other AV aids; and how and when questions will be handled during the forum. If applicable, the facilitator may wish to collect presentation materials or handouts in advance to ensure the event runs smoothly.
- Prepare speakers by holding a “dry run” or preparation call with speakers or panelists several days before the forum to review what will happen on the day of the forum including: how each session will be facilitated, what the room setup will be, and to answer any questions they may have. These preparatory calls are important to ensure that speakers or panelists understand what is expected of them and that things go smoothly on the day of the forum.

Defining Forum Goals and Objectives

To ensure an effective stakeholder forum, the Planning Committee must define specific, achievable goals and identify the issues and project elements that the forum will discuss. The goals should be organized around a few key brownfields properties.

How to Decide Forum Goals and Objectives

Key questions that the planning committee and facilitator should consider when defining a forum’s goals and objectives include:

- What information does the team want to share with the stakeholder group?
- What information does the team need from the stakeholder group?
- Does the team need the stakeholder forum participants to make any specific decisions?
- What obstacles could potential participants help the community overcome?
- What resources does the team wish to attain from the stakeholders? This could include technical assistance, funding, community buy-in, general advice, etc.
- Is there an overarching theme, such as sustainable development, that may help to shape the goals and objectives of the forum?
- Are there any time constraints or windows of opportunity to consider?

Examples specific to brownfields may include:

- Identifying necessary site improvements and additional amenities that could make the site more attractive to potential tenants or developers; these may include green features or new technology.
- Finding additional sources of funding for cleanup, infrastructure improvements, or site preparation.
- Identifying potential development restrictions resulting from cleanup status.

It is very important that a forum not have too many goals or objectives. Instead, a stakeholder forum should focus on the most important issues for a specific site or defined area at this specific time. Ideally, the planning committee should establish SMART objectives. These are **s**pecific, **m**easurable, **a**chievable, **r**elevant, and **t**ime-bound.

While it can be useful to bring together groups of stakeholders from throughout a multi-jurisdictional region to discuss brownfields issues, the most effective stakeholder forums tend to address brownfields in a single city or town, area, or neighborhood. This allows participants to bring their expertise on specific issues, challenges or elements of the project under discussion.

Once forum goals and objectives are clearly defined, the Planning Committee can identify key stakeholder groups and individuals who should be involved in the discussions and develop an agenda.

Chapter 2: Materials to Prepare Prior to the Forum

Visuals and handouts are valuable features of a well-planned stakeholder forum. Handouts give participants something to take home and reference following the forum. Meeting materials also allow participants to follow along with the discussion and stay engaged. Visuals and handouts should be created in advance of the meeting by the planning team or forum lead. Materials to consider are:

- Maps and other visuals help explain specific challenges and help participants visualize the subject site or area and the amenities and challenges associated with the project.
- Biographical information on key contacts and local speakers provide participants with additional information about speakers throughout the day, including their qualifications and areas of expertise.
- A briefing sheet on the project can be prepared to succinctly convey the scope, objectives, benefits, status, progress, supporters, funding secured, challenges, and outstanding needs of the overall project or for each major component of a large project. Briefing sheets should be relatively short (two pages or less), include specific funding requests, include points of contact for inquiries, and be continuously updated as goals are met, funding is secured, new partnerships established, and project changes arise. *(A sample briefing sheet is provided in Appendix A of the appendices section)*
- If feasible, develop a “Resource Roadmap” for the project that identifies project priorities, key components, and estimated costs. This can serve as a useful resource for people interested in learning more about the project. It also will help stakeholders understand where their resources may best fit into the overall project. *(A sample Resource Roadmap is provided in Appendix B of the appendices section)*

Keep all materials succinct and to the point. Incorporate graphics or visuals to grab the attention of attendees.

Chapter 3: Developing an Agenda

To move a brownfield project toward a neighborhood or community revitalization project, a stakeholder meeting must have a focused agenda that informs the audience of the proposed project goals and benefits, and solicits assistance and participation from attendees. There are many ways to design an agenda, but at a minimum the following elements must be addressed within the agenda:

- Meeting Goals
- Project Overview/Description
- Project Goals
- Project Benefits
- Current Project Status and Projected Timeline
- Audience Input and Participation
- Follow Up/ Action Items

A strategic agenda groups related objectives and activities together to aid in the sequencing, presentation and reinforcement of content. A successful agenda is designed with the meeting's goal in mind: moving a project toward funding and implementation. Some of the elements of an effective agenda are discussed below.

If an optional site tour is planned, it also should have a carefully planned agenda and itinerary designed to complement the goals and objectives for the meeting. (See page 13)

Opening Remarks (Welcomes and informs participants of the meeting goals)

Begin the day with opening remarks. Opening remarks are best if presented by a local government official (e.g., the mayor) or local leader with familiarity of the project. The remarks should be brief: welcome and thank everyone for attending, identify the meeting goal, and reiterate that organizers are seeking their input and expertise. Having a top official kick off the day is one way to show participants the commitment to, and the importance of, brownfields redevelopment. This can include the mayor or city manager. If available, remarks from a state or federal legislative representative can follow. Regardless of who does the actual speaking, the opening remarks will set the stage for an exciting and productive day.

At this time, the facilitator may also want to say a few words about the order of events and share information about the venue, such as the location of breakout rooms, restrooms, etc.

Project Overview/Description (Outlines project goals, benefits, current status and projected timeline)

After opening remarks, an overview of the project area will help get the audience on the same page for discussions to come throughout the day. The overview should include the site's history, recent uses, environmental issues, etc. If the community's vision has a clear theme, such as sustainable development or a focus on public health or improving quality of life for residents, be sure to introduce the theme at this time. The project overview is one place on the agenda where a

PowerPoint presentation can be helpful. Provide pictures and maps that enable participants to visualize the area, see existing infrastructure and pinpoint the locations where there may be environmental issues. Also discuss potential future uses for the site or area. If possible, include maps and drawings that show what is envisioned for the area, including the locations of proposed buildings, roads, greenspace or green infrastructure elements, and anticipated future development of the surrounding locality. Hardcopies of the site plan may be printed in advance and pinned up in the room or laid out on a table for reference throughout the day. This is also a good time to distribute any general handouts that were prepared, such as pictures of the site or area, a short video of the project area, or aerial maps. Additional handouts may be distributed during panels or breakouts, as appropriate.

The overview presentation can be made by a panel of local officials, including the key planning and environmental staff who are knowledgeable about the details of proposed redevelopment and each component of the project. In addition to describing the proposed project that is the focus of the forum, panelists should discuss why redevelopment of the site is important, how it will impact the surrounding community and help meet community needs, what other benefits are expected, and how the project fits in with a wider vision for the community. Explain what must be done to accomplish the redevelopment goals, including the barriers that must be overcome and the resources that will be needed to accomplish it. The panel should also touch upon the current status of the project and share a projected timeline. **Most importantly, tell the group what you are asking of them: Identify the specific challenges or components of the project for which organizers are seeking input, advice, technical assistance, partnership, and funding, from the various stakeholders assembled.**

The project overview sets the tone for the day. It should capture the attention of stakeholders and build energy and enthusiasm for the discussions ahead. The presenter should take the time needed to set the context; however, it is important to keep the overview from becoming too drawn out and detailed. Additional information can be delivered in later sessions. If the project needs a more comprehensive introduction than time allows, a site tour may be arranged in advance of the forum to assist stakeholders in visualizing the layout of the site and the surrounding properties and structures.

