



# Patrick T. Field

Managing Director

Consensus Building Institute, Inc.

Associate Director | MIT-Harvard Public Disputes Program

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## PROFESSIONAL SUMMARY

Over twenty-five years' experience as a public issues mediator, facilitator, trainer and researcher in the U.S., Canada, and internationally.

## KEY ACCOMPLISHMENTS

- Nationally recognized mediator, facilitator and trainer who has helped thousands of diverse stakeholders address energy, natural resource, and environmental challenges.
- Expertise in energy, agriculture and food systems, water quality, Superfund cleanup, tribal and First Nation engagement, and transportation and land use.

## EXPERIENCE

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| 1994-present | <b>Consensus Building Institute</b><br><i>Senior Mediator, previously Managing Director, Senior Associate</i><br>Facilitated and mediated thousands of public meetings, workshops, multi-stakeholder and agency negotiations, and technical meetings. Experienced in natural resource, energy, agricultural and nutrition, environmental, and land use issues. Conducted over thirty conflict assessments and taught negotiation, mediation, and consensus building skills to hundreds of federal, state, and local agencies, Tribes and First Nations, environmental advocates, and private companies. As co-leader of CBI from 2004 to 2020, grew revenues by four times, and increased staff from 10 to 30. | Cambridge, MA |
| 1994-2020    | <b>MIT-Harvard Public Disputes Program, Program on Negotiation, Harvard Law School</b><br><i>Associate Director</i>  | Cambridge, MA |
| 1994-1996    | <i>Research Associate</i><br>Initiate and direct research projects on application of dispute resolution/consensus building principles and strategies to public policy arenas. Develop strategies and materials for teaching negotiation and dispute resolution skills.   |               |
| 1989-1992    | <b>Division of Capital Planning &amp; Operations, Commonwealth of MA</b><br><i>Energy Project Planner</i><br>Generated \$2 million in capital improvements and \$470,000 in annual energy savings through a shared energy savings program at a state university and college. Obtained \$1.4 million in utility incentives resulting in an annual energy savings of \$260,000.  | Boston, MA    |

## EDUCATION

1992-1994	Massachusetts Institute of Technology <i>Master of City Planning</i> Concentration in environmental policy.	Cambridge, MA
1982-1986	Carleton College <i>Bachelor of Art</i> Graduated Summa cum Laude, Phi Beta Kappa	Northfield, MN

## MEMBERSHIPS/PROFESSIONAL AFFILIATIONS

Association of Conflict Resolution, Public and Training Sectors, Washington, D.C.  
Member

U.S. Institute for Environmental Conflict Resolution  
Mediator, Roster of Conflict Resolution Professionals

U.S. Environmental Protection Agency  
Mediator, ADR Roster

U.S. Department of Interior  
Mediator, ADR Roster

University of Montana Center for Natural Resources and Environmental Policy  
Senior Fellow

## SELECTED PROJECTS

### AGRICULTURE, NUTRITION AND FOOD SYSTEMS

**Vermont Agency of Agriculture, Food and Markets Working Group on Soil Health and Payment for Ecosystem Services, 2019-2022.** Facilitating a Working Group of diverse stakeholders wrestling with how to develop a payment for ecosystem services program to reduce flooding, increase soil health, reduce nutrient loading, store carbon, and sustain wildlife habitat while accelerating transformational change in Vermont's agriculture sector.

**National Campaign for Sustainable Agriculture, 2019, 2021 & 2022.** Facilitated NSAC's forty-member policy council to develop key priorities for advancing climate change action, soil health, conservation program funding, local meat packing support, health food and nutrition, beginning and socially disadvantaged farmers programs, and other objectives.

**U.S. Farmers and Ranchers Alliance Honor the Harvest, 2021-22.** Co-design and co-facilitate a 150 person on-line event to bring agriculture and food system leaders from across the value chain to explore how to accelerate

transformative investment, data and technology, and collaboration across GHG and sustainability commitments.

**Farm Bill Conservation Coalition Dialogue, 2017 and 2022.** Facilitated a group of diverse, bi-partisan conservation, farm, and environmental and groups to develop a consensus statement on new directions for conservation programs in the 2018 and 2023 reauthorization of the US Farm Bill.

**Long-Term Agriculture Research (LTAR) Network, 2021-22.** Co-facilitated the strategic planning for a network of agricultural research stations across the country seeking to accelerate the intensification of sustainable practices through shared data, joint learning, and dissemination and application of research to farms and ranches.

**Global Roundtable on Sustainable Beef, 2020-21.** Co-facilitated a multi-lingual dialogue for the GRSB to develop goals for climate change, land use and animal welfare. Process included three work groups, common report, full group feedback from across numerous country representatives, and final adoption by the GRSB membership.

**Chesapeake Bay Funders Network Capacity Building Assessment, 2020-21.** Evaluated opportunities for advancing the clean water objectives in state and county Watershed Implementation Plans in Lancaster County, Pennsylvania, and the Shenandoah Valley in Virginia. Conducted numerous interviews, reviewed extensive background documents, and developing specific funding opportunities around technical service provision, fundraising strategy, and integration of water quality with trails, local foods, and rural water issues.

**Vermont Agency of Agriculture, Food and Markets Division of Food Safety and Consumer Protection, 2019-2020.** Facilitated the development of a strategic plan for six sections ranging from dairy, meat, maple, produce and poultry inspection to animal health and weights and measures. Assisted the Division in articulating a clear mission, values, division-wide and section goals.

**Vermont Water Quality Partnership Strategic Plan, 2018-19.** Facilitated a process of key state and federal agencies and non-profits to build out a clear, comprehensive strategic plan for an inter-organizational partnership to maximize efficiency and capabilities of diverse water quality programs across Vermont

**Land Stewardship for Fortune 100 Company, 2018.** Helped design, convene, and facilitate a land stewardship workshop for a Fortune 100 company to help design a private-sector nutrients program to ensure better nutrient management and soil health on 2 million acres of US farmland.

**New York Harmful Algal Blooms Technical Summits, 2018.** Facilitated five summits of experts and stakeholders across New York State to provide input into the Governor's 2018 signature environmental addressing nutrient inputs into 12 of the state's iconic water bodies contributing to increased harmful algal blooms affecting drinking water and recreation alike.

**Vermont Agency of Agriculture, Food and Markets Water Quality Program Strategic Plan, 2017.** Facilitated the development of a strategic and implementation plan for the Water Quality Program tasked with providing technical support, grants, and regulatory oversight on nutrient management and best management practices for water quality protection across the state of Vermont.

**Farm Bill Conservation Coalition Dialogue, 2017.** Facilitated a group of diverse, bi-partisan conservation, farm, and environmental and groups to develop a consensus statement on new directions for conservation programs in the 2018 reauthorization of the US Farm Bill.

**Advancing Healthier Eating among U.S. Brands, Philadelphia, PA, 2017.** Designed and facilitated a workshop with 30 marketing, merchandising, and executive leaders from a major international grocery retailer aimed to build momentum toward leading in its regional U.S. markets on healthier eating.

**Pursuing a Unified Message on Agricultural Research Workshop, Washington, D.C., 2016-17.** Facilitator for a Riley Foundation funded workshop among a set of leaders from natural resource and environmental non-governmental organizations (NGOs), natural resource societies, and universities to explore and create a unifying message with the perspective of the natural resource and environmental quality. Designed workshop, facilitated, and prepared final report.

**Vermont Agricultural Subsurface Tile Drainage Working Group, Vermont, 2016.** Convened and facilitated a Vermont Agricultural Subsurface Tile Drainage Advisory Group (TDAG). This group brought together a diverse group of stakeholders including farmers, agronomists, environmental advocacy organizations, and federal and state agencies to develop a report on the science and policy options regarding subsurface tile drainage past and current use and impacts on water quality.

**Massachusetts Farming and Public Health, Massachusetts, 2016.** Facilitator for an assessment, convening, and agreement on recommendations to improve the coordination, regulation, and understanding between local public health officials and local agricultural development on farms and in farmers markets and local processing.

**Global Roundtable on Sustainable Beef Strategic Planning, 2015-16.** Led a strategic planning process for the Global Roundtable on Sustainable Beef. Conducted interviews with Board members from the U.S., Canada, Latin America, and Europe. Designed and led a Board strategic planning retreat and prepared the draft strategic plan

**Merged Model for Nutrition Incentives Program, 2014-16.** Lead facilitator and process evaluator to help two national and leading nutrition incentive non-profits undertake a merged model pilot in Oklahoma and Georgia. Goals were to advance and expand nutrition programs that combine Supplemental Nutritional Assistance Program benefits with financial incentives to purchase locally grown fruits and vegetables.

**Project on Wellness and Nutrition, Washington, D.C., 2011-15.** Lead facilitator in partnership with Convergence Policy group. Conducted a 100-person assessment, convened forty leaders across industry, advocacy, and academia for a multi-year project to shape consumer demand for healthier eating through non-government action, exploring a range of cultural, financial, structural, and marketing levers of influence. PNW results include a Smart Receipts program, a Healthy Retail Scorecard, and Phase II funding to advance retail actions and convenience store innovations.

**Global Roundtable on Sustainable Beef Global to Local, San Antonio, TX and Sao Paulo, Brazil, 2015.** Lead facilitator of a CBI team that assisted the members and Board of the Global Roundtable to explore how to take global principles and criteria and connect them to emerging roundtables in diverse countries. Did background research on other sustainability programs and standards, conducted numerous interviews with stakeholders, designed an initial workshop conducted bi-lingually with the Brazilian roundtable, refined the draft approached, facilitated a second design meeting, and prepared a final report for the Board.

**Farm to Institution New England (FINE), various locations, 2011-14.** Lead facilitator helping a network of some thirty New England groups formalize and expand a network structure and decision-making for the burgeoning farm to institution movement in New England.

**Self-Regulation and Marketing to Children and In-Store Retail Marketing, New York, New York, 2013 and 2016.** Helped design and facilitate two, one-day roundtables of 50 diverse participants each on marketing of

healthier foods to children and in-store grocery retail marketing for healthier eating, sponsored by the Children's Food and Beverage Marketing Initiative, the Partnership for Healthier America, and the Interfaith Center on Corporate Responsibility.

**Partnership for a Healthier America (PHA), Healthy Campus Initiative, Washington, D.C., 2013.** Lead facilitator for designing and conducting a one-day intensive workshop to gather ideas from campus food service directors and recreation specialists to help PHA create a program of commitments for campuses across the U.S. to improve health through nutrition and fitness.

**Conservation Coalition Dialogue, 2013.** Facilitated a group of diverse, bi-partisan conservation and taxpayer groups to refine their policy asks based on the 2012 Senate and House Committee mark-ups of the US Farm Bill.

**Chesapeake Bay Foodshed Initiative, 2012-13.** Co-facilitator helping a network of mid-Atlantic groups initiate food systems planning for the production areas supplying greater Washington, D.C. and Baltimore, MD.

**National Sustainable Agriculture Summit, Washington, D.C., January 2011.** Lead facilitator for two-day National Sustainable Agriculture Coalition (NSAC) Farm Bill Summit that brought together 100 farmers, conservation, rural development, public health and other organizations to strategize around improving the next Farm Bill. Assisted meeting conveners with defining the scope of the summit, developing detailed process plans for each of the discussion topics, and facilitating twelve breakout sessions.

**New England Farm and Food Security Initiative, Boston, MA and Concord, NH, 2011.** Helped design and facilitated two, one-day workshops with New England agricultural commissioners, funders, numerous stakeholders, and the Undersecretary of USDA to advance key local to regional agricultural initiatives. WWF Sustainable Beef Conference, Denver, CO, 2010. Senior advisor to a team of facilitators supporting a 250-person global conference on increasing the sustainability of beef production worldwide. Assisted with a steering committee, conference planning, management of 7-person facilitation team, and facilitation of the plenary and breakout sessions.

**Chesapeake Bay Funders Network Agricultural Initiative, 2009-10.** Evaluator of a three-year multi-foundation process for increasing voluntary efforts by agricultural means in the Chesapeake Bay Watershed to reduce nutrient inputs into the Bay.

**U.S. Department of Agriculture Annual Partners Meeting, Office of Civil Rights, Washington, DC, 2005-09.** Facilitated the planning and annual meeting of over two hundred individuals from organizations dedicated to the advancement of diverse, underserved farmers and ranchers from across the U.S with numerous USDA offices and staff. The three-day meetings culminate in a policy briefing to the Secretary of Agriculture. Massachusetts Food and Farm System Efforts, 2008-09. Facilitated the planning efforts of various groups across Massachusetts regarding developing food and farm system networks and alliances from policy advocacy to regional infrastructure and financing.

**Food and Farm Policy Project, 2005-08.** Facilitator and evaluator of a diverse alliance of sustainable agricultural, community food systems, anti-hunger, nutrition, and environmental groups seeking to develop a shared platform for federal farm policy. Consulted closely with the project's coordinator, facilitated steering committee and other meetings, and assisted with differences among key partners. Alliance achieved 28 of its 30 priorities in the 2008 Farm Bill.

**Diversity Initiative Policy Project, 2006-08.** Facilitator of a diverse coalition of socially disadvantaged producer advocates (Native Americans, Black farmers, Latino and Asian farmers) seeking to develop a shared platform

for federal farm policy. Consulted closely with the project's coordinator, facilitated leadership team and other meetings, and assisted with differences among key partners. Coalition achieved unprecedented gains for minority producers in the 2008 Farm Bill.

**Merger Dialogue, Sustainable Agriculture Coalition and the National Campaign for Sustainable Agriculture, 2008.** Facilitated the exploration and detailing of a merger between two national agricultural organizations. The organizations officially merged in early 2009.

**New York City Food Systems Network, 2006.** Facilitated strategic planning session for numerous groups seeking to formalize and energize diverse City groups working on local food systems, public health, and nutrition.

**Sustainable Agriculture and Food Systems Funders, 2006.** Facilitated a strategic planning effort to further formalize and focus a network of funders engaged in advancing food security, food systems, socially disadvantaged producers and consumers, and sustainable agriculture.

**National Campaign for Sustainable Agriculture, 2005-06.** Facilitated a six-month dialogue, including a three-day, intensive retreat, to build agreement surrounding commodity policy reform among twenty-six different sustainable agricultural organizations, resulting in major report and detailed process evaluation. Concluded with an evaluation of the project for Oxfam America.

**FDA Forum on Obesity and Away from Home Foods, Washington, DC, 2004-06.** Co-mediator with the Keystone Center for a national policy dialogue among restaurants, institutional service providers, consumer groups, researchers, and governments regarding nutrition, the away from home foods sector, and helping consumers to manage weight gain and obesity. Final report released by the dialogue and FDA in spring 2006.

**Kellogg Food and Society Policy Cluster, Minneapolis, MN, 2004-05.** Designed and facilitated two-day intensive forum for 20 organizations in the final proposal stage for a \$5 million grant program for agricultural, conservation, and food security and nutrition policy development. Worked with Kellogg to help organizations refine proposals, reach agreements on joint budgets, and for final recipient organizations, to design a protocol on coordination and decision-making for the multi-organization joint policy analysis and advocacy.

## CLIMATE CHANGE, RESILIENCE AND AIR QUALITY

**Vermont Climate Action Plan, 2021-22.** Facilitator of Vermont Climate Council's working groups around agricultural and ecosystems and rural resilience to develop and advance key pathways, strategies, and actions to enable Vermont to meet its legislative mandated Global Warming Solutions Action goals. Follow on work includes facilitating a task group on the role and implications on forest for biomass for electricity and thermal heat.

**New York State Climate Assessment Plan, 2021-22.** Co-facilitator of an assessment to identify key stakeholders to engage in work groups and sector advisory groups for eight sectors to collaboratively create a new climate assessment plan for 19.5 million New Yorkers. Follow-up work includes facilitating Sector Advisors for Agriculture and Water Resources

**Barr Foundation Climate Program Review, Boston, MA, 2015.** Lead facilitator to assist the Foundation review its first five years of \$50 million funding, create and engage a high level advisory board, conduct research on

climate funding globally, hone and refine goals, objectives, assumptions, and indicators. Trustees approved the five-year plan in December 2015.

**Resilient Vermont, Vermont, 2013.** Lead facilitator working with the Institute for Sustainable Communities through three workshops to develop state-wide recommendations with local to state-wide stakeholders across sectors for a more resilient Vermont after the initial recovery from Tropical Storm Irene.

**New England National Estuarine Reserve Climate Adaptation Project, New England, 2012-15.** Principal investigator with M.I.T. for a two-year research project investigating the role of game simulations in instigating community conversations around adaptation planning for four New England local coastal communities. The result was publication of a book capture our learning over the project.

**Global Solutions Warming Act Project, Boston, MA, 2010-11.** Lead facilitator for a statewide effort to identify, develop, and enact the next generation of policies that would address greenhouse gas emissions in the Commonwealth of Massachusetts. Funded by the Barr Foundation, work included an extensive statewide assessment on organizations working on the issues, convening of a multi-sectoral leadership team, development of four focus areas for legislative and administrative action, a 100-person statewide leadership designed to hone recommendations and engage broader constituencies.

**Cambridge Climate Change Congress, Cambridge, MA, 2009-10.** Facilitated a three session Climate Change Emergency Congress of 100 citizens developing recommendations to City Government and the civic community for accelerating actions to reduce carbon emissions in the city.

**Adapting to Risks posed by Climate Change, Cambridge, MA, 2009-10.** Co-developer and instructor of an ongoing course on local and regional adaptation planning for climate change sponsored by the Lincoln Institute of Land Policy.

**Coast Smart Planning in Maryland, Annapolis, MD, 2008-09.** Co-developer of a one-day, intensive course and outreach effort across Maryland to profile an adaptation planning approach for coastal communities threatened by climate change and its multiple impacts.

**Greater Boston Breathes Better (GB3), 2004-08.** Facilitated 20-member Working Group and assisted in project development of a region-wide, voluntary program to reduce air toxics from transportation sources. Activities included engaging cities, towns, and universities in off-road construction retrofits, implementing no idling efforts around public schools, and working with local hospitals to reduce associated transportation-related emissions. Project obtained funding from the Boston Foundation, U.S. EPA, and the City of Boston. GB3 received a national Clean Air Excellence Award from EPA in 2009.

**EPA Community Leadership Campaign for Air Toxics, Portland, OR, San Diego, CA, Lawrence, MA, Lowell, MA, St. Louis, MO, Denver, CO, 2005-08.** Created, in partnership with EPA, a new national program to assist communities and programs across the United States to implement air toxics reduction campaigns through leadership training, facilitation, coaching, and the creation of a learning network of community leaders across the country.

**EPA Air Toxics National Pilot Project, Cleveland, OH, 2001-03.** Co-facilitator convened and facilitated twenty-five person working group of agency and community members on national pilot effort as part of EPA's Urban Air Toxics Strategy. Diverse group reached consensus on selecting numerous risk reduction activities for mobile, stationary, and indoor air toxics in the City of Cleveland.

**Older Persons and Indoor Air Pollutants Roundtable, Washington, DC, 2003.** Convened and facilitated a one-day workshop for US EPA to bring together national organizations advocating for older persons and technical and programmatic experts in indoor air pollutants.

**Northern Oxford County Coalition, Rumford, ME, 1995-97.** Co-facilitated 25-person two-year community coalition of local citizens, health care providers, businesspersons, and state, local, and federal government representatives investigating air quality and related public health issues in four towns in rural Maine. Conducted a forty-eight interview Stakeholder Analysis. Facilitated monthly full-coalition and subcommittee meetings. Assisted group in increasing membership, developing a mission statement, ground rules, and work plan, identifying technical advisors, undertaking a cancer data request, and exploring and understanding ongoing air monitoring efforts.

**Arctic Climate Change Impact Assessment and Inuit Leaders Briefing, Iqaluit, NU, 2004.** Facilitated a meeting of 30 Inuit leaders, government representatives, and scientists discussing the draft findings of the international scientific team's climate impact assessment and its implications for Inuit's traditional way of life.

## ENERGY & EXTRACTIVES -- OFFSHORE WIND

**BOEM Wind Energy Task Forces and Related Matters, Various locations, 2012-22.** Facilitate a series of federally established state task forces from Maine to South Carolina convened to create a platform for federal, state, local and tribal coordination on offshore wind opportunities in the United States. The Task Forces provide input on the federal process for identifying, leasing and developing offshore renewable energy opportunities from the Carolinas to Maine. Conducted a review of Task Force performance and developed recommendations to BOEM for improvement. Also facilitated public workshops on various stages of the wind development process, including auction initiation, environmental assessments, coastal impacts in the Carolinas, and others. Facilitated meetings, prepared for all logistics, and developed meeting summaries.

**Responsible Offshore Science Alliance, 2019-22, Providence, RI, Philadelphia, PA.** Working with offshore wind developers and commercial fishermen, facilitated the creation of the Responsible Offshore Science Alliance, from initial brainstorming to extensive state and federal engagement to organizational design and funding. Upon hiring of the Executive Director, assisting in organizational development and creation and facilitation of a 40-person Advisory Council. Currently, co-design and facilitate quarterly meetings of the Advisory Council.

**BOEM Marine Mammal Acoustics and Avian Species Telemetry Workshops, 2020-22.** Working with BOEM, NOAA, and FWS helped design and facilitate several on-line workshops with federal and state agencies, NGOs, academics, and wind developers to explore means for creating a regional passive acoustic monitoring network off the east coast of the US, coordinate and manage data coming from disparate research projects, and addressing data for numerous studies using telemetry to track and understand avian marine species.

**Regional Wildlife Science Entity, 2019-21, Boston, MA and New York, NY.** Working in partnership with Cadmus, facilitated multi-sector workshops, conducted numerous interviews, prepared case studies, and developed an extensive vision document outlining the future structure of a regional science entity to address offshore wind impacts and wildlife. Assisted a Steering Committee of four sectors to secure funding, procure a fiscal and administrative agent, and aid the agent in standing up the entity.

**BOEM Synthesis of the Science on Offshore Wind and Fisheries, 2020.** Facilitator working with interagency and industry planning team to create, hone, facilitate and summarize a Synthesis of the Science workshop involving over three days, 500 unique participants, 15 panels, 25 breakout groups and 12 time zones. The workshop



covered fisheries and offshore wind impacts from ecological to oceanographic to taxa to socioeconomics and fisheries management.

**NY Bight Passive Acoustic Monitoring (PAM) Data Synthesis Workshop, 2020.** Facilitated a workshop among various scientists and state and federal agencies undertaking passive acoustic monitoring for marine mammals to better coordinate efforts and identify opportunities for data sharing, alignment of parameters, explication of methods, and future regional monitoring opportunities

**Development of a Scientific Research Framework to Understand the Effects of Offshore Wind Energy Development on Birds and Bats in the Eastern United States, New York, 2020.** Helped design and facilitated stakeholder workshop with scientists, NGOs, regulators, and offshore wind developers inform the development of a scientific research framework to guide the long-term study of potential effects to birds and bats from offshore wind energy development in the eastern United States.

**Project Wind Array Design, 2020.** Facilitated conversations between individual project teams and potentially affected fishermen regarding array design options for specific projects.

**Joint Task Force of Offshore Wind and Commercial Fisheries, 2019-20. Providence, RI and Philadelphia, PA.** Facilitator of quarterly meetings and webinars of a joint industry task force tackling issues of common concern from joint learning about their respective industries, communication channels to navigation aids to issues such as the Jones Act, cabling, geophysical and geotechnical surveys.

**Transit Workshops, New England and New York. 2018-2020.** Through several workshops, surveys, and confidential conversations, facilitated two separate efforts among offshore wind developers, commercial fishermen, the US Coast Guard, and others in identifying potential transit lanes in the New England and NY Bight wind energy areas. The New England effort results in a focused Port Access Study by the Coast Guard and for New York, a final detailed report with possible routes, principles and considerations.

**NYSERDA Fisheries Technical Working Group, New York, 2018-20.** Facilitator of the F-TWG, including meeting design and facilitation of F-TWG meetings, workshops on commercial fishing transit through wind energy areas, and development of a regional science entity around off-shore wind and wildlife impacts.

**A Research Framework for Off-Shore Wind Impacts to Marine Mammals, New Bedford, MA, 2018.** Helped design and facilitated a stakeholder workshop and prepared proceedings to inform the development of a scientific research framework for marine mammals and sea turtles.

**BOEM Fishermen-Wind Energy Developer Workshops, various locations along the East Coast, 2012-14.** Lead facilitator of a series of workshops to engage fishermen and wind energy developers in creating Best Management Practices for developers of wind energy areas in federal waters from South Carolina to Maine.