Panel Discussions (Audience Input and Participation)

Once the opening remarks and project overview are complete, the discussion should shift to a conversation about possible resources available for the project. This discussion is often best set up as a panel of representatives from various funding institutions and technical assistance providers, each speaking to participants about the resources his or her organization can bring to the project. Representatives should be provided with copies of the project briefing sheet and resource map (if such documents are available) prior to the forum so that the panelists can address resource needs and potential solutions during this panel discussion. Local project team members should prepare questions for panelists ahead of time and be prepared to discuss specific resource needs. This part of the program can also provide an excellent opportunity for the local project team to obtain information on when funding applications may be available, what type of

matching funds may be needed, and the qualities inherent in success applications. Depending on the number of agencies or organizations involved, several smaller panels organized around particular project components (e.g., assessment, planning, demolition, cleanup, construction, infrastructure, etc) may be needed.

Panels should be designed to best support the goals and objectives of the forum and target the resource needs of the brownfield revitalization project. Panel participants should come from federal, state and regional agencies, philanthropies and private-sector stakeholder groups that have technical expertise, funding, and other resources that may be tapped to support the effort. Choose panelists with care: Panelists should represent the specific agencies or programs with resources and expertise to offer, and be the individuals with day-to-day responsibility for, and knowledge of the ins-and-outs of their grant or loan program. Often, this is a mid-level manager rather than the head of an agency or program.

Panelists should interact with the audience and with each other in a conversational way. The facilitator should work with panelists well in advance to ensure that each focuses his or her remarks about how individual agencies or organizations might be able to offer funding, technical assistance, or other resources to address the challenges identified or to finance specific components of the project. Discourage the use of PowerPoint presentations, which often are “canned” and too general to be useful. The facilitator might consider using a question-and-answer format to focus the discussion and encourage interaction among panelists and with the audience. Even if a question-and-answer format is not used for the entire panel discussion, time should be allotted at the end of the panel to allow for audience questions.

If you would like to invite elected officials, or higher-level agency officials or managers of federal or state programs, consider offering them time to speak during a lunch keynote or panel. This provides officials time to address the group and express their support of the effort without having to commit to a more participatory role in the forum.

Exchanging Ideas and Collaboration (Audience Input and Participation)

While much of the morning is devoted primarily to the presentation of specific information, the afternoon sessions should encourage a freer exchange of ideas among participants. Incorporate opportunities for interaction by using breakout sessions or availability sessions.

Possible formats for afternoon sessions include:

- Breakout sessions
- Availability sessions
- Q & A
- Workgroups (facilitated exercise or case studies)

Breakout sessions allow participants to meet in small groups to consider specific topics or project challenges. In advance of the session, identify several key questions or topics for each of the small groups to discuss. Ask participants to join the small group that is discussing the topic that

most interests them, and give them a fixed amount of time (between 30 and 60 minutes) to discuss and brainstorm. At the end of the time, ask each breakout group to report out to the larger group on its discussion.

Availability sessions, on the other hand, allow participants to meet individually with some of the panelists informally to ask questions, share additional information, or discuss issues of concern. For these, a time is set aside to allow participants to visit individually with a panelist for a short time. During the hour (or so) set aside for the availability session, panelists (e.g., representatives from agencies with funding potential and available technical assistance resources, representatives from philanthropic organizations, representatives from developers) are available in various rooms or corners of the room and participants have an opportunity to touch base with one or several panelists. It can be helpful to have a sign-in sheet for each panelist and ask participants to sign up for a short time slot (five or ten minutes, for example, depending on demand) during which they will have their one-on-one time with the panelist. The idea is to encourage participants—each of whom was invited because of his or her expertise or ties to an important stakeholder constituency—to contribute to the discussion and have an active part in helping solve the challenges at hand.

Wrapping Up (Follow Up/ Action Items)

Finally, reconvene the entire group at the end of the day to review what was learned and to identify next steps or action items. This is a good time to have the mayor, city manager, or other high-ranking local official thank speakers and participants, reiterate what was heard, and tell stakeholders the specific steps the locality will take to build on momentum generated at the forum. Provide an avenue for participants to submit additional feedback, such as an evaluation sheet or the contact information of the facilitator and set a deadline for receiving comments.

Optional Site Tour

A guided bus tour provides participants, specifically those from out of town, with prospective on project amenities and challenges, gives the participants a sense of reality for the project, and helps participants visualize the surrounding area. These tours are typically optional and work best when they are held the evening before or the evening following the forum; holding a site tour during the forum will take time and value away from the one day meeting. While site tours allow participants to get an even greater understanding of the project, one thing to consider is that the tours take time and resources to plan and execute. You will have to make arrangements for a bus, bus driver, and a tour guide; develop a tour itinerary; and prepare talking points for the tour. Before planning a site tour, look into the availability of free bus transportation, typically donated by a local company or government entity. If you choose to plan a site tour, advertise the tour in the forum invitation to alert invitees about the event.

Additional Tips for an Effective Agenda

- Do not plan an entire day of “talking heads.”
- Be careful not to pack too many speakers or too much information into the agenda.
- Allow for some interaction to keep participants attentive, interested, and involved.
- Allow ample time for questions throughout the day.
- Networking among participants is important, so try to plan breaks of sufficient length to allow participants to mingle.
- Time management is critical. Assign a timekeeper for each room.
 - For groups of more than 15 people, do not have everyone in the room introduce themselves. This takes time away from the overall goal of the forum.
 - Be realistic about the amount of time you allot to each session and enforce time limits.
 - Going over the allocated amount of time set aside for one session takes away from the other sessions and presenters who spent time preparing for discussion.
 - Keep panels manageable, keep introductions brief, and provide sufficient time for each panel member to make a meaningful contribution. For example, allot at least an hour for a panel that includes five or more speakers. Panels with fewer speakers generally can be more interesting and effective. Allow ample time for discussion.
 - Give speakers specific background information and guidelines for their talks.

Sample Agenda – This sample is based upon a forum held in Huntington, WV in December 2015. This sample is meant to be a reference only and can be customized.

Sample Forum Agenda

8:30AM

Registration

9:00-9:15AM

Welcome and Introductory Remarks

- Mayor or local political leader; state or federal representative, introduced by the Facilitator

9:15-10:15AM

Overview of the Site

Facilitator moderates a panel of local and regional leaders who present an overview of the subject site, area or neighborhood and discuss its history, recent uses, environmental issues, etc. This session also includes a discussion of the revitalization goals, challenges, and key initiatives for the site or area.

10:15-10:30AM

Break

10:30AM -12:00PM

Discussion of Available Resources I – EXAMPLE: Role of Philanthropy in Community Revitalization

Facilitator introduces representatives from federal, state and regional agencies, philanthropies and private-sector stakeholder groups who discuss their technical expertise, funding, and other resources that may be tapped to support the effort. For the purposes of this example, local and national leaders in non-profit revitalization, philanthropy, and impact investing will discuss their potential role in community revitalization and collaboration with the public and private sectors.

Moderator: Facilitator or a Representative from a prominent local philanthropy

Panelists: Various leaders of local philanthropies

12:00-1:15PM

Lunch with Speakers Forum

Facilitator introduces remarks from invited senior leaders of federal agencies

1:30-3:20PM

Discussion of Available Resources II – EXAMPLE: Federal & State Agencies

Representatives from federal, state and regional agencies, philanthropies and private-sector stakeholder groups discuss their technical assistance, funding, and other resources that may be tapped to support the effort. For the purposes of this example, state and federal agency officials will identify strategies for inter-governmental and inter-agency coordination to help the City pursue its initiatives and overcome challenges. It may make sense to divide this discussion up into separate panels due to the high number of Federal and State Agencies.