## ENERGY & EXTRACTIVES -- WIND LANDSIDE

**Wind and Wildlife Mitigation Technology Acceptance Workshop, 2022.** Working with The Renewable Energy Wildlife Institute and the National Renewable Energy Laboratory co-designed and facilitated a series of on-line workshops identifying the barriers to and opportunities for technology mitigating the effects of wind on bird and bats from early bench scale to full adoption.

**Vermillion County Wind Energy Exploration, 2021-22.** Working with Keystone Center for Environmental Policy, assisting Apex, a wind energy developer, in initiating an unprecedented and collaborative process to explore the possibility of wind energy project in a western Indiana county for the co-benefit of landowners, the county's fiscal health, and the wind company.

**Department of Energy State of Science and Technology for Minimizing Impacts to Bats from Wind Energy, Denver, CO, 2019.** Worked closely with an internal DOE Renewable Energy labs team to design an agenda, identify presenters and panelists, facilitate a two day workshop and prepare proceedings for some 100 participants across sectors identifying the state of the science for reducing impacts on bats due to wind energy projects.

**American Wind Energy Association, Washington, D.C.. 2019.** Designed and facilitated industry deliberations on arriving at a common approach to sound and light modeling, monitoring and standards.

**Bats and Wind Energy Cooperative, Austin, TX and Denver, CO. 2012, 2015, 2018.** Facilitated two, week-long workshops of the "committee of the whole" participants across government, industry, academia, and non-profits. These research-agenda setting workshops of the Bats and Wind Energy Cooperative (BWEC), discussed emerging issues, operation impact minimization, determined approaches and feasibility for modeling bat populations and mortality factors, and establish research priorities for the Cooperative.

**Bat Population Monitoring and Modeling Workshops, Ft. Collins, CO, Knoxville, TN, 2012-13.** Facilitated four, week-long workshops to bring together bat researchers, population modelers, and experts in the field of wildlife population monitoring to design a statistically robust and logistically feasible national monitoring plan for bat populations in North America in response to current threats of disease and development. The culmination of the process is a U.S. Forest Service General Technical Report outlining the overall approach and methods to a national program.

**Wind and Noise Technical Advisory Group, Boston, MA 2013-14.** Co-lead facilitator of a technical work group convened by the Department of Environmental Protection, involving municipalities, academics, and acoustic consultants. Its purpose is to consider and prioritize best practices for the monitoring, modeling, permitting, and compliance determination of noise for wind energy facilities in Massachusetts.

**Landscape Values and Wind Siting, Michigan, North Dakota, Massachusetts, 2011-12.** Co-investigator on an NSF-funded project to analyze the connection between wind siting and landscape values. Research team designed protocols, workshop format, and is lead facilitator of 25-person intensive workshops engaging citizens in visual modeling, choice making, and other factors.

**U.S. FWS Wind Wildlife Guidelines, Washington, D.C. 2011.** Co-facilitator of the reconvening of a federal advisory committee to align Committee's recommendations on U.S. wind and wildlife guidelines with the USFWS's draft final guidelines given significant differences between the multi-stakeholder committee and the USFWS.

**DOE Collaborative Wind Siting, Cambridge, MA, 2010-11.** Co-developer and trainer of a 100-person attended three-day collaborative wind siting course funded by the Department of Energy (DOE), addressing siting challenges from noise to visual impacts to community benefits.

**Maine Wind Power Siting Forum, 2007.** Conducted brief assessment and facilitated meeting of diverse stakeholders to finalize methodologies report for guiding wind developers in preparing for permits and consider process for balancing wind energy development, need, and associated impacts.

**Little Mt. Equinox Wind Forum, Manchester, VT, 2005-06.** In partnership with the Orton Foundation and the Town and Village of Manchester, Vermont, designed and implemented a four-month process to bring the best available information to the public regarding a proposed wind turbine project. Facilitated coordinating group, prioritization meeting, and final community summit with 90 participants using advanced keypad polling technology.

## ENERGY & EXTRACTIVES -- ELECTRIC, EFFICIENCY, FOSSIL FUELS

**Pipeline Construction, Safety, and Siting, various locations, 2019-2022.** Designed and facilitated several processes related to pipeline safety and community engagement, including a process to develop advice on mitigation conflict around pipeline construction with ERM and the Southern Gas Association, stakeholder needs and interests with the Pipeline Safety Trust as convenor of a multi-sector roundtable, and currently facilitating the American Petroleum Institute (API) RP1185 process for public engagement with a multi-stakeholder Task Team.

**Law Enforcement Coordination and Pipeline Construction in South Dakota, 2018.** On behalf the Governor's office, explored with tribes across South Dakota the need, challenges, and possibilities of increased law enforcement coordination during the planned construction of the Keystone XL pipeline.

**Exploring the Cumulative Impacts of Unconventional Oil and Gas, Pittsburgh, 2017.** Designed and facilitated a two-day multi-stakeholder workshop exploring how to assess cumulative impacts of energy development of the Marcellus shale, sponsored by the American Geophysical Union.

**Minnesota Environmental Impact Review of Enbridge Line 3 Oil Pipeline, Minnesota, 2017.** Designed and facilitated 15 public meeting across the state involving some 1,500 participants, five tribes, and three state agencies, on the review of the state's first full environmental impact statement of an oil pipeline replacement, abandonment, and relocation proposed project. Issues included tribal rights and impacts, potential risks to the headwaters of the Mississippi, comparison to alternative forms of transportation, and greenhouse gas emissions.

**U.S. Extractives Industry Transparency Initiative, Washington, DC, 2012-17.** Lead mediator of an assessment and convening effort to implement the EITI process in the U.S regarding gas, oil and mineral payments to the federal government. Involved a 60-interview stakeholder assessment, numerous public listening sessions, and completion of a final assessment as of July 2012. Facilitated and supported the creation and operations of the Multi-Stakeholder (MSG) Group Federal Advisory Committee to reach agreement on the unanimously supported US application to the International EITI Secretariat for candidacy in 2013 and early 2014. In 2015 the MSG refined and honed the first ever US EITI on-line and written report, making available extensive interactive data sets, maps, and contextual information on the US revenues from extractives, releasing the final in December 2015.

**Ethical Corporation Extractives Sustainability Summit, Houston, TX, 2015.** Co-facilitated a two-day workshop with industry leaders in sustainability in mining, gas and oil to explore a host of issues regarding social performance.

**MISO Stakeholder Redesign Process, U.S. Midwest, 2015.** Co-facilitator of an assessment and dialogue process to improve the efficiency and effectiveness of complex members' organization governance process. MISO is a 200-member regional transmission organization in the mid-West. With Raab Associates, we conducted

numerous interviews, member polling, and worked with a steering committee to conduct four workshops to hone recommendations for process improvements.

**Massachusetts Energy Efficiency Advisory Council Evaluation, 2014.** Co-assessor reviewing the first six years of the multi-stakeholder advisory body to set and achieve ambitious targets for Massachusetts' nationally recognized energy efficiency programs, including commercial, residential, and low-income efforts. Scoped goals for evaluation, conducted interviews, developed final report for consideration by the EEAC, including recommendations for a stakeholder engagement for the 2015-18 next plan.

**Massachusetts Carbon Tax Study, 2014.** Facilitator for a stakeholder group spanning the major state sectors that would be affected by the adoption of a carbon tax in the Commonwealth. The study team and stakeholder group explored scenarios regarding a revenue neutral tax on funds generated, level of the carbon tax, allocative effects, and a range of options for returning the revenues to households as well as businesses.

**Local Land Use Responses to Unconventional Shale Development, June 2014.** Designed, organized and led a two-day intensive workshop as part of a larger research project on local land use responses to unconventional shale development. Workshop involved communities in three states utilizing a range of tools and responses to oil and gas development in their communities. Co-sponsors included the Rocky Mountain Land Institute, the Union of Concerned Scientists, and the Center of the American West.

**Osage Gas and Oil Operations Environmental Handbook, Pawhuska, Oklahoma, 2014.** Lead mediator of a tribal-federal-stakeholder engagement process to update a 1997 manual that provides guidance to gas and oil operators on the Osage mineral estate on meeting applicable environmental laws and regulations.

**New Hampshire Energy Site Evaluation Committee Review, New Hampshire, 2013.** Co-lead facilitator of an extensive process to solicit stakeholder and citizen input on the structure and process of New Hampshire's energy siting body. Process included extensive research across Northeastern states, creation of an ad hoc multi-sectoral coordinating committee, conducting of seven focus groups, and five public workshops involving over 300 citizens using keypad polling. Report was submitted to the NH Legislature in December 2013.

**Osage Gas and Oil Negotiated Rulemaking, Pawhuska, Oklahoma, 2012-13.** Lead mediator of a tribal-federal advisory committee tasked to revise and improve the regulations guiding the development of the Osage headright holders minerals estate. Issues include rent, royalties, accounting, monitoring, and enforcement. The Committee reached concurrence of the tribal and federal government caucuses on a recommended set of regulations under an expedited timeframe after eight Committee meetings and extensive public comment.

**Consumer Advocates of PJM, 2012-13.** Facilitated 13 states and D.C Advocate offices to develop rationales for representative organization at the PJM members' process. Helped new organization develop staffing, budget, and early strategy and hire first Director.

**PJM Governance Assessment and Facilitation, U.S. Mid-Atlantic Region, 2009-2012.** Co-facilitator of an assessment and dialogue process to improve the efficiency and fairness of a complex members' organization governance process. PJM is a 700-member regional transmission organization in the mid-Atlantic, the largest such organization in the U.S. Interviewed seventy-five companies and regulators, conducted a fifty-question online survey with over 100 respondents, and prepared a detailed report for the Members Committee and PJM leadership. Follow-on included co-facilitation of a detailed review and improvement of the members' governance process ranging from committee structure to operational procedures for proposal and decision-making. Process concluded in Membership acceptance of a new Stakeholder Process Operating Manual and its implementation, including coaching, training, and peer learning for key staff.

**PJM Training and Coaching, 2010-2012.** Managed and oversaw negotiation and consensus building training for facilitators at PJM, the largest regional transmission organization in the U.S. Co-led monthly meetings with PJM facilitators to discuss challenges, reoccurring problems, and best practices. Co-leader of the same team that conducted an extensive organizational audit on its governance challenges and opportunities, conducted a yearlong facilitation to create a new members' process and stakeholder manual, and mediated final issues relating to voting and decision-making.

**U.S. EPA Technical Workshops for Hydraulic Fracturing Study, Washington, D.C., 2011-12.** Facilitator for four, two-day intensive technical workshops involving agencies, academia, industry, and NGOs regarding a Congressionally mandated study on the risks and impacts of hydraulic fracturing on water resources. Topics included well chemical and analytical methods, well construction operations, fate and transport, and water resource management. Also facilitated public hearings on new EPA guidelines for diesel reinjection.

**Future of Vermont Energy Policy, 2007.** Co-facilitator of a statewide citizen engagement process to explore options for the future electric energy supply for Vermont. Process included reaching out to over 600 Vermonters via an expert advisory committee, a deliberative polling process, and five public workshops.

**Biomass Energy Resource Center, VT, 2006.** Facilitated the planning and implementation of a two-day strategic planning session for a small, nationally focused non-profit committed to developing biomass energy in schools, universities, and other institutions.

**Federal Energy Regulatory Commission Hydroelectric Relicensing, Fresno, Sacramento, Oroville, and Davis, CA, Washington, DC, Chattanooga, TN, 2000-04.** Co-designed and taught seven mutual gains negotiation courses for stakeholders involved in hydroelectric relicensing consensus building efforts and a three-day mediation skills training for FERC staff.

**Tampa Electric Transmission Siting, Tampa, FL, 2003.** Planned and co-facilitated two intensive public workshops for over 200 people affected by the siting of a new transmission line in residential neighborhoods in greater Tampa.

**Canadian Energy Pipeline Association, the Canadian Association of Petroleum Producers, and the Indian Taxation Advisory Board, Cambridge, MA, Calgary, AB, Edmonton, AB, Halifax, NS, and Fredericton, NB, 1999-03.** Designed and co-taught a week-long mediation course, a four-day building agreements course, a two-day negotiation course, and a two-day consensus building course to First Nations, provincial and federal officials, the Canadian Indian Taxation Advisory Board, the Canadian Energy Pipeline Association, and the Canadian Association of Petroleum Producers.

**Florida Municipal Power Agency, Orlando, FL, 2004.** Co-designed and taught one day workshop for Agency leadership and managers on mutual gains approaches to dealing with an angry public.

**Western New York Relicensing Consensus Committee, Lockport, NY, 2000.** Co-facilitated a three-day strategy session with unions, businesses, and municipalities regarding the Niagara Power Project Federal Energy Regulatory Commission Relicensing.

**Northeast Energy Efficiency Partnerships, Northborough, MA, 1998-02.** Co-taught a one-day facilitation course, a one-day advanced facilitation skills course and conducted working group observations for NEEP project managers, who facilitate regional electric utility working groups on coordinating and developing joint energy efficiency programs.

**Massachusetts Division of Energy Resources Issues Assessment, 1998.** A report to the Division of Energy Resources on developing the Division's oversight and coordination role and statewide energy efficiency goals (with Jonathan Raab).

**Gulf of Maine Council Natural Gas Pipeline Forum, Boston, MA, 1997.** Facilitated half-day forum on environmental issues and impacts pertaining to construction of two proposed Canadian-U.S. natural gas pipelines.

**Energy Technology Centers Consolidation and Integration, Pittsburgh, PA, Morgantown, WV, Bartlesville, OK, and Washington, DC, 1995-96.** Conducted three separate conflict assessments and coordinated the project team who assisted three Department of Energy Technology Centers and Headquarters Office of Fossil Energy to consolidate and integrate management and administration of over 600 federal employees and a budget in excess of \$1 billion over a seven-month period under D.O.E.'s Strategic Alignment Initiative. Led four-person interview team in carrying-out 120 interviews for three separate Conflict Assessments. Facilitated numerous meetings of high-level managers on the consolidation/integration teams. Assisted in facilitation of two, sixty-person Brainstorming Retreats.

#### NATURAL RESOURCES MANAGEMENT AND FEDERAL LANDS

**Florida Wildlife Corridor, Orlando, FL, 2022.** Co-facilitator working with the Archbold Experimental Station to design and facilitate three science exchanges around the developing data, science, and mapping of the wildlife corridor regarding water resources, climate change, and land use, culminating in a final workshop in frontiers of science at the Corridor's annual summit.

**National Park Service Cultural Resources, Partnership and Science Directorate, 2021.** Co-facilitator of a strategic planning effort to help the 130-person directorate to establish longer-term goals, address chronic understaffing issues, and confront climate change, diversity, changing technology regarding the cultural resources of the U.S.

**Olmsted, Longfellow and JFK Birthplace Historic National Parks, Brookline and Cambridge, MA., 2019-21.** Facilitated internal NPS process to build a strategic plan for these three historic parks under one management to address historic renovations, innovative programming, external partnerships, and the advanced use of on-line tools for archives, programming, and communication.

**Ungulates and Highways, Salt Lake City, Utah, 2019.** Designed, facilitated, and prepared proceedings for a three-day, 80-person workshop to bring together diverse agencies and actors who all have stake in wildlife and highways to share and learn from one another; to catalyze learning and connections across states, state agencies, and others; and to identify best practices and key points of leverage for action.

**Forest Pest and Packaging, Hubbard Brook Experimental Forest, NH, 2018-19.** Designed and facilitated a twenty-five (25) participant roundtable dialogue to explore possible options for addressing the problem of imported invasive forest pests and the pallet industry in ways that minimize negative impact on the forest-based economy in New England. Roundtable participants included landowners, foresters, pallet manufacturers, conservation practitioners, researchers, and staff of state and federal agencies.

**Northeastern States Research Cooperative, Portsmouth, N.H., 2018.** Designed and facilitated an innovative visioning workshop among diverse stakeholders to generate a new, “2.0” vision for the sixteen-year research consortium focused on ecological and economic research on the Northern Forest.

**Salem Maritime and Saugus Historic National Park Strategic Plan, Salem, MA., 2017-19.** Facilitated internal NPS process to build a strategic plan for the historic parks resources, interpretation, operations, management, and public safety, including the replica 19th-century sailing ship the Friendship.

**DOI Sportsmen’s Access Summit, Washington, D.C., 2017.** Facilitated a one-day workshop of fifty individuals representing a wide range of conservation, hunting, angling, and shooting sports organizations to provide individual views on how the Department could support and advance access to public lands for hunting, angling, and shooting sports.

**DOI Office of Aviation Safety and Interior Business Center, Washington, D.C., 2017.** Assessed procedures, relationships, and conflicts among two divisions of DOI responsible for procuring and ensuring the safety of all DOI aviation services.

**DOI Office of Policy and Budget, Washington, D.C., 2016.** Designed and taught a three-part series in collaboration and negotiation for DOI’s lead budget and policy office.

**DOI Office of Wildland Fire, Washington, DC, 2016.** Lead facilitator to assist the DOI’s four fire-fighting bureaus – NPS, BLM, BIA, and FWS – to reallocate the fuels and preparedness budgets differently across the four entities. CBI facilitated leadership meetings of Bureau Directors, the multi-Bureau Interior Fire Executive Council, helping to evaluate and improve a complex risk-based fire management model and associated dollar allocations across hundreds of millions of dollars and managed acres. The process, involving mediation within and among the bureaus, resulting in options and alternatives for the Secretary.

**New England Landscape Scenario Planning, New England States, 2014-16.** Facilitator in partnership with the Harvard Forest to conduct a multi-year research project with numerous academic institutions and partners to develop and refine methods to create future scenarios for the New England landscape and then model effects on the landscape to inform and shape policy at the local, state, and federal level.

**Habitat Conservation Plan for Massachusetts Piping Plover, Massachusetts, 2014-16.** Facilitator of a multi-party advisory group to develop a Habitat Conservation Plan for providing managed relief to plover management on municipal and non-profit managed beaches along the coast, working closely with the MA Natural Heritage Program and the Fish and Wildlife Service.

**White Nose Syndrome Disease Management and Treatment Workshop, Grand Rapids, MI, 2015.** Lead facilitator to design and facilitate a 60-person workshop of state, federal, academic, and non-profit scientists across the country to advance a national research agenda for the disease and treatment of white nose syndrome, a fungal disease wrecking havoc on numerous bat species across the eastern U.S.

**Bat Population Monitoring and Modeling Workshops, Ft. Collins, CO, Knoxville, TN, 2012-13.** Facilitated four, week-long workshops to bring together bat researchers, population modelers, and experts in the field of wildlife population monitoring to design a statistically robust and logistically feasible national monitoring plan for bat populations in North America in response to current threats of disease and development. The culmination of the process is a U.S. Forest Service General Technical Report outlining the overall approach and methods to a national program.

**Joint Fact Finding for Large-Scale Landscape Conservation, Salt Lake, Utah, 2013.** Developed and trained on joint fact finding for large landscape scale agencies, NGOs, and interested citizens.

**Partnership for America's Great Outdoors, 2012.** Co-facilitator of a group of leading outdoor business, foundations, and alliances to develop the framework for a partnership to advance urban populations engagement with the outdoors.

**Fresh Pond Shared Use Plan, Cambridge, MA, 2010-11.** Lead facilitator of a 9-month process to create a first ever shared use plan for recreational use of an urban, intensively used reservation and city water supply. Process included extensive outreach, public information materials, large public meetings, a twenty-person core plan development group, and developing and submittal of a final shared use plan to the city.

**Department of Interior Open Government, Washington, D.C., 2011.** Planned for and facilitated an interagency two-day workshop on expanding and advancing the open government initiative across the Department's bureaus. Included seeding conversation with innovations across the federal government, developing work groups and teams, and creating a structure for action and accountability.

**Cape Cod National Seashore Dune Shack Historic District, Provincetown, MA, 2009-10.** Co-facilitator of a process to develop a stakeholder-supported use and preservation plan for a historic district within the national seashore, involving arts and culture, historic use, and public access. Group's consensus Shared Use Plan was accepted by the Seashore's Advisory Commission.

**New Model for National Forest in Massachusetts, Central and Western Massachusetts, 2009.** Co-facilitator of a process to gather input via numerous, diverse focus groups on the possibility of creating a unique kind of forest unit in the north central part of the state. A final report was issued in September 2009.

**Cape Hatteras National Seashore Off-Road Driving, Cape Hatteras, NC, 2005-09.** Mediator in conducting an extensive conflict assessment for highly controversial issues related to endangered species, recreational fishing, pedestrian access, and off-road driving. Produced a thorough conflict analysis, conducted the convening of a 30-person Federal Advisory Committee Act negotiation, and co-mediated the process.

**Regional Approaches to Western Lands, U.S. Rocky Mountain Region, 2007-08.** In partnership with the Sonoran Institute and the University of Montana, conducted brief assessments of land use opportunities and conflicts in the region, trained staff in regional collaboration, and assisted various projects and groups through facilitation and strategic planning.

**Bureau of Land Management, Phoenix, AZ, Bozeman, MT, Boise, ID, Albuquerque, NM, Gunnison, CO, Alexandria, VA, 2004-07.** With the University of Montana Public Policy Research Institute, developed materials for advanced collaborative problem-solving courses, prepared handbook on dispute resolution and collaborative problem-solving and booklet on the Federal Advisory Committee Act (FACA), taught various state office and field managers in advanced skills related to collaboration, planning, NEPA, and other processes.

**Ft. Stewart Army Base Land Use Forum Pilot, Ft. Stewart, GA, 2006.** In conjunction with the Conservation Fund and National Association of Counties, planned and conducted a two-day pilot for the Secretary of Defense on regional planning, community engagement, and base encroachment.

**Engaging People in the BLM Western Oregon Plan Revision, Medford, OR, with Resolve, Inc., and the University of Montana, 2005.** A survey of stakeholders to develop a menu of community involvement activities for the revision of six resource management plans and an overall EIS for 2.5 million acres.



**Monomoy National Wildlife Refuge Comprehensive Conservation Plan, 2005.** Completed a re-scoping assessment from 15 interviews and led a team of six facilitators to design and facilitate two public workshops on re-scoping issues related to FWS's planning and EA effort. Issues included public access, vendor contracting and selection, predator control, and shell fishing within the refuge.

**Supplemental EIS Agency Scoping for Introduction of F/A-18 (Super Hornet) Aircraft, 2005.** Facilitated a one-day review of the Supplement Environmental Impact Statement (EIS) for the U.S. Navy and its state and federal agency stakeholders. Issues included waterfowl disturbance, national security, and noise modeling.

**Steens Mountain Advisory Council, Bend, OR, 2005.** Conducted an evaluation and facilitated a retreat for an innovative, Federal Advisory Committee established to advise BLM on the legislatively created special management area in eastern Oregon.

**Department of Interior Collaborative Framework Workshop and Website, 2004-05.** Co-facilitated an Interior-wide event of ADR and community involvement specialists in order to broaden the understanding of collaborative processes available to DOI and to create a framework for categorizing the Department's numerous processes and programs. Then worked closely with the Collaborative Action and Dispute Resolution (CADR) office to complete a report and develop numerous web-based materials.

**U.S. Forest Service, 2004.** Facilitated two-day event for the U.S. Forest Service and a state's natural resources program to explore, refine, and obtain consensus on a proposal for a new national forest unit.

**Fire Island National Seashore Off-Road Driving Regulatory Negotiation, Ocean Beach, NY, 2000-03.** Conduct a conflict assessment and as co-mediator convened and facilitated twenty-five-person committee to develop new off-road driving regulations for the U.S.'s most densely populated National Seashore. Worked with diverse communities, local governments, advocacy groups, and National Park to revise twenty-year old regulations for a National Seashore with no roads. Group reached consensus on most but not all areas of regulation in August 2003.

## LAND USE, TRANSPORTATION, CONSTRUCTION, AND COMMUNITY DEVELOPMENT

**Massachusetts Roundtable on Transportation Financing, Boston, 2019-20.** Funded by the Barr Foundation and working closely with the Massachusetts Taxpayers Association, facilitated a group of high-level leaders to advance a shared approach to transportation funding and reform.

**Lower Mystic Regional Transportation Planning Process, Somerville, Boston, and Everett, MA, 2016-18.** Lead facilitator a multi-agency and City process to develop, model, and prioritize actions for multi-modal transportation improvements in and around one of the more vexing transportation planning problems in Greater Boston. Process includes integrating land use and transportation modeling and future scenarios, extensive public engagement, and robust mobility modeling.

**Department of Transportation Tribal Self-Governance Negotiated Rulemaking, Sterling, VA, 2018.** Helped facilitate and support a week-long culminating event to build agreement among US tribes and the US Department of Transportation and its divisions for self-governance of grant programs.

**Boston Planning and Development Agency, Boston, MA 2016.** Lead trainer and workshop designer for training all of BPDA's planning and development staff in advanced facilitation.