Moderator: Forum Facilitator

Panelists:

U.S. EPA Panel

- EPA Regional representative

State Officials Panel

- Representatives from various state Agencies

Federal Agencies Panel

- Representatives from various Federal Agencies

3:20-3:35PM

Break

3:35-4:05PM

Interactive Session

An interactive session that allows participants to interact freely with panelists and other participants to ask questions, share additional information, or discuss issues of concern. This session could include a time for small group breakouts, or an interactive question and answer panel.

Moderator: Forum Facilitator

4:05-4:15PM

Wrap Up & Key Next Steps

- Mayor or local political leader; state or federal representative

Chapter 4: Identifying Stakeholders to Invite

Developing a well-curated invitation list is a very important part of the planning process. Be sure to include representatives of all of the key stakeholder groups that would be involved if you were forming a partnership. It will be relatively easy to identify the stakeholder groups that should have speaking roles on the agenda, but also be sure to invite representatives of the groups and constituencies that won't have a role on the agenda but ought to be involved in the broader conversation. This might include important business and industry groups, nonprofits, and neighborhood organizations, if appropriate. The challenge will be finding the right balance—being as inclusive as possible while keeping the group manageable and concentrated on the specific issues that are the focus of the forum.

Key Entities to Consider:

- Local, State and Federal Elected Officials
 - Local: Mayor's office, city council, county executive
 - State: State senator or assemblyman, governor's office
 - Federal: Local congressional representative
- State and Federal Agencies with potential resources
 - State: Environmental or natural resources agency, transportation department, housing department
 - Federal: EPA, EDA, HUD, DOT, and DOL
- Business Leaders
 - Chamber of Commerce
 - Rotary Club
 - Major Anchor Institutions (large entities that have a large stake and important presence in the community, such as locally based corporations, colleges and universities, and medical institutions)
- Local Planning Officials
 - Local planning board representatives
 - Local economic development office or division
- Non-Profits with related interests
 - Houses of worship
 - Land trusts
 - Community Development Corporations
 - Environmental, economic development, community revitalization or other local non-profits
- Entities in the vicinity of the development
 - Local businesses
 - Community residents and additional pertinent community groups
 - School board members
- Philanthropic groups
 - Community foundations
 - National or regional foundations based in or near the community
- Technical Experts (e.g., real estate attorneys, local environmental engineers)
- Potential developers or development companies

Creating an Invitation List

Once forum goals are defined, schedule a conference call with the Planning Committee to begin compiling a list of potential invitees. Create a Master Invitation List in Microsoft Excel. Keeping a master list on a spreadsheet will allow you to easily export information from one source for many uses—preparing a participants or registration check-in list, making name tags and other registration materials, sending email invitations, and tracking RSVPs (if you are not using an online registration system) and attendance. Columns should include name, organization, email, in addition to columns for notes, invited, and RSVP'd. If an online registration system is used, it is not necessary to keep track of RSVPs in the spreadsheet. Be sure to have email addresses for all invitees as most communication will be done via email.

Sample Invitation List

| Last Name | First Name | Organization | E-mail | Notes | Invited | RSVP |
|------------------|-------------------|---------------------|--|-------------------------------------|----------------|-------------|
| Doe | John | EPA | j.d@email.gov | | Yes | Yes |
| Smith | Ellen | Washington, DC DEP | ellen.smith@email.com | Recently added, invite not yet sent | | |
| | | | | | | |
| | | | | | | |

In addition to identifying the agencies and stakeholder groups that should be included, the Planning Committee should identify the specific individuals who should be invited as speakers or panelists, or simply to participate in the forum. Here, the Planning Committee's network of contacts and knowledge of who is a good speaker (and who is not) and which individuals are likely to provide useful insights on various aspects of the project will be essential. As mentioned previously, sometimes this means inviting a mid-level manager instead of a higher-ranking official. It is worth taking extra time to carefully deliberate at this step in the process, because the success of the forum can depend on ensuring that the most knowledgeable people, and those most able to speak about specific programs and available resources are present.

Chapter 5: Selecting a Meeting Date and Venue

A date and venue should be selected before invitations are sent out so that this information can be included in the invitation.

Selecting a Time and Date

Once a list of invitees is completed, a time and date must be selected that is convenient to the majority of participants. The planning committee needs to consider several factors when deciding this:

- Availability of panelists.
- Availability of meeting location (details on selecting a room are found later in this guide).
- Are there any other meetings, conferences or events that may prevent invitees from attending at a particular date and time?
- Do any holidays fall near the event for which participants may be traveling or busy making preparations?
- Is the time conducive to allow participation by community members with full-time jobs that are unrelated to these issues?

Taking all of these factors into consideration, and doing the needed background research will ensure that the selection allows for optimum participation.

Selecting a Venue

When selecting a venue for the forum, it is important to first consider the convenience to stakeholders. It should be relatively easy for them to travel to, and ideally be located near public transit (if possible). Ample parking must be available for larger forums and forums not near public transit. Be sure to identify if there are any associated fees for parking. The selection of a venue within the project area may help to further demonstrate commitment to the community.

Secondly, the size of the audience needs to be considered. Typically, about 75 to 80 percent of those invited will attend. You want to select a room that can fit the maximum number of participants (100 percent attendance), but will not be too big if the response to the invitation is lower.

Chapter 6: Sending Invitations

Invitations should be sent out as soon as possible once the stakeholders are identified and the venue and date are selected.

Sending Invitations

- **It is important to alert potential participants about the forum as soon as possible.** Invitations should be sent at least six weeks prior to the forum. Invitations should include the following information: forum purpose and goal, date, time, venue, registration instructions, and contact information. A draft agenda may also be attached. (*A sample invitation is provided on the following page.*)
- If all of this information is not available six weeks prior to the forum, a simple “Save the Date” should be sent. Include basic information about the forum—its purpose, date, and location (even if a specific venue has not yet been identified). (*A sample Save the Date is provided on the following page.*)
- The email invitation should come from a familiar name or organization and the subject line should be compelling. If invitees recognize the name of the sender, they are more likely to open the invitation.
- Invitations may also be enhanced with a picture or rendering of the site. An image can spark enthusiasm and may help stakeholders to connect with the project.

If you are expecting any out-of-town speakers or participants, create a logistics sheet and send it out with the invitation. A logistics sheet contains the addresses for and directions to/from the airport, forum venue, and hotel information. This is also a good way to distribute information about any other activities (site tours, field trips, group dinners) that are planned in conjunction with the forum. (*A logistics sheet template is provided as an appendix at the end of the toolkit.*)

Sample Save the Date and Invitation Letters

Huntington MVD Forum – December 2015

Subject Line: SAVE THE DATE: Making a Visible Difference in Huntington, WV Cosponsored by the City of Huntington and the U.S. EPA

The City of Huntington and the U.S. Environmental Protection Agency will cosponsor a “Making a Visible Difference in Communities Forum” in Huntington, West Virginia on Tuesday, December 8, from 9:00 am to 4:30 pm at the Huntington Big Sandy Civic Center. The forum will bring together invited guests from federal, state and local agencies, community-based organizations and philanthropic organizations to focus attention on addressing community challenges and pursuing sustainable community solutions on brownfields, green infrastructure, Ohio River waterfront restoration, and economic and community revitalization in Huntington. A formal agenda, invitation, and information about registration will follow. If you would like to register for the forum, please visit the following registration page: *[insert registration link here]*.

In the meantime, please do not hesitate to email me at yourname@webaddress.com if you have any questions. We look forward to seeing you in Huntington.

Huntington MVD Forum – December 2015

Subject Line: INVITATION: "Making a Visible Difference" Forum in Huntington, WV Cosponsored by City of Huntington and U.S. EPA

I am pleased to invite you to the "Making a Visible Difference in Huntington Forum" to be held on December 8 in Huntington, West Virginia. This forum will assemble partners from local, regional, state and federal government, together with not-for-profit, philanthropic, academic, and private sector leaders. The forum will provide an opportunity to discuss how inter-governmental, inter-agency, and public-private partnerships can help Huntington overcome economic and community challenges, and make progress on revitalization initiatives, particularly along the Ohio River waterfront and the Highlawn neighborhood. For background on Huntington and its community revitalization initiatives, please see the "Huntington Innovation Project" report at the following link, particularly information about Huntington's riverfront and brownfield revitalization efforts at pp. 24-29 of that report.

www.cityofhuntington.com/assets/pdf/document-center/COH_Proposal_FINAL.pdf.

I have attached the December 8 forum draft agenda. Please note, EPA Region III Administrator Shawn Garvin will be in attendance to share introductory remarks in the morning and speak alongside his federal colleagues over lunch. To register to participate in the December 8 forum, please visit: *[registration link here]*. Registration closes on Monday, November 30.

We appreciate your participation, and look forward to seeing you in Huntington soon!

Chapter 7: Communication and Coordination

Because there are so many moving parts while planning a stakeholder forum, it is important to remain in contact with the different players (the Planning Committee, speakers and panelists, participants, etc.) to remind them of upcoming dates and ensure everyone is on the same page when it comes to planning details.

Forum Participants

- Send a registration reminder via email to the master invitation list one month before registration closes, and another during the week registration closes. This is especially important if registration numbers are low. The last-minute reminder email is a good way to spark more registrations.
- Send a forum reminder email to all registered participants one to two weeks prior to the forum. Include forum day, time, location (be sure to include the room name or number). If there are special parking or building entry instructions or if a box lunch/breakfast will be included for a charge, include those details at this time. Attach the final agenda.
- Be prepared for an onslaught of calls and emails after every email sent to the invitation or registration list.

Speakers and Panelists

- It is important to stay in contact with speakers and to give them detailed information about how to plan for their participation. This should include information about the forum and its audience; how the forum will be facilitated; whether they will be on a panel, and if so, what the purpose of the panel is; who other participants are; the length of their presentation; and the key points they should cover; use (or non-use) of PowerPoint presentations; and how questions will be handled.
- After a speaker is confirmed, contact them periodically to answer any questions they may have or discuss forum logistics.
- Once the agenda is finalized, send speakers/panelists a copy and confirm their slot on the agenda.
- Reach out the week before the forum to confirm their participation, the time the forum begins, and the time they will be speaking (if they are not involved all day).
- Decide who the on-site speaker contact will be and point them out to speakers upon their arrival at the forum. This person will direct them where to go and answer any questions they may have on-site.
- If panelists do not intend to stay for the entire forum, ensure they arrive at least 15 to 20 minutes prior to the start of their panel. Ensure they know where their on-site contact will be located when they arrive.
- If possible, hold at least one teleconference with panel members and speakers a few weeks prior to the forum to discuss the goals of the forum and prepare for the session.

Chapter 8: Logistics - Room Setup

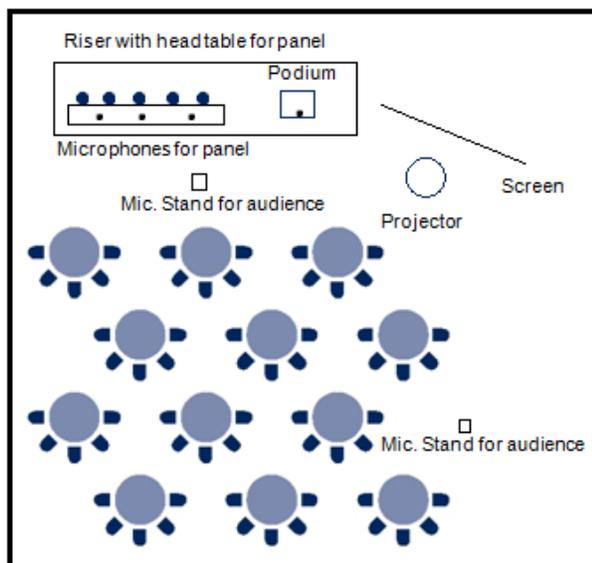
Logistics play a huge role in shaping attendees' opinions of an event. It is important for the event to be well organized and carefully planned to ensure that the meeting runs smoothly and participants are comfortable. Sloppy logistics can seriously affect the efficacy of the meeting. If people cannot see or hear speakers or if the room is not sized to accommodate participants, even the best agenda and more effective panels will not produce a good meeting. Poor planning can cause attendees to feel the forum is not very important, and that little care was given to its planning. While this may be far from the truth, it leaves a poor impression on attendees being asked to buy into a project.

Room Setup

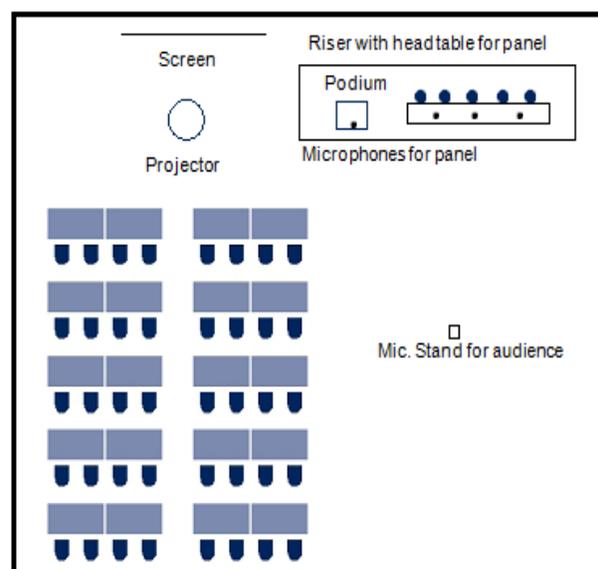
The type of room setup greatly depends on the events scheduled throughout the agenda, and what is most conducive for allowing the appropriate type and degree of participation between and among speakers, panelists, and forum participants. Small group discussions will work better with certain room configurations, such as rounds or crescent rounds, whereas classroom setups work better when the entire room is focused on speakers or presentations occurring at the front of the room.

Crescent rounds (shown below) generally work best to encourage forum participants to interact with each other and to participate in the forum. Crescent rounds are round tables with chairs set only on one side so that no one has to sit with his or her back to the speaker. If registration numbers are high, the standard full round setup or classroom setup (shown below) also will work. If available, putting speakers and panels on risers is a good idea to ensure that the audience can easily see all of the speakers.

Keep the room in mind when selecting a room setup. Crescent rounds/regular rounds require a bigger room than a classroom-style setup where participants are in rows with small tables in front of them. Also keep in mind any obstructions (pillars, walls, doors etc.) in the room that will affect the setup.



Crescent Round Setup



Classroom Setup

Chapter 9: Logistics - Audio Visual

It is ideal if the meeting venue or meeting host can supply the audio visual equipment, instead of relying on presenters to bring their own. This leaves much less room for an individual to forget their equipment and for the equipment to interface incorrectly with other facility-provided equipment. Coordinate with the facility ahead of time and identify a point of contact to provide technical support and troubleshooting on the day of the forum.