**MassMoves, Massachusetts, 2016-17.** Lead facilitator and team lead for a state-wide effort, working with the Massachusetts State Senate, to engage citizens across the Commonwealth in 9 public workshops to envision the future of mobility in the Commonwealth. Process includes extensive coordination with state senators, metropolitan planning entities, regional transportation authorities, an interactive website, and professionally surveying in partnership with Mass, Inc.

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

**Site Planning for Communities with Closing Coal-Fired Coal Plants, Somerset and Holyoke, MA 2015.** Working with a team of economic, design, and environmental experts, led the engagement process for two communities seeking to identify conceptual planning options for the reuse of two sites, until recently, long-term, coal fired generating plants with significant contributions to the towns' tax bases.

**Plan Eastern Tennessee and One STL, Knoxville, Tennessee and St. Louis, MO, 2014-15.** Worked with core partners on the regional sustainability initiative as HUD-grant funding came to an end to help build long-term collaboration. Work included scoping issues and challenges, working with leadership teams, conducting an extensive process assessment through interviews, developing, and facilitating a region-wide collaboration summit, and producing final reports and recommendations.

**Colorado Department of Transportation (CDOT) Energy Smart Collaboration, Denver, CO, 2011-2012.** Facilitator and core consulting team member for an interagency collaborative among metropolitan planning organizations, transportation districts, CDOT, the Governor's energy office, and air quality agencies on incorporating energy considerations into numerous aspects of transportation planning, maintenance, and operations.

**The Cobell Settlement and Land Fractionation, U.S.-wide, 2011-2012.** Co-facilitator working with the Bureau of Indian Affairs and Department of Interior on planning and conducting six consultations around the U.S. with tribes, tribal organizations, and landowners regarding how to implement the \$1.9 billion settlement to consolidate lands for tribal use and economic development.

**Funding for Repair, Renovation, and New Construction of Indian Schools, U.S.-wide, 2007-11.** Lead facilitator in an assessment and negotiated rulemaking process. Team conducted interviews with over 198 individuals, representing some 99 different schools. Issues included financing, programming, design, and construction management regarding repair of 180 Native American schools across the U.S. Supported convening of a twenty-five person Federal Advisory Committee. Co-facilitated, with Native American co-chairs, numerous Committee meetings and subcommittees to develop a catalogue of conditions, recommendations for improving the information management system, and new formulas for repair, renovation, and replacement funding.

**First Nations Tax Commission, 1999-2011.** Since 1999, CBI has worked closely with the First Nation Tax Commission, and its predecessor, the Indian Taxation Advisory Board, to build capacity in negotiation and conflict resolution. CBI has developed and provided numerous basic and advanced negotiation trainings, assisted with policy development, intervened in major disputes, provided policy development expertise, and offered ongoing coaching to senior staff. During this time, the organization has grown in complexity, and now offers support to over 100 different taxing jurisdictions.

**Toward a New U.S. Transportation Policy based on Performance, Washington, D.C. and Milan, Italy, 2010.**

Designed and facilitated an intensive workshop of U.S. transportation policy stakeholders with the Bipartisan 18

Policy Center, funded by the Rockefeller Foundation, on introducing performance metrics into U.S. transportation legislation and policy.

**Resolving Land Use Disputes, Cambridge, MA and other locations, 2005-09.** Co-taught a two-day introductory and three-day advanced course to planning professionals, developers, land use conflict stakeholders and mediators about techniques for working collaboratively and with neutrals to resolve land use conflicts.

**Future of I-81, Syracuse, NY, 2009.** Co-designed and managed a complex public input process related to the future of the I-81 interstate highway in Syracuse, New York. Co-managed the public input and stakeholder outreach process to diverse stakeholders in the Greater Syracuse community. Reviewed and translated technical reports to the public and facilitated information exchange between agency, local organizations, and the public.

**New Castle County Land Use and Permitting Process, New Castle County, DE, 2009.** Facilitator of an assessment and dialogue to improve the efficiency of land use permitting process in the state's largest county among New Castle County departments, and Delaware's Department of Transportation and Department of Natural Resources and Environmental Control.

**Massachusetts Health and Human Services Facilities Visioning, Boston, MA, 2008-09.** Developed and led a visioning process for consolidating 750 buildings with 11 million square feet on 5,400 acres to improve remaining facilities, save costs, and provide significantly increased services in the community for HHS clients.

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

**Division of Capital Asset Management, Boston, MA, 2008.** Facilitated a programming, design, and construction cross-office effort to identify interoffice challenges and solutions to ensure maximum organizational efficiency for new flows of bond funds for major capital improvements across the Commonwealth.

**McDonalds Real Estate, Raleigh, NC, 2008.** Co-taught tailored, intensive course in mutual gains negotiation for one hundred real estate and development professionals in the eastern service regions.

**AIANH150 Pilot Project, Durham, NH, 2007-08.** Facilitated a process seeking to create a master redevelopment plan for a 9-acre site in the heart of the University town. Worked with design professionals from across the state, townspeople, and the property owners to create a showcase process and outcome for smart growth redevelopment in New England.

**Augusta First in Medicine, Augusta, GA, 2007-08.** Facilitated the convening of a region-wide initiative among business and medical leaders to foster collaboration and promote the healthcare sector to improve care, increase health, and advance economic development.

**Land Trust Alliance and Trustees of Reservations, Austin, TX, Charlotte, NC, Harrisburg, PA, Baltimore, MD, Charlottesville, VA, Sacramento, CA, Chicago, IL, Cambridge, MA, and Leominster, MA, 2001-08.** Taught twelve one-day negotiation trainings for land trusts, conservation groups, planners, and others regarding land conservation negotiations, facilitation, and consensus building.

**Community Development Operations Evaluation, Falmouth, ME, 2007.** Through 30 stakeholder interviews, a web survey, a public workshop, and input from an ad hoc advisory committee, assessed the committees, boards,

and staff involved in all aspects of land use planning and decision making for the Town and offered 15 recommendations for improvement.

**Calgary Regional Partnership, Calgary, AB, 2006-07.** In partnership with the University of Montana Public Policy Research Institute, conducted an issues assessment on regional planning and the 19 engaged jurisdictions, and through facilitated dialogue, prepared a Terms of Agreement for the region to address planning, infrastructure, and growth.

**First Nation Tax Commission, Kamloops, BC and Ottawa, ON, 2006-07.** Provided ADRT policy advice and development for new Canadian-wide tax commission reviewing all First Nation tax by-laws and disputes.

**Somerville Center for the Arts, Somerville, MA, 2005.** Mediated an intensive, four-session process on negotiating special permit conditions for a proposed Arts Center with the project developer, arts community, abutters, and City officials in the City of Somerville, MA.

**MaxPak Site Development, Somerville, MA, 2004.** Coached the City of Somerville Planning staff and worked with a team of diverse design, permitting, transportation, and cost consultants on a public process to develop neighborhood design criteria for a controversial brownfields redevelopment.

**Meriden City Center Initiative Public Engagement Assessment, Meriden, CT, 2004.** A report to city residents and the project proponent on recommendations for intensive, effective public engagement in a downtown master planning initiative (with Stacie Smith).

**Barriers to and Opportunities for Mutual Gains Negotiation and Conflict Resolution in Land Use Decision-making on Martha's Vineyard Island, 2004.** A report to the Vineyard Commission and six towns on improving land use conflict prevention and resolution.

**Stop and Shop, Quincy, MA, 2003.** Co-designed and taught two, one-day courses in preparation and value creation in lease negotiations for the real estate division of Stop and Shop, Giant, and Buy Low grocery stores.

**The Future of Assembly Square, Somerville, MA, 2003.** A report to stakeholders with an interest in the long-term vision for the development of a 140-acre urban parcel adjacent to Boston, rail lines, and major highway infrastructure and the best means to achieve that vision in the short and medium term (with Merrick Hoben, Mieke Van der Wansem and Lawrence Susskind).

**New York Route 22 Transportation, Environmental, and Land Use Issues Assessment, 2003.** A report to the stakeholders of Putnum and Dutchess counties regarding the proposed expansion of a 3-mile expansion of Route 22 state highway and associated impacts to New York City's watershed, local communities, and the Great Swamp ecosystem (with Merrick Hoben and Sean Nolan).

**Chelsea Salt Dock, Chelsea, MA, 2002-03.** Completed a conflict assessment and mediated dispute among private company, a city, a neighborhood, and three state agencies to resolve a land use and environmental quality dispute with environmental justice concerns involving a parcel of privately held property used as a dock and bulk storage facility for road salt.

**Planning and Zoning Commissions Joint Planning Workshop, Simsbury, CT, 2002.** Designed and facilitated one-day dialogue between two commissions of a suburban town to initiate development of their new plan for conservation and development.

**First Nations and Non-Native Taxpayers Relations Workshops, Vancouver, BC, 2002.** Co-facilitated two, three-day workshops to consider common interests, divergent interests, potential representation models, and a draft policy document for non-Native taxpayers to influence residential property taxation decisions by First Nations while preserving First Nation autonomy and governance.

**General Services Administration, Washington, D.C. and Dallas, TX, 2000.** Co-developed and co-taught two, two-day negotiation courses and one, one-day course in negotiation for GSA managers and staff negotiating real property purchases and leases.

**Conomo Point Issues Assessment, 1999.** A report regarding the land disposition of Conomo Point to the Town of Essex, Massachusetts Board of Selectmen, Conomo Point Planning Committee, and the Fair Solutions Committee (with David Fairman and Tracy Dyke).

**Cape Ann Sustainable Communities Regional Town Meeting, Gloucester, MA, 1999.** Facilitated regional town meeting on drinking water protection for four North Shore communities and the Department of Environmental Protection's Source Water Assessment Program.

**Tribal and Town Government Dialogue, Aquinnah, MA, 1999.** Interviewed stakeholders and co-facilitated dialogue between the Wampanoag Gayhead Tribal government and administration and the Aquinnah Town government.

**New York City School Construction Authority, New York, NY, 1997.** Co-facilitated a two-day workshop on partnering principles for the Authority and the Board of Education's Division of School Facilities.

**Housing & Urban Development Roundtable, Washington, D.C., 1994.** Assisted facilitation of one-day roundtable on "Reducing Regulatory Barriers to Affordable Housing" involving 40 representatives of financing agencies, developers, affordable housing advocacy groups, and state and local governments across the U.S.

## COASTS, OCEANS AND FISHERIES

**Illex Stock Assessment and Process Evaluation, 2021-22.** Facilitated an interdisciplinary Work Group of scientists on a research track assessment (RTA) for the Northeast Fisheries Science Center on Illex, a commercially harvested species with a complex life cycle. Upon completion of the Work Group, undertook a process review of the effort to identify potential improvements to the RTAs.

**Delaware Coastal Zone Conversion Permit Regulatory Advisory Group, Delaware, 2017-19.** Lead assessor, convenor, and facilitator of a regulatory advisory committee (RAC) to develop, by consensus to the greatest degree possible, the conceptual regulatory framework and approach to the Coastal Zone Conversion Act. Facilitating with the RAC Chair, former head of the Delaware Supreme Court, using extensive public engagement as well as technical work groups, the group reached consensus on its recommendations in Spring 2019.

**Scallop Limited Access Permit Review, Atlantic City, NJ; Hampton, VA; and New Bedford, MA., 2018.** Co-facilitator of a series of workshops to identify the strengths and weaknesses of the current scallop permitting system among scallopers. Process resulted in a summary report to the New England Fisheries Council, including key principles to guide any revisions to the current system and a range of alternatives and their strengths and weaknesses.

**Indicator Development for the Mid-Atlantic Regional Ocean System, Baltimore, MD, 2017.** Lead facilitator of a project team that engaged the Mid-Atlantic Regional Planning Body (RPB) members and its stakeholders in

the evaluation of potential indicator themes and data through assessment, focus groups, research, and a science workshop.

**Herring River Restoration, Wellfleet, MA, 2016-17.** Mediator among a major landowner and local, state, and federal agencies in reaching agreement around financing, phasing, and contingencies for restoring the Herring River through return of tides to thousands of acres of salt marsh on the Outer Cape.

**Northeast Regional Oceans Commission Stakeholder Engagement, New England, 2012-16.** Facilitated several activities related to oceans planning. Facilitated natural resource science workshop, public meetings on Regional Planning Body goals and objectives, focus groups of 20 to 40 aquaculture representatives regarding their views on regional ocean planning opportunities and concerns for the aquaculture industry, prepared reports on trends in maritime commerce and ocean energy, and a stakeholder forum on options for identifying important ecological areas and effective decision-making.