The following equipment is necessary for a successful forum:

- Laptop (for PowerPoint presentations).
 - Have speakers send copies of any presentations 2-3 days prior to the forum, and have their presentations pre-loaded onto the laptop
- Projector and Screen.
- Wireless slide advancer with built in laser pointer.
- Microphones (depending on the size of the room):
 - One on podium.
 - One or more on head table for panel, depending on the number of speakers.
 - One or more on stands throughout the room for the audience, or with the designated microphone runners.
- If the venue does not have a built-in speaker system, speakers for the microphones will be necessary.
- If videos will be played during any of the presentations, it is important to discuss this with the venue and ensure that they connect the laptop to the loudspeakers so video sound can be heard.
- At least two flip charts and markers; more if breakout sessions are planned. This will allow for active note taking and idea gathering throughout the forum, as needed.

AV Tips

- Ensure you have enough microphones for the number of speakers on a panel. They can share microphones, but allow at least one microphone for every three panelists. Insist that panelists use microphones.
- Conduct an AV test the afternoon prior to the forum to ensure there are no issues the day of the forum. Be sure to test the wireless signal and if necessary, be prepared to share the password with stakeholders.
- Save all presentations to the desktop screen on the laptop before the day of the forum. Open and test each one prior to the presentation. Have copies of all conference materials on a USB flash drive.

Chapter 10: Registration and Other Forum Logistics

- Decide how registration will be conducted before sending out invitations. Clearly explain the registration process in the invitation. Options include:
 - Participants email the forum contact their RSVP and the registration contact person will keep track of RSVPs in the invitation spreadsheet.
 - Participants will register for the forum using a registration website approved for use by the organization. For example, Eventbrite (www.eventbrite.com), a commercially available site that is approved for use by EPA and offers free registration pages in a variety of languages.
- Before closing registration, do a cross-check between the registration list and the agenda and add anyone who is on the agenda but is not registered.
- Close registration one to two weeks before the forum date. Inform anyone who tries to register after the registration deadline that they will be able to register on-site. Keep in mind when selecting the registration cutoff date that you will need two or three days to create registration materials and time to ship them to the venue before the forum, if you are coming from out of town.
- If items must be shipped to the forum, decide on an appropriate ship date. Identify a point of contact to receive the items. The forum materials should arrive at least one day prior to the event. If the event starts on a Monday, items may have to arrive on a Saturday. For most forums, it is suggested to ship at least three days prior to the forum to save money with two-day shipping and still ensure that materials arrive on time.
- Take the shipping date into account when creating all forum materials. For example, if shipping on a Thursday, the registration list should be proofed and finalized at least three days prior to the shipping date to allow ample time for creating badges and table tents.
- Items to ship or take to the forum, include:
 - Name badges and holders for all registered participants.
 - Blank name badges and name badge holders for walk-in participants.
 - Table tents for all speakers on the agenda, if appropriate.
 - Blank table tents.
 - Two copies of the registration list to check off participants as they arrive.
 - A blank sign-in sheet for walk-in participants (*A blank walk-in sign-in sheet is provided in the attachments section*).
 - Sign-in sheets for media, if appropriate. (*A blank sign-in sheet is provided in the attachments section*)
 - Return FedEx labels and boxes to ship any unused items back to the office.
 - Packets or forum handouts. Items to include:
 - Agenda
 - Participants list
 - Forum presentations
 - Any materials developed (See page 9)

Chapter 11: On-Site Activities

Be prepared for a long but fast-moving day on-site. These tips will help you prepare and guide you through the day.

- If traveling to the forum, ensure that all forum boxes shipped to the venue have arrived.
- Set up a meeting with the venue staff, the forum facilitator, and any available Planning Committee members for the afternoon prior to the forum to do a walkthrough of the venue, ensure that the room setup is correct and works in the space. Set up and test all AV equipment (if possible); set up registration.
- On the morning of the event, arrive at the venue at least two hours prior to the start time on the agenda. Some participants will arrive early, and you will need to have everything in order before participants arrive. Put up any signs, set out any materials, and finish preparing the registration table. Test the AV equipment to ensure it is working properly.
- Registration staff should be at the registration booth or table an hour prior to the registration time on the agenda. Upon arrival, the registration lead should check off each registrant on the registration list and hand them their badge and any packets or forum materials.

Chapter 12: Follow-Up Activities

A successful forum will result in numerous ideas, action items, and most importantly, forward momentum for a brownfield project. Without thorough follow-up to capitalize on the opportunities identified and effectively use the enthusiasm generated, even the most successful stakeholder forum will be of limited value.

Use the information gleaned from the forum discussion to generate a comprehensive list of action items for follow-up. These will include the specific actions identified during the meeting but also additional actions that may be identified after later reflection upon forum discussions. Recommendations for follow-up after the forum include:

- Schedule a follow-up conference call with the Planning Committee one or two weeks after the forum, while the process and the forum still are fresh in everyone's minds. Topics on this call should include:
 - A debrief of the forum. If applicable, share notes from the forum in advance of the call.
 - A debrief of the planning process, including lessons learned and steps that should or should not be repeated in subsequent forums.
 - A recap of action items with individuals responsible for each.
- Create a list of all on-site participants using the check-in list and on-site sign-in sheets used to register participants.
- Soon after the forum, send an email to forum participants thanking them for their participation and contributions to the forum. Attach the final participants list. It is a good idea also to recap the discussion highlights and the action items that were identified during the discussion. If forum materials are posted on a website after the forum, this email should contain that link.
- To keep momentum going, plan on sending updates periodically to participants with information about follow-up activities undertaken as a result of the forum.

Forum Task List

| Task | Deadline | Notes |
|---|--|--|
| Initial Planning Decisions: <ul style="list-style-type: none"> Organize Planning Committee. Identify a forum facilitator. Define forum goals and objectives. | As soon as you decide to hold a forum. | |
| Customize this task list for your forum, with actual dates and send it to the Planning Committee. Discuss and confirm Task List. | At least three months in advance of the forum. | |
| Planning Committee Kickoff Call. Items to discuss: <ul style="list-style-type: none"> Planning team roles. Further discussion of forum goals and agenda topics. Identify potential speakers and panel participants Determining who to invite. Timeline of events. | Hold initial call when Planning Committee is established, then hold at least monthly calls. Hold calls twice a month once forum is two months out. | If possible, try to plan a standing conference call, (e.g., every first Tuesday at 2:00 pm). This will make it easier and reduce the time spent scheduling planning calls. |
| Develop Agenda Begin drafting agenda. Finalize agenda. | <ul style="list-style-type: none"> As soon as planning begins. At least two weeks prior to forum. | Get firm commitments from everyone listed on the agenda. Name several alternates in case there are speaker cancellations. |
| Identify Stakeholders to Invite Begin compiling invitation database. Finalize database. | <ul style="list-style-type: none"> Once planning begins. Seven weeks prior to forum. | |
| Select and Book a Venue <ul style="list-style-type: none"> Inquire about places that will offer the space for free. Venue should be easy to find and travel to. Venue should be handicapped accessible. Venue does not need to be walking distance from a hotel. | At least two months prior to forum. | |
| Book Hotel Room Block <ul style="list-style-type: none"> Room block should be requested for the government rate or the lowest possible rate you can receive. Hotel does not have to be walking distance to the venue, but it should be an easy commute. Reserve the block under the same name as the forum. | Two months prior to forum. | If you are expecting only a few out of town participants, you can skip this step and simply make note of the best hotel for participants to stay on the registration website or in the invitation email. |
| Meeting Logistics Create logistics sheet containing venue and hotel information that participants will need. | At least six weeks prior to forum. | Have this information ready in time to send with the forum invitation. |
| Invitations Send invitations. Manage RSVPs. Send registration reminders. | <ul style="list-style-type: none"> Six weeks prior to the forum. As received. One month prior to registration deadline. One week prior to registration deadline. | |