**Massachusetts Coastal Erosion Commission, Massachusetts, 2014.** Designed and facilitated a series of five (5) meetings to engage stakeholders along the coast on the status of coastal erosion, views of existing state and federal programs, and suggested reforms in regulations or programs.

**Chesapeake Bay Trust 2010-15 Strategic Plan, Annapolis, MD, 2009-10.** Facilitated the strategic planning process for Trust staff and Board to focus investment and action in education, outreach, and demonstration projects to advance the restoration of the Bay and build long-term stewards for the Bay and its watersheds.

**Division of Ecological Restoration Strategic Plan, Boston, MA. 2009-2010.** Facilitated the strategic planning process for two recently merged state agency divisions in charge of river and ecological restoration. Focus included developing new division's principles, visions, and specific actions to achieve its mission.

**Sustainable Shorelines, Hudson River Estuary, 2009-10.** Co-facilitator of a multi-year research project of a national estuary reserve program combining downscaled climate modeling and sea level estimates, shoreline technologies, and cost-benefit analysis, including ecological impacts of various choices over various climate change scenarios.

**Massachusetts Oceans Partnership and the Massachusetts Oceans Plan, 2008-09.** Co-facilitator of a planning and public engagement process for developing the Commonwealth's first ever oceans management plan. Provided process advice and facilitation to the consulting team, state planning team, and public workshops.

**Stellwagen Bank Marine Sanctuary Management Plan Fishermen's Caucus, 2004.** Facilitated two, one-day strategy meetings of commercial and recreational fishermen developing key strategies for the final management planning process. Issues included role of regulation, ecosystem research, historical resources, and ongoing Sanctuary management.

**Cooperative Sand Lance Initiative, Boston, MA, 2004.** Facilitated a 20-person research scoping and planning meeting for fishermen and scientists interested in developing collaborative, ecosystem research projects on a keystone species on Stellwagen Bank.

**Massachusetts Coastal Zone Management Division, Boston, MA, 1997.** Co-taught mutual gains negotiation and consensus-building skills daylong workshop for 30 project and program managers.

**The Prospects for Building Consensus on New Regulations Pursuant to Delaware's Coastal Zone Act, Dover, DE, 1996.** A Report to the Governor of Delaware and the Secretary of the Department of Natural Resources and Environmental Control (with Gregory Sobel, Willa Kuh, and James Gascoigne).

**Fisheries By-Catch Panel, Newport, RI, 1995.** Facilitated discussion of nine-member panel of fishermen, environmentalists, and regulators, and 100 audience participants to define the problem of by-catch in New England, identify barriers to overcoming the problem, and consider potential organizational and technical solutions.

## PUBLIC HEALTH

**Marine Fish Advisories for PCB, Boston, MA, 2008.** Facilitated a daylong event of sixty public health experts across the northeast regarding balancing the benefits of fish consumption against the risks of PCB ingestion and marine fish advisors.

**Eastern Equine Encephalitis Planning, Boston, MA, 2007.** Facilitated multi-stakeholder meeting regarding planning for response to a rare but fatal mosquito-borne disease, given concerns regarding pesticide spraying, human and animal health, and interagency coordination in the previous season.

**Danvers Explosion Response Action Review, Boston, MA, 2007.** Facilitated review of Department of Public Health and other agencies' response to a major chemical explosion in a residential neighborhood in Danvers, MA.

**Massachusetts DPH Biomonitoring Planning Facilitation, Plymouth, Northampton, and Boston, MA, 2003.** Co-facilitated three sessions with MA Department of Public Health and local health officials on proposed CDC-funded biomonitoring project and environmental health for the Commonwealth.

**PAVE PAWS Peer Review Panel, Sandwich, MA, 2000.** Facilitated presentation of findings by expert peer review panel to public on health risks associated with radar emissions.

**Oak Ridge Stakeholder Forum on Public Health, Oak Ridge, TN, 1999.** Facilitated a four-month process to establish a community forum for setting a public health agenda for the Oak Ridge Superfund site with the Agency for Toxic Substances Disease Registry, the National Institute of Occupational Safety and Health, and the National Center for Environmental Health.

**Community Assistance Panel, Massachusetts Military Reservation, Cape Cod, MA, 1998-99.** Conducted a team evaluation and facilitated transitional meetings of the Agency for Toxic Substances Disease Registry's Panel and co-wrote a process assessment of the Panel's work.

## SUPERFUND AND TOXIC CLEANUP

**Newtown Creek Superfund Cleanup, Brooklyn and Queens, NY, 2018-present.** Facilitator assisting a fifty-plus member group of diverse and divergent interests providing input to EPA on the cleanup of Newtown Creek from site investigation to anticipated Proposed Plans in the early 2020s. Facilitate and summarize meetings, coordinate with EPA technical team, engage with PRPs, state and city agencies, and maintain membership list and website.

**Housatonic River PCB Cleanup, Pittsfield, MA, 2009-present.** Mediator of dialogue among MA and CT states, various agencies, U.S. EPA, and General Electric in a two-stage process to develop a remedial approach to the 40-mile Rest of River. Issues include water quality standards, in-river modeling, river restoration and morphology, and linking wildlife, habitat, and cleanup standards, metrics, and goals. In addition, facilitator assisting a twenty-five-member group of diverse and divergent interests providing input to EPA on the implementation of the Consent Decree to remediate river sediment and soil sites in and along the Housatonic River from PCBs from the operations of General Electric manufacturing facilities.

**Mt. Zion Landfill Site, Pennsylvania, 2020-22.** Facilitator of a Office of Research and Development project to better integrate community involvement and ecosystem goods and services (EGS) into Superfund sites. Facilitate multi-division EPA teams, designed a process during COVID to help reveal community preferences for various EGS on the site, and prepared a lengthy case study written report.

**DOE Paducah Gaseous Diffusion Site, Kentucky, 2019.** Co-facilitator of an assessment, training, and facilitation effort to identify core challenges and improve working relationships for advancement of cleanup by the US DOE, US EPA, and the Commonwealth of Kentucky.

**Olin Chemical Superfund Site, Greater Boston, 2019.** Worked with the PRP and EPA team to clarify and explicate outstanding technical issues around modeling, site conceptual model, clean up levels and expectations as well as adjust and improve working relationships among the parties leading to the completion and release of a Proposed Plan.

**Hudson River PCB Cleanup, Ft. Edward, NY, 2004-2019.** Facilitator assisting a twenty-five-member group of diverse and divergent interests providing input to EPA on the implementation of the Record of Decision to dredge, dewater, and transport Hudson River sediments contaminated with PCBs from the operations of two General Electric manufacturing facilities.

**Office of Resource Damage and Restoration, Washington, D.C., 2015-16.** Co-facilitator of a process to engage tribes in how better to value the loss of cultural use due to natural resource damages under CERCLA or the Oil Pollution Act (OPA). Process includes confidential interviews, process design, and facilitating day-long workshops in Minnesota, New Mexico, and Washington.

**Velsicol Community Involvement Addendum Development, St. Louis, MI, 2015.** Facilitator and assessor engaging some thirty diverse stakeholders involved in the long-term clean up of the Velsicol Superfund site involving DDT and PBB and source of one of the worst environmental contamination and food supply cases in the U.S. Interviewed numerous stakeholders, coached EPA staff, and prepared a findings memo reflecting the host of concerns and possibilities for improved community engagement for the site.

**Massachusetts Military Reservation Superfund Clean Up, Cape Cod, MA, 1996-09.** Mediator and facilitator for decision-makers with the Department of Defense, the Environmental Protection Agency, Region 1, the Executive Office of Environmental Affairs, as well as for numerous local officials and citizens. Facilitated meetings of technical review teams, various citizens' teams, Selectmen from the affected towns, and the Remedial Program Manager's and Management team. Successfully mediated negotiated agreements on numerous separate preferred remedial actions, final remedial designs, and monitoring and sampling plans.

**Raymark Advisory Committee, Stratford, CT, 2000-08.** Convened and facilitated twenty-person committee advising the Town of Stratford, the CT DEP, and the EPA on an eight operable unit Superfund cleanup. Major issues include soil and groundwater contamination, risk assessment and health outcomes, and identification of remedial alternatives that minimize short and long-term disruption to the community. Group developed a



strategic plan, addressed issues of funding, prioritized work, and developed recommendations for a cost-effective, stage approach to cleanup with limited dollars.

**Massachusetts Military Reservation Impact Area Clean Up, Cape Cod, MA, 2006-07.** Facilitated periodic management meetings among the U.S. Army and its contractors, U.S. EPA, and MA DEP. Helped to identify key priorities, resolve disputes, address differences among technical teams on fate and transport models.

**Massachusetts Military Reservation Natural Resource Trustee Council, Cape Cod, MA, 1999-04.** Facilitator of the MMR Natural Resource Trustee Council, one of the first Councils established by the Department of Defense. Trustees include the Department of Interior, the U.S. Department of Veterans Affairs, the U.S. Department of Army, the U.S. Department of Air Force, and the Massachusetts Executive Office of Environmental Affairs.

**The Unanswered Questions, Mashpee, MA, 2000.** Facilitated daylong community-sponsored workshop on key issues facing cleanup of a military base on Upper Cape Cod.

**Georgia Environmental Protection Division and Union Camp, Savannah Complex, Atlanta and Savannah, GA, 1998.** Conducted an assessment and assisted the Georgia Environmental Protection Division and Union Camp Savannah Complex in a three session, four-day mutual gains dialogue on RCRA corrective action at the 500-acre Savannah mill complex.

**Coeur d'Alene River Basin Issues Assessment, 1999.** A report regarding environmental issues and concerns held by stakeholders in the Coeur d'Alene River Basin, Idaho, commissioned by the University of Idaho Water Resources Research Institute (with Mieke Van der Wansem, Jason Corburn, and Armand Ciccarelli).

## WATER QUALITY AND QUANTITY

**Passaic Valley Water Sewage Commission, 2022.** Designed and facilitated an on-line hearing of some 200+ people regarding environmental justice concerns and the proposal to install gas-fired generation, solar, and battery storage as backup power in the Ironbound community of Newark in case of a major storm event to keep the treatment plant operating for its 1.5 million customers.

**International Joint Commission Lake Ontario Public Advisory Group, 2020-2022.** Co-facilitator of a public advisory group (PAG) representing trans-boundary interests from Toronto to Montreal regarding the management of flows from the IJC-operated water system. The process has involved extensive technical discussion among the Great Lakes Adaptive Management Committee (GLAM), the PAG, IJC commissioners, the development of an innovative tool to show potential impacts to communities and constituencies across the system depending on management choices in the face of high uncertainty.

**Wolostoq Indigenous and Federal Watershed Collaboration, Maine and New Brunswick, 2016-present.** Facilitator for a process of the Maliseet First Nations and Tribe and Canadian and US federal agencies to develop a statement of cooperation, provide information sharing and learning and a strategic plan for collaborative action to restore salmon and ecosystems in the St. John River watersheds.

**Charles River River Designation Authority, Boston, MA 2020-21.** Facilitated a set of focus groups with institutional private property owners, private-sector property owners, and NGOs regarding the potential exercise of EPA Region 1's authority to address stormwater discharges to the Charles River under its rarely used residual designation authority.

**Assumable Waters EPA Work Group, Washington, D.C., 2018-19.** Facilitator of an EPA Office of Water working group, under the purview of the Assistant Administrator for Water, to revise regulations based on the Assumable Waters Subcommittee completed in 2017. Facilitate meetings with stakeholders, the Working Group, as well as track issues, options, and actions.

**Title VI North Carolina Disproportionate Impact Due to Concentrated Animal Feeding Operations, 2017-2018.** Mediator between NC DEQ and several environmental justice groups representing communities of color affected through air, water, and odor impact by some 2,000 confined feeding operations for swine. Mediated settlement was reached among parties through joint data collection, issue identification, option exploration of additional monitoring and permit conditions, and additional administrative commitments to meet Title VI requirements for participation, analysis, and inclusion.

**Assumable Waters Subcommittee, Washington, D.C., 2015-17.** Facilitator of an EPA Office of Water Subcommittee involving numerous states, EPA, tribes, and the U.S. Army Corps. The purpose of the subcommittee was to explore, understand, and develop guidance for how states and tribes can better assume the 404-permitting program by better defining which waters are assumable by states under complex law and legal and legislative history and which must be maintained by the USACOE. The committee reached agreement on alternatives for assumption for wetlands and waters. The final report was delivered to the EPA Administrator in spring 2017.