| | | |
|---|---|--|
| Stop accepting RSVPs | One to two weeks prior to forum. | You'll need time to create name badges and registration lists. |
| Regularly communicate and coordinate with the speakers and participants: <ul style="list-style-type: none"> • Send forum reminder to all registered participants. • Hold teleconference with speakers and panelists to discuss forum goals and prepare for their session. | <ul style="list-style-type: none"> • As needed throughout planning process. • One week prior to forum. • Three to four weeks prior to forum. | Sending regular reminders help keep the forum fresh in everyone's minds and makes the planning process go smoother. |
| Book all necessary forum components if not provided by the venue: <ul style="list-style-type: none"> • AV • Tables/Chairs • Coat rack, if necessary | One month prior to forum. | |
| Forum Room Setup: <ul style="list-style-type: none"> • Work with the venue contact to decide the best setup for the room. • For these forums crescent rounds typically work best. • Ask for two 6' rectangular tables with two chairs to be set up outside the forum room, one for registration and one for any materials that may be handed out. | | You will need to have a good idea about the number of people you expect so you can get a room of the appropriate size. You may have to alter room setup to ensure that participants can be seated and are able to participate comfortably. |
| Handouts / Meeting Materials: Prepare handout packets, including: <ul style="list-style-type: none"> • Formal participants list. • Final agenda. • PowerPoint presentations. • Any other handouts that participants may find helpful (site fact sheets, case studies, etc.). | One week prior to meeting. | |
| Registration materials to ship or carry to the venue: <ul style="list-style-type: none"> • Name badges and table tents (if needed). • Blank name badges and table tents. • Name badge holders. • Tape (scotch and duct), scissors, stapler (extra staples), markers (Sharpie and flip chart), extra pens. • Pre-registered attendee check-in list (to check off those who pre-registered as they arrive). • Any handouts or materials created for the forum. • Sign-in sheet for those who did not pre-register. • Media sign-in sheet (if invited). | If shipping materials to the venue, aim to have the boxes arrive one to two days prior. Keep in mind holidays or winter weather may affect shipping times. | As participants arrive, ask them if they have pre-registered. If they have, ask for their last name and hand them their name badge. If they have no pre-registered, ask them to fill out the walk-in sign-in sheet and then have them fill out a name badge. Once the attendee is registered, give them a registration packet. |
| On-Site Logistics: <ul style="list-style-type: none"> • Arrive a day early. Plan a venue walkthrough for the day prior to ensure the room is setup properly and the AV setup is correct and working properly. | | Complete as much of the forum room/registration setup as you can the evening before to decrease the amount of work you have to do on the morning before the forum. |

| | | |
|--|---|---|
| <p>Follow-Up:</p> <ul style="list-style-type: none"> • Schedule a follow-up conference call with the Planning Committee to discuss the planning process, forum, and lessons learned. • Create an on-site participants list. • Send a follow-up email to participants (optional). | <ul style="list-style-type: none"> • One to two weeks following the forum. • One week following the forum. • Within two weeks of the forum (once all items are loaded onto the website). | <p>Invite Planning Committee. Take notes of forum highlights and action items. Use the list of checked-in participants and on-site registrants to create on-site participants list.</p> |
|--|---|---|

Appendices

This appendices section contains documents that will be useful during the planning process and on-site.

Briefing Sheet

The attached Briefing Sheet from Carlisle, PA is meant to be a bi-fold sheet, so the pictures of the brownfields on the left are on the back page, while the sheet on the right with the Carlisle borough logo is the first page. In the final design, these pages should be reversed.

Resource Roadmap

A Resource Roadmap template is provided that can serve as a useful guide to follow when creating a Roadmap to fit your project.

Logistics Sheet

The logistics sheet template provided below can be tailored to fit your needs. Customize the information in the brackets and highlighted in yellow to fit your meeting. If you do not anticipate many out of town participants, creating a logistics sheet may not be necessary.

Tips:

- You may need to add or delete some information depending on your specific needs. For instance, if no one will be flying to the forum, you can delete the “Airport Information” section.
- If you include information for people flying to the forum, be sure to include information for all area airports. Many cities are serviced by more than one. Note details of each airport, including which airport is the easiest to travel to and from, which may offer the least expensive flights, etc.
- Be sure to mention any special notes about the venue. For instance, if the meeting will be held in a newer building, it may not come up on GPS.
- You may need to add information about parking at the venue. (For example, many venues will offer discounted or complimentary parking for forum participants in their parking garage.) Items like this should be noted in the logistics sheet.
- Include walking directions if the hotel is walking distance to the venue.

Sign-In Sheets

You should have sign-in sheets for media and for “walk-in” participants who did not pre-register. You can print out the templates provided and use them on-site at your forum.

On-Site Registration:

The on-site sign-in sheet is for participants who did not pre-register. Print out several copies of this sign-in sheet to ensure you have enough room for all walk-ins. Keep this list with the other registration check-in list so that you have a complete record of all walk-in participants in order to have an accurate record of participants for the on-site participants list after the forum.

Media Sign-In:

When there is a media presence at a forum, you should have a list of people who attended from each media organization. If you do not anticipate a media presence, it is not necessary to print out that sign-in sheet.

Site Photos



INTERNATIONAL AUTOMOTIVE COMPONENTS GROUP (IAC)
Fire - 2012



INTERNATIONAL AUTOMOTIVE COMPONENTS GROUP (IAC)
Closed - 2008



TYCO ELECTRONICS
Closed - 2009



CARLISLE TIRE & WHEEL
Closed - 2010

Project Team

CARLISLE BOROUGH COUNCIL
Perry Heath, President
Linda Ceconello
Dawn Flower
Matthew Madden
Sean Shultz

CARLISLE BOROUGH COUNCIL
Donald Grell, Vice President
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THE CARLISLE CONNECTIVITY PROJECT

Transportation Investment Generating Economic Recovery Request

Request

Carlisle seeks \$12,000,000 in TIGER Construction Grant funding, with a 40% non-federal match of \$8,000,000, plus major public and private leveraging, to transform a Distressed Brownfield Area into a Sustainable Jobs Center. Carlisle also seeks a \$3,000,000 DCED Multimodal Transportation Fund grant for construction, right-of-way acquisition, environmental assessment, surveys, construction bid documentation, and other construction costs for this important project.

Carlisle Borough



The historic Borough of Carlisle in central Pennsylvania (population 18,600) is striving to revitalize a key section of the community after devastating manufacturing job losses in a distressed neighborhood. Partnered with Cumberland County, North Middleton Township, the Commonwealth of Pennsylvania (PennDOT and PA's Department of Environmental Protection), U.S. EPA and other allies.