**Aspen Collaborative Water Supply Convening Assessment, Aspen, CO 2017.** CBI conducted an assessment for the City of Aspen regarding designing and convening a collaborative process among the city, County, landowners, citizens, agencies, and environmental NGOs to develop a long-term water supply study for the city, currently faced with limited and vulnerable water supply options.

**Caloosahatchee River Restoration, western Florida, 2013-15.** Co-assessor and facilitator for a visioning and prioritization process with the South Florida Water Management District and its constituents on estuarine and river habitat in the Caloosahatchee River, the western outlet of the Everglades water system. Assessment concluded with an intensive, two-day science summit involving over 100 stakeholders to identify key indicators for ecological health, and on-going implementers work group and stakeholder forums on prioritizing projects for action.

**Blueprint Columbus, Columbus, OH, 2013-15.** Facilitator and senior advisor to a two-year intensive public engagement process to test the feasibility of a alternative, distributed approach to addressing wet weather sanitary sewer overflows and storm water management throughout the City.

**Stroud Water Research Center Strategic Planning, Avondale, PA, 2014.** Facilitator for strategic planning for one of the world's leading independent freshwater research centers. Conducted staff and Board interviews, held workshops with Board and staff, worked with management to develop and hone strategic goals and initiatives for the next five years, including expanding funding, transitioning leadership, and managing a new generation of scientists.

**Finding Common Ground on Water Supply Operations and Gas and Oil Development, Denver CO 2014.** Facilitator for a project team and stakeholders to come together across water utilities and gas and oil companies to explore and find common ground on communications, operations and monitoring of water supplies proximate to unconventional shale gas and oil development.

**Effective Source Water Protection Programs for Unfiltered Water Supplies, White Plains, New York, 2014.** Facilitated 24 representatives from six utilities and five water regulators across the United States in a two-

day workshop to coalesce perspectives on source water protection (SWP) challenges and opportunities for unfiltered drinking water systems in order to create an overall framework for effective source water protection plans.

**America's Watershed Initiative, 2013.** Reviewer of the steering committee of America's Watershed Initiative, an effort to bring together diverse stakeholders and coalitions across the Mississippi River basin as part of the international Great Rivers Partnership.

**Water Supply and Wildfire, Denver, Colorado, 2013.** Facilitator of a two-day workshop with over one hundred water suppliers, public safety officials, state and federal agencies, and academics on managing the risks of wildfire for public water supplies, the initial response, and long-term recovery.

**State of Vermont and Lake Champlain Phosphorus TMDL, Vermont, 2012-13.** Co-facilitator for an intensive engagement process with the agricultural community in Vermont to develop adequate measures for addressing nutrient impacts to Lake Champlain. Work included focus groups, large public meetings, and preparing synthesis of findings, and an Agricultural Working Group (AWG) who met seven times. The AWG developed numerous recommendations and finalized their report to the Legislature and agencies in fall 2013.

**U.S. EPA Technical Workshops for Hydraulic Fracturing Study, Washington, D.C., 2011.** Facilitator for four, two-day intensive technical workshops involving agencies, academia, industry, and NGOs regarding a Congressionally mandated study on the risks and impacts of hydraulic fracturing on water resources. Topics included well chemical and analytical methods, well construction operations, fate and transport, and water resource management.

**Water Utility Research Agenda for Shale Gas Development, Baltimore, MD, 2010.** Facilitator for a project team and stakeholders to develop a prioritized research agenda for improving the understanding of the potential risks of hydraulic fracturing and associated natural gas development activities to drinking water supplies and strategies for reducing identified risks.

**National Utility Strategy for Source Water Protection, Boulder, CO, 2010.** Facilitator for a project team and stakeholders to develop background and engage public water suppliers from across the U.S. to create a joint strategy and road map for source water protection.

**Comprehensive Wastewater Management Plan, Falmouth, MA, 2010.** Facilitator of a public engagement process, including an assessment, workshops, and fact sheets, to help a Town committee develop a comprehensive, fifty-year wastewater management plan for an Upper Cape community to preserve and restore its inland and salt bays.

**Edwards Aquifer Restoration Implementation Program, San Antonio, TX, 2009-10.** Co-facilitator of a 75-participant process to develop a joint habitat conservation plan to address endangered species and diverse human uses of San Antonio's and surrounds' sole source aquifer.

**Connecticut River Watershed USACE Floodplain Modeling Engagement, New England, 2009.** Team lead for conducting nearly 50 interviews on key Connecticut River flow regimes, role of stakeholders in intensive floodplain modeling efforts with the US ACE and the Nature Conservancy.

**Assabet River Ecological Restoration, Maynard, MA, 2008-09.** Facilitator who led numerous focus groups and designed a series of workshops to address issues of phosphorus contamination, wastewater treatment, and potential dam removal for a historic river in Metrowest Boston.

**Lower Neponset River Ecological Restoration, Boston, MA, 2008-09.** Facilitator who convened and facilitated a Citizens Advisory Committee that reached agreement on the cleanup of PCBs from sediments, improvement of fish passage, and preservation of historical, Native American, and cultural resources.

**Riparian Buffers, Stormwater Management, and TMDLs for Delaware's Inland Bays, Dover, DE, 2007.**

Conducted a stakeholder and issues assessment for the Department of Environmental Control and Natural Resources given an impasse overdraft regulation intended to help the state meet TMDLs in the rapidly growing, ecologically sensitive area.

**Treated Sewage Sludge/Biosolids Public Partnering, Alexandria, VA, 2005-07.** Assisted the Water Environment Research Foundation (WERF) by preparing extensive public partnering protocols for WERF staff and management. Facilitated follow-up 35-person two-day intensive workshop developing background for an RFP and for selecting a Project Steering Committee for a health incident study. As PSC completed work, mediated issues related to work completion and principal investigator. Consensus achieved and the final product release in December 2007.

**Funding Wastewater and Stormwater Infrastructure for Delaware, 2005-06.** Facilitated the planning, dialogue, and final report writing for a 25-person state-wide dialogue, sponsored by the Delaware Public Policy Institute, on providing stable funding for stormwater and wastewater infrastructure through the state's Clean Water Council.

**Soft Path Water Technology Workshops, 2005-06.** Facilitated four, one-day workshops of diverse stakeholders from developers, agencies, environmental advocates, and others on research, regulatory barriers, public outreach and education, and strategy regarding distributed and non-structural water infrastructure solutions.

**Accelerated Recovery of the Florida Everglades, 2005.** Facilitated a two-day dialogue among South Florida Water Management District's stakeholders and the nation's leading experts on ecosystem recovering regarding proposed research projects to pilot accelerated recovery of phosphorus-impacted areas of the Florida Everglades.

**Tampa Bay Water Downstream Augmentation Issues Scoping, Tampa, FL, 2004.** Planned and facilitated two, one-day, public workshops for Agency for Bay Management and Tampa Bay Estuary Program to identify, prioritize and discuss approaches to environmental issues raised by proposed 13 mgd surface water withdrawal project.

**Aloha Water Company Customer Workshops, Tampa, FL, 2004.** Planned and facilitated two, one-day, intensive public workshops for 80 people concerned about water quality and service delivery by a 15,000-customer private water utility in suburban Florida.

**Treated Sewage Sludge/Biosolids Research Summit, Alexandria, VA, 2003-04.** Assisted the Water Environment Research Foundation (WERF) and its stakeholders to scope and conduct collaborative research. Led a 4-person facilitation team to assist the WERF, the U.S. EPA, and a 15-member Program and Steering Committees plan, prepare for, and conduct an innovative multi-stakeholder research agenda-setting summit for human health, risk assessment, pathogens, inorganics and emerging compounds for 70 participants & 100 observers.

**Florida Everglades Phosphorus Criterion Rule Development, West Palm Beach, FL, 2001.** Co-mediator who convened and facilitated three workshops and in-between meeting mediation for the Florida Department of

Environmental Protection and its stakeholders regarding the establishment of a phosphorus criterion and compliance methodology for the Everglades Protection Area.

**Connecticut Water Suppliers, Hartford, CT, 2000.** Planned and facilitated daylong consensus building effort for 50 Connecticut water suppliers to develop a strategy forward for improving the governance of water diversion and allocation.

**Massachusetts Watershed Team Leaders, Executive Office of Environmental Affairs, Nantucket, MA, 2000.** Co-taught a two-day course in advanced facilitation and consensus building techniques for watershed team leaders from across the state.

## OTHER FACILITATIONS, MEDIATIONS AND ASSESSMENTS

**Convergence Project on Reforming Federal Civil Service** Working with Convergence to initiate a dialogue around the reform of the federal civil service to increase access to interested job seekers, increase equity across the management hierarchy, create new incentives, and importantly, find the key political levers and windows in which meaningful reform can be enacted in a highly partisan and divided Congress.

**Convergence Project on Guns and Suicide** CBI worked with Convergence to facilitate a conversation among 2nd amendment rights groups, veterans, Black and Native American groups, public health groups, faith leaders, and gun control advocates. Facilitated by Pat Field, the purpose of the project was to educate one another, share perspective and values, identify programs for reducing gun-related suicides, and ultimately advance the most effective means possible to substantially reduce gun-related suicides across the U.S. The group reached consensus on its final report in November 2021 bringing together groups as disparate as the American Sport Shooting Foundation and Everytown.

**Future of America's Health Care, Washington, D.C. 2019-2020.** Facilitator of a bi-partisan, high-level group of insurance executives, medical, nurse, public health, and hospital associations, and influential thinkers from universities and think tanks exploring the future of health care to address cost, quality and delivery and move beyond the debates around the Affordable Care Act.

**Building a Better Budget Process, Washington, D.C. 2017-18.** Lead facilitator with a project team to assess, convene, and facilitate experts and users of the federal budget process to design practical reforms to the current federal budget process. Stakeholders included major left and right "think tanks," the U.S. Chamber of Commerce, the Committee for a Responsible Budget, the Taxpayers Union, and the Center for Budget Policies and Priorities, among others. Final agreement was shared in a 300 –person briefing attended by budget experts across organizations and the government in February 2018.

**North Carolina Leadership Forum, Raleigh-Durham and Charlotte, NC. 2016-17.** In partnership with Duke University and the John William Pope Foundation, the Z. Smith Reynolds Foundation and The Duke Endowment, designed, convened, and facilitated the North Carolina Leadership Forum. In five workshops over the year, 32 leaders explored the facts and trends of economic mobility and opportunity in North Carolina, created and utilized a living wage calculator, and explored policy options such as the minimum wage, earned income and child tax credits, licensure reform, and apprenticeship programs.

**Oxfam America, Boston, MA 2016-17.** Designed and facilitated numerous intra-organizational workshops for Food Systems, International Program Development, Institutional Support, in strategic planning, organizational development, and reorganization and implementation of Oxfam International's One Oxfam organizational change.

**Interior Business Center and Homeland Security, Washington, D.C., 2016-17.** Mediated a conceptual separation agreement between numerous federal agencies regarding design and delivery of a new system for managing procurement and human resources.

**EPA Office of Policy Leadership Retreat, Washington, D.C., 2014.** Designed and facilitated a two day-workshop of leadership and managers of EPA;'s Office of Policy to build stronger relationships, greater cross-division collaboration, and identify areas for greater innovation.

**Ending Veterans Homelessness, Washington, D.C. 2014.** Designed and facilitated a workshop with senior managers from Veterans Affairs, Housing and Urban Development, and Interagency Council on Homelessness to improve their inter-agency process and hone their third-year strategy for ending veteran's homelessness across the U.S. Concluded with brief assessment and workshop with initiative's cross-agency staff to improve the effectiveness of the core staff implementers.

**Westchester County Homeless and Mental Illness Service Provision Issues Assessment, 2002.** A report to consumers, families, and mental health and social service professionals on housing services for individuals who are homeless, living in and out of the shelter system, and who may have psychiatric disabilities and/or substance abuse addictions (with Merrick Hoben and Gregg Macey).

**New Hampshire Democratic Party, State of New Hampshire School Funding, Concord, NH, 2000.** Organized and co-facilitated a one-day strategy session with the Governor and state House and Senate leaders on education funding proposals before the New Hampshire legislature as part of the resolution of a State Supreme Court Claremont II decision requiring the state to provide an adequate education for all public school students.