Project

The Carlisle Connectivity project will re-engineer a network of critical State roads and community streets in an area that recently lost three large factories and hundreds of jobs, leaving vacant brownfields in the midst of a distressed neighborhood that lies between the historic downtown, the world-famous Carlisle Car Events Center, Dickinson College, the Army War College, assisted senior housing, and key transportation facilities. The Carlisle project will fix two dangerous and failing intersections, reconnect traditional grid streets as walkable complete corridors to new jobs and civic hubs, and deploy green infrastructure to manage stormwater in this Chesapeake Bay watershed. The result of this sustainable transportation investment will be a mix of up to 433,000 sq. ft. of new commercial development and 365,000 sq. ft. of new homes, producing 3,000+ permanent jobs, \$125 million in private investment, and \$49 million in tax increment over 20 years.

Building on the foundation of strong and inclusive community planning supported by an EPA Brownfields Area-Wide Grant plus resources from Pennsylvania, the local community and the private sector, TIGER6 Planning and PennDOT Multimodal funding can help take preliminary engineering designs to complete, shovel-ready plans on these key project components highlighted on the inside project map.

Project Map

A The proposed roundabout at College and B Street as part of the B Street Extension to reconnect the new development into the existing neighborhood.

B B Street Extension and "complete street" improvements between the brownfield redevelopment sites to reconnect neighborhoods and new development. This extension will be between College Street and PA34/Carlisle Springs Road.

C The proposed mini-roundabout and multi-use trail at B Street and Fairground Avenue.

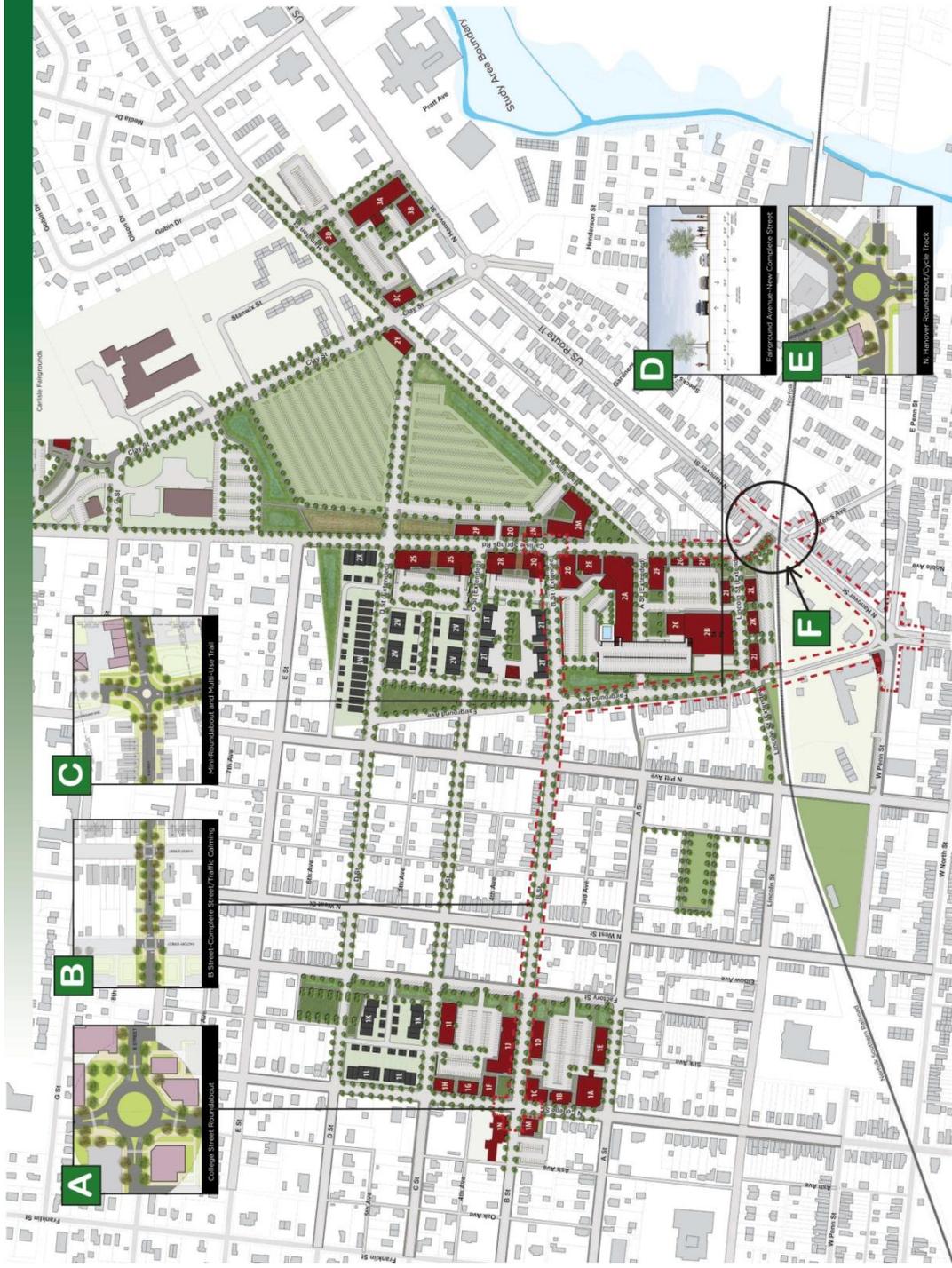
D Improvement of Fairgrounds Avenue from Penn Street to B Street as a two-way "complete street."

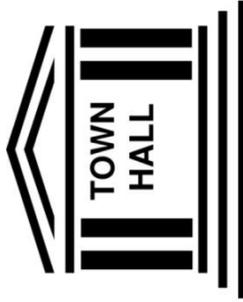
E The proposed roundabout on North Hanover Street (PA 11) to realign the currently failing intersections at Fairground Avenue, Penn Street, and N. Hanover Street to ensure the main commercial corridor into the historic district functions with improved capacity and safety to handle the demand of existing and new redevelopment.

F Realignment of the intersection at N. Hanover Street (PA 11) and PA 34/Carlisle Springs Road to improve vehicle & pedestrian safety, and traffic flow.

STORM WATER MANAGEMENT

Raingardens, bioswales, tree planting, public spaces & other green infrastructure will be integrated into these transportation facilities to manage stormwater.





CITY OF XYZVILLE

2016 AGENDA FOR SUSTAINABLE COMMUNITY REVITALIZATION

The City of XYZville, XY is a community of xy,xyz people that seeks to revitalize closed factories and blighted sections of downtown with new revitalization. XYZville’s municipal development authority has acquired the vacant factory complex and its 27 acres on the riverfront on the south end of the central business district along Main Street, a site that has been vacant, polluted and blighted for more than 25 years. Using U.S. EPA Brownfields Assessment grant funding for reuse planning, the community has created a vision for a vibrant, mixed use riverfront development that includes a local healthy foods market, commercial offices to serve the growing downtown, mixed-income housing to replace the 99 affordable units at the severely deteriorated public housing complex, and small retail shops for citizens and tourists. XYZville seeks to upgrade Main Street along the new development area into a complete street to improve walkability and connect the project to the central downtown, and to establish new riverfront public park, recreational, and trail facilities along this beautiful natural area. To put this vision into action, XYZville seeks support and resources from local investors, state and federal agencies, philanthropic foundations, and the private sector, including the following:

Template for a Resource Roadmap

| Project & Key Components | Estimated Costs | Funding & Support Needed | Match & Leveraging | Key Next Steps |
|---|--|--|---|--|
| <p>Demolition of obsolete factory buildings and structures</p> | <ul style="list-style-type: none"> ✓ \$400,000 asbestos abatement ✓ \$200,000 cleanup of petroleum spill area ✓ \$600,000 buildings demolition ✓ \$6-8 million for restoration and reuse of historic brick mill building | <ul style="list-style-type: none"> ✓ \$1 million EPA Brownfields Cleanup Revolving Loan Fund for asbestos and petroleum cleanup ✓ HUD CDBG and Section 108 Loans for site prep and demolition, and mill restoration ✓ Federal Home Loan Bank, Community Investment Program funding for mill restoration | <ul style="list-style-type: none"> ✓ XYZville Tax Increment Finance proceeds ✓ State of XY Brownfields Cleanup Fund grants or loans ✓ Private developer contribution | <ul style="list-style-type: none"> ✓ Confirm available level of TIF proceeds ✓ Complete brownfields assessment and remedial planning using remaining EPA Assessment funding ✓ Meet with EPA Regional Brownfields Office to discuss RLF opportunities. Deadline for RLF application December 2016 ✓ Meet with state HUD office to discuss Section 108 loan ✓ Find member bank in XYZville willing to use FHLB Community Investment Program |

| | | | | |
|--|---|--|--|---|
| | | ✓ Historic Tax Restoration Credits (25% of restoration costs) | ✓ Work with XY State Historic Preservation Office to establish plan to use historic tax credits on mill restoration | ✓ |
| Stormwater management with green infrastructure | \$2 million | <ul style="list-style-type: none"> ✓ Clean Water SRF Green Reserve loans, coupled with principle forgiveness ✓ HUD Section 108 proceeds ✓ Economic Development Administration, Public Works Grant | <ul style="list-style-type: none"> ✓ XYZVille Stormwater Fee proceeds ✓ Work with State of XY State DEP Office of Water to enter stormwater project on State Clean Water Intended Use Plan ✓ Apply for summer 2016 Green Reserve grant | ✓ |
| Mixed-Use Development Center Construction | \$75-90 million | <ul style="list-style-type: none"> ✓ USDA Business & Industry Guaranteed Loan ✓ National Development Council public-private partnership bonding tool ✓ HUD Section 108 loan proceeds ✓ New Market Tax Credit | <ul style="list-style-type: none"> ✓ Meet with USDA Rural Development office located in State XY ✓ Contact regional representative for National Development Council ✓ Contact community development entity with allocation of New Market Tax Credits, and explore potential NMTC expert to retain as counsel | ✓ |
| Complete Street Improvement on Main Street | \$850,000 for design, engineering, permitting and construction management \$7 million for construction | <ul style="list-style-type: none"> ✓ State XY & MPO for Transportation Alternatives Program grant for design and engineering ✓ CMAQ grant for design and engineering ✓ Rural TIGER grant for construction | <ul style="list-style-type: none"> ✓ State XY Surface Transportation Priority grant as match to TIGER for construction ✓ Work with MPO to secure placement of Main Street project as priority in Transportation Improvement Plan ✓ Meet with State DOT district engineering office to build support ✓ Collaborate with state elected representatives and Office of the Governor to build support ✓ Invite XYZ's congressional delegation to site visit to review design plans | ✓ |
| Healthy Foods Market | \$550,000 for establishment of local food cooperative as anchor tenant of healthy foods market | <ul style="list-style-type: none"> ✓ EPA Local Foods, Local Places technical assistance award to support planning to tie foods market to broader community revitalization ✓ \$200,000 USDA Community Foods grant | <ul style="list-style-type: none"> ✓ \$75,000 Kresge Foundation Local Foods Grants ✓ \$200,000 match from City of XYZ ✓ Meet with USDA in state field office ✓ Invite Community Foundation, Funders Network, and Kresge supporters to be part of Local Foods, Local Places charrette | ✓ |

| | | | | |
|------------------------------------|---|---|--|--|
| | | <ul style="list-style-type: none"> ✓ \$75,000 USDA Farmers Market Promotion Program grant ✓ \$50,000 grant from XYZ Community Foundation, matched with \$50,000 Partners for Places grant from The Funders Network for Smart Growth & Livable Communities, for creation of sustainability plan for market | | |
| Affordable Housing Center | <p>\$28 million for affordable housing component of overall \$75 million project with mixed-income housing at mixed-use development</p> | <ul style="list-style-type: none"> ✓ \$2 million HUD Choice Neighborhoods Planning & Action Grant ✓ HUD Choice Neighborhoods \$25 million implementation grant ✓ Low Income Housing Tax Credit allocation from State of XY housing agency | <ul style="list-style-type: none"> ✓ Private sector developer equity and debt | <ul style="list-style-type: none"> ✓ Build local coalition to pursue HUD Choice Neighborhood support ✓ Issue Request for Statements of Interest for private sector development partner |
| Riverfront Park & Trail | <p>\$2-3 million in river shoreline restoration \$6 million park and recreational upgrade \$1 million pedestrian/bike train</p> | <ul style="list-style-type: none"> ✓ Corps of Engineers Section 22 Planning, Assistance to States, and Section 206 Ecosystem Restoration grants for planning & construction of shoreline restoration and portions of recreational improvements ✓ Land and Water Conservation Fund grants, via State XY parks agency ✓ NPS, Outdoor Legacy Recreation Grant ✓ USDA Community Facilities grants and loans | <ul style="list-style-type: none"> ✓ Local TIF proceeds ✓ County parks impact fee proceeds | <ul style="list-style-type: none"> ✓ Convene with Corps District Office of Planning & Programs ✓ Work with congressional delegation to build Corps support at District and Division levels, and in Corps Work Plan & budgeting process ✓ Work with County to confirm level of available impact fee proceeds for grant matches |

Logistics Sheet for [forum name]
[Forum Location]
[Forum Date]

Forum Information:

The [Forum Name] will be held at:

[Forum Venue Name]

[Street Address]

[Website URL, if available]

If you require special needs or accommodations while attending the forum, please contact [Forum name, phone number, and email].

Registration Information:

To register for the forum, please visit the following link: [registration link]. The deadline to register is [registration cut-off date].

If you have any issues with registration, please contact [forum contact] at [contact email] or [contact phone number].

****OR****

To register for the forum, please send an email with the subject: "[Forum Name] Registration" to [forum contact] by [registration deadline].

Hotel Information:

A hotel block has been reserved at the [Hotel Name] located at:

[Hotel Address]

[Phone Number]

[Website URL]

Rooms are being held at [room rate] (plus [tax percentage] tax) for the nights of [room block dates]. **YOU MUST RESERVE BY [cut off time] on [cut off date]** to receive this special rate. After [cut off date] you may not be able to reserve a room at the group rate. To reserve a room call [hotel phone number]. To receive the group rate you must mention that you are with the [Room Block Name]. You must cancel your hotel room [insert cancelation policy here].

The hotel is located about [distance] from the venue and [add any special hotel information/special offers (complimentary breakfast, parking, etc.) here]. For more information on the [hotel name], please visit their website: [website URL].

Driving Directions from the [hotel] to the venue:

[Insert directions here. A Google map is often the easiest way to get directions and gives you the ability to link to a map with step-by-step directions. If in doubt, send this sheet to your contact at the venue or the hotel to confirm that these are the best directions.]

Airport Information:

From [Airport] to the [Hotel].

[Insert directions here]. For additional airport information, please visit: [airport URL]

From [Airport] to the [Forum Venue]:

[Insert directions here]. For additional airport information, please visit: [airport URL]

Optional Event:

There will be a [description of optional event (dinner, tour, etc.)] on [date of event]. [Include all necessary information including times of event, any related costs, dress code, transportation information to and from event, and how to RSVP for the event.].