**Aboriginal Leadership Workshop, Winnipeg, Manitoba, 2000.** Co-facilitated daylong workshop on leadership among the Manitoba Assembly of Chiefs, the Urban Aboriginal Council, and the Métis Federation.

**Harvard Mediation Program, Cambridge, MA, 1993-98.** Mediated over 50 landlord/tenant, commercial and interpersonal disputes in Cambridge District Small Claims Court as well as criminal complaints, landlord-tenant disputes, and parent-child conflicts through the Advanced Mediation Program.

#### OTHER TRAININGS AND WORKSHOPS DELIVERED

**Mercer, New York and Nashville, TN, 2016-17.** Lead trained in designing and delivery training to a lead human resources provider regarding procurement negotiations in an increasingly commoditized service industry.

**Bridgestone Americas, Nashville, TN, 2014-15.** Led a team to assist the mining and procurement divisions of the company to identify a variety of means to improve negotiation excellence. Facilitated the core, cross-functional project lead team, conducted a negotiations audit of the two divisions through extensive interviews, drafted a host of recommendations, and led two division meetings/trainings on deploying mutual gains negotiation more effectively in the two divisions.

**Shell North America Social Performance in the Community, Pennsylvania, PA 2013.** Co-trainer of a three-day course for Shell staff across the U.S. on incorporating mutual gains approaches to social performance in communities where gas and oil development is occurring.

**McDonalds Real Estate, Raleigh, NC, 2008, Pittsburgh 2012, Chicago 2013 and 2014.** Developed and taught several tailored, intensive one-day courses in mutual gains negotiation and influence for McDonald's real estate and construction divisions.

**Canadian Bankers Association, Toronto, 2011.** Developed and taught intensive facilitation course for the senior and mid-level staff of Canada's banking system trade association.

**Pfizer, Inc. Pilot Workshops, Philadelphia, Warsaw, and Berlin, 2010-2011.** Senior member of team conducting over 75 interviews across the company to assess negotiation capacity, challenges, and opportunities to develop a negotiation audit and to create a tailored, two-day intensive workshop for country teams across Europe and Latin America to improve negotiation capacity and stakeholder engagement in an increasingly cost-constrained environment. Co-taught course in Poland and Germany.

**Public Apology, Boston, MA, San Diego, CA, Philadelphia, PA, Seattle, WA, Calgary, AB, and Washington, DC, 2007-11.** Developed and co-taught half-day course in public apology for EPA Region 1, EPA Headquarters, and DOI's Collaborative Action and Dispute Resolution office, the Alberta Municipal Affairs Mediation program, the Boston Bar Association, and others.

**Veterans Administration, Bedford, MA, 2007-08.** Taught a two-day leadership and negotiation course for mid-career nurses, doctors, and administrators working for the VA.

**Genetech, Inc, San Francisco, CA, 2006.** Developed and co-taught two, two-day courses in negotiation among Genetech regulatory affairs staff.

**University of Kansas Self Fellows, Lawrence, KS, 2006.** Taught two-day course in consensus building for thirty graduate student fellows in a range of scientific and technical disciplines.

**Alberta Environmental Coalition, Edmonton, Alberta, 2006.** Taught negotiation skills and strategies to fifty community organizations, advocacy groups, and union environmental committee representatives.

**McDonalds, Chicago, IL, 2005.** Co-taught tailored, intensive course in mutual gains negotiation for twenty-five general managers working with franchisees across the U.S.

**Montana Consensus Council, Helena and Missoula, MT, Denver, CO, Lexington, KY, Tucson, AZ, Spokane, WA, Boise, ID, Seward, AK, Reno, NV, and Banff, AB, 1999-04.** Developed and co-taught numerous one and two-day courses in "Participating in Consensus Building" and "Consensus Building for Natural Resource Managers" to federal and state agencies, citizen advocates, and local and tribal planners.

**Water Environment Research Foundation (WERF), Alexandria, VA, 2004.** Developed and co-taught two, one-day trainings for WERF staff and managing in public partnering protocols and basic facilitation skills.

**Alberta Environmental Appeal Board, Calgary and Edmonton, Canada, 1998-04.** Developed and co-taught a two-day mediation course and three one-day advanced mediation courses to EAB Board members who serve as mediators as well as administrative law judges and two, two-day negotiation course to EAB Board members, staff, and First Nation, industry, and government officials in Alberta.

**United States Geological Survey, Reston, VA, 2004.** Co-designed and co-taught two-day workshop for USGS, BLM, and DOI scientists and policymakers regarding joint fact finding and science-intensive dispute resolution.

**National Aeronautics and Space Administration, Washington, D.C., 2003.** Co-taught a one-day course with the Keystone Center on risk communication and perception to the Mars and Prometheus NASA project teams.

**Oneida Tribe Natural Resources Program, Green Bay, WI, 2003.** Co-taught a three-day course in negotiation for Oneida natural resource and environment managers, staff, and scientists.

**Fish and Wildlife Service, Phoenix, AZ and Shepherdstown, WV, 2002.** Taught two, five-day courses in resolving complex environmental disputes for FWS management and biologists and other federal agency participants.

**Environmental Justice Organizations, Cambridge, MA and Los Angeles, CA, 2001-02.** Co-taught two, two-day negotiation trainings for environmental justice advocates seeking to learn about mutual gains negotiation, mediation, and consensus building.

**Environmental Protection Agency Remedial Project Managers, Philadelphia, PA and San Diego, CA, 2000-01.** Developed and taught two one-day negotiation courses at the national conference for EPA Superfund RPMs.

**Harvard University Native American Program, Cambridge, MA, Hay River, Northwest Territories, Saskatoon, Saskatchewan, 2000-01.** Designed and co-taught two-day negotiation course to various First Nations chiefs, council, staff, and provincial and federal officials.

**Environmental Health Coalition (EHC), San Diego, CA, 2000.** Co-taught two-day, bilingual (Spanish and English) negotiation training for the EHC staff and community and union affiliates.

**Metro 916 Minnesota School Superintendents, St. Paul, MN, 2000.** Developed and taught a one and one-half day seminar in dealing with an angry public for 20 St. Paul area school superintendents and staff.

**Capital One, Richmond, VA and Dallas, TX, 1999-2000.** Taught four, two-day mutual gains negotiation courses to over 100 Capital One credit card company employees.

**New England Interstate Water Pollution Control Commission, Laconia, NH, 1998.** Co-taught half day training course in consensus building to 8 state agency non-point source coordinators.

**National Park Service (NPS), Northeast Region, Bourne, MA, 1998.** Developed and co-taught two-day tailored training course in consensus building to 24 Park Service Superintendents and staff.

**International Business Machines (IBM), Atlanta, GA, 1998.** Helped develop and co-taught full day tailored training pilot course in negotiation principles to 24 new hires to be administered to all IBM Global Service new hires in 1998.

**New England Gas Association, Nashua, NH, 1998.** Co-taught half-day training in basic negotiation principles to 25 participants in the 1998 Sales and Marketing School.

**Georgia Environmental Protection Division, Atlanta, GA, 1997.** Co-taught one-day training in the mutual gains approach to negotiating environmental agreements for 25 staff of the Georgia EPD and a large company seeking to address RCRA corrective actions through collaboration rather than confrontation.

**Native American Fish and Wildlife Society, Northeast Region, Oak Bluffs, MA, 1996.** Co-taught a mutual gains negotiation skills half-day workshop for 25 tribal environmental managers and EPA and Fish and Wildlife regulators.



**Land Trust Negotiation Workshop, Clinton, MA, 1995.** Developed negotiation game and co-taught basic negotiation skills in a one-day workshop to 45 volunteer and paid staff of land trusts, historic preservation organizations, and conservation commissions across Massachusetts.

## SELECTED PUBLICATIONS AND REPORTS

Energy Siting and Land Use with Kansal, Morris, and Smith. Anthem Press, 2018.

Voices from the Land: Listening to New Englander's Views of the Future, with Lambert, McBride, Weiss, Thompson, and Theoharides, Harvard Forest and NSF's Research Coordination Network, 2018.

Increasing the effectiveness of Participatory Scenario Development through Codesign, with McBride, et.al, Ecology and Society, 22(3):16, 2017.

Joint Fact-Finding and Collaborative Adaptive in Urban Planning and Environmental Disputes, Schenck and Matsuura, chapter co-author with Susskind and Smith, Routledge, 2017.

Managing Climate Risks in Coastal Communities: Strategies for Engagement, Readiness and Adaptation with Lawrence Susskind, Danya Rumore, and Carri Hulet. Anthem Press, 2015.

Public and Stakeholder Participation for Managing and Reducing the Risks of Shale Gas Development, Environmental Science and Technology, 2014, 48 (15), pp 8388–8396, with D. Warner North, Paul C. Stern, and Thomas Webler.

Joint Fact-Finding in Urban Planning and Environmental Disputes, Schenck, et. al. chapter co-author with Griffin Smith, Routledge, 2016.

Public and Stakeholder Participation for Managing and Reducing the Risks of Shale Gas Development, Environmental Science and Technology, 2014, 48 (15), pp 8388–8396, with D. Warner North, Paul C. Stern, and Thomas Webler.

Land in Conflict: Preventing and Resolving Land Use Conflict, with Ona Ferguson and Sean Nolon, Lincoln Institute for Land Policy, 2013.

Dealing with an Angrier Public, Parts I & II, with Lawrence Susskind. ACResolution Quarterly, Summer and Fall 2012, volume 11, Issue 2 and 3.

Managing Risk and Uncertainty: Collaborative Approaches for Climate Change with Elizabeth Fierman and Stephen Aldrich, Land Lines, Lincoln Institute of Land Policy, July 2012.

The Unreliable Narrator, book review of Dealing with Differences. Negotiation Journal. July 2011 (Vol.27, No. 3).

Integrating Mediation in Land Use Decision Making: A Study in Vermont. Land Lines. Lincoln Institute of Land Policy, January 2010.

Getting Coast Smart: A Consensus-Building Approach To Engaging Communities Around Climate Change Risks. Association of Conflict Resolution Magazine. Fall 2009 (Vol. 9, No. 1).

Building Consensus, with Heather Conover. Marketing Handbook for the Design and Construction Professional. Third Edition, Building News, 2009 (Chapter 2.15, pp 173-182).

Evaluating Community-based Collaboration on Federal Lands and Resources, with Matt McKinney. Society and Natural Resources, 21(5), May-June 2008 (Vol. 21, No. 5, pp 419-429).

Responding to Streams of Land Use Disputes. A systems approach with Matt McKinney and Sarah Bates. Planning and Environmental Law. April 2008 (Vol. 60, No. 4), p.3.

Informed Consent and Public Sector Dispute Resolution. Dispute Resolution Magazine, Winter 2008 (Vol. 14, No. 2).

How Congress Seeks, Processes, and Legislates Complex Science and Technology Issues. Patrick Field, Peter S. Adler, and Jeremy Kranowitz, April, 2008.

Integrating Mediation in Land Use Decisionmaking. Report for the JAMS Foundation and the Lincoln Institute for Land Policy, December 2008.

Responding to Streams of Land Use Disputes: A Systems Approach. Policy Report #5 with the Public Policy Research Institute, University of Montana, 2007.

Building Trust in Corporate Communications. Contingencies. November/December 2007.

The Negotiator's Fieldbook: The Virtues and Limits of a Kaleidoscope, co authored with David Fairman and Hal Movius. Negotiation Journal. July 2007.

Joint Fact Finding, co-authored with Lawrence Susskind and Mieke Van der Wansem. Hanna, Kevin and D. Scott Slocombe (Eds.) 2007. Integrated Resource and Environmental Management: Concepts and Practice. Oxford University Press, Oxford and Toronto.

Building Consensus with the Team and the Community. Four part series in: Marketer (The Society for Marketing Processional Services). 2006 and 2007.

Breaking Five Myths of NIMBY to Get Your Project Off and In the Ground. Land Development (National Association of Home Builders), v. 19, no.4, Fall 2006.

Consensus Building and Dispute Resolution. Co-authored with Lawrence Susskind. Planning and Urban Design Guidelines, 2006. Wiley and Sons for the American Planning Association.

Risk Perception, Risk Communication, and Stakeholder Involvement for Biosolids Management and Research. Co-authored with Ned Beecher, Ellen Harrison, et.al. 34:122-128 (2005). Journal of Environmental Quality.

Building Consensus: Dealing with Controversial Land Use Issues and Disputes. Co-authored with Lawrence Susskind. No. 48, Fall 2002. The Planning Commissioners Journal.

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