



Fall 2011 Meeting Summary

October 5 – 7, 2011

Jackson Hole, Wyoming

MEETING OBJECTIVES –

1. Confirm the **strategic direction and investment and engagement opportunities** for members of the Intermountain West Funders Network.
2. Garner a broad overview of **major trends in the Intermountain West** and recent attitudes and opinions in the region that will help guide strategic investments in conservation, land use policy changes, and related topics.
3. Understand how one community in the Intermountain West, Teton Valley, weathered the cycle of approving an **oversupply of subdivisions that are now vacant “zombie” developments**, and how funders in the region have worked with nonprofit and public sector leaders to mitigate the environmental, economic and social damage of the development patterns.
4. Learn from nonprofit leaders, advocates, and funders in the Jackson Hole region about their efforts to **work regionally** and authentically engage stakeholders to make the community environmentally sustainable, socially equitable, and economically prosperous.
5. Build awareness about research and communications designed to **make the fiscal and business case for smart growth and sustainable development** in the Intermountain West.
6. Deepen understanding about how funders can work together and individually to strengthen the **capacity of local communities** through effective community engagement.

ATTENDEES AND PARTICIPANTS

- Armando Carbonell, Senior Fellow and Chairman of the Department of Planning and Urban Form, Lincoln Institute of Land Policy
- Randy Carpenter, Land Use Planner, Sonoran Institute
- Ken Dunn, Board Chair, Community Foundation of Teton Valley
- Chris Gates, Executive Director, PACE – Philanthropy for Active Civic Engagement
- Thomas Gougeon, President, Gates Family Foundation
- Professor Walt Hecox, Director, Colorado College State of the Rockies Project
- Patrick Horvath, Director, Strengthening Neighborhoods Program, Denver Foundation
- Hal Hutchinson, Executive Director, LOR Foundation
- Daniel Kemmis, Associate of the Charles F. Kettering Foundation, Senior Fellow at the Center for Natural Resources and Environmental Policy
- Jeramy Lund, Treasurer, Lund Foundation
- Marielle Oetjen, Consultant, Intermountain West Funder Network
- Katherine Pease, Managing Consultant, Intermountain West Funder Network
- Peter Pollock, Ronald Smith Fellow, Lincoln Institute of Land Policy
- Luther Propst, Trustee, George B. Storer Foundation
- Linda Reed, President/CEO, Montana Community Foundation
- Ben Starrett, Executive Director, Funders' Network for Smart Growth and Livable Communities
- Press Stephens, Development Director, Wyoming Community Foundation
- Elizabeth Storer, Executive Director, George B. Storer Foundation
- Lauren Tassos, Development Officer, Idaho Community Foundation
- Anna Trentadue, Program Director/Staff Attorney, Valley Advocates for Responsible Development
- Renee Villarreal, Director of Programs and Community Outreach, New Mexico Community Foundation
- Sandra Wallop, Board Member, Wyoming Community Foundation
- Rachel Winer, Executive Director, Idaho Smart Growth

DAY 1: OCTOBER 5, 2011

Regional Site Visit – Victor and Driggs, Idaho

Presenters

- *Scott Fitzgerald, Former Mayor, City of Victor, ID*
- *Sandy Mason, Executive Director, Valley Advocates for Responsible Development*
- *Dahvi Wilson, Executive Director, Teton Valley Foundation, Former Project Coordinator, Envision Victor*
- *Hal Hutchinson, Executive Director, LOR Foundation*
- *Luther Propst, Trustee, George B. Storer Foundation*

Participants went on a site visit over Teton Pass from Jackson, WY to the small communities of Victor and Driggs, ID. Hal Hutchinson and Luther Propst gave some context for these communities, which have been historically agrarian and are increasingly bedroom communities to the amenity economy of Jackson. At the Victor Town Hall participants heard from Scott Fitzgerald and Dahvi Wilson, who were instrumental in the Envision Victor project, funded by the Orton Family Foundation's Heart & Soul Community Planning program. They worked to build bridges between the fourth and fifth generation family farmers and the often younger and more recreation-driven newcomers. They used storytelling to build common ground, then keypad polling and other tools to agree upon a set of common community values. They were then able to use those agreed-upon values to build consensus for planning Victor's growth, using Placeways GIS tools to create scenarios for Victor's future - one that focused growth downtown and one that was spread out. Public meetings eventually all favored a more centralized development pattern, and a Capital Improvements Plan is in process with city council to make needed changes to implement this vision.

The site visit then moved on to Driggs, where Sandy Mason led a tour through some of the vacant "ghost" and partially developed "zombie" (not quite alive, not quite dead) subdivisions that arose after multi-generational family farms sold to developers who subdivided lots at a record level during the economic boom. There are almost 10,000 platted lots in a relatively sparsely populated county, 7,800 of which are vacant. An illustrative subdivision the group visited was only partially built, and all of the properties were bank-owned. The county has to provide services to the built properties, and it is clear there is no way that local government can afford to continue on this path. Sandy talked about the efforts of VARD and others to bring back some of this land to agricultural use and create parcels for land conservation and watershed restoration. The banks are often obstacles, because they are unwilling to devalue the properties on their books, while for the county they are a source of negative value because of the infrastructure commitments they represent.

DAY 2: OCTOBER 6, 2011

9:00 – 10:15 Opening Session with Introductions and Site Visit Debrief

Katherine Pease welcomed the group and explained the meeting objectives and desired outcomes. She asked all participants to introduce themselves and mention something in particular about their work that connects them to the mission of IMWFN. Chris Gates and Ben Starrett welcomed the participants on behalf of the IMWFN Steering Committee and thanked the hosts of the meeting: George B. Storer Foundation, LOR Foundation, and the Community Foundation of Jackson Hole. Katherine thanked everyone who supports the IMWFN including its core supporters: Funders' Network for Smart Growth and Sustainable Communities, PACE – Philanthropy for Active Civic Engagement, L.P. Brown Foundation, Orton Family Foundation, Lincoln Institute for Land Policy and the George B. Storer Foundation.

Katherine then led the group through a debrief of key takeaways from the site visit to Victor and Driggs, ID. Participants mentioned the potential for extraordinary community engagement projects, but also the drawbacks of projects like Envision Victor, when community engagement and agreement on values does not necessarily mean the political will has been built to pass ordinances to carry out the plans. Driggs is an incredible case study given the scope of the failed developments and foreclosures. There is a lot of work to do in finding ways to link these properties to create conservation and sustainable use opportunities. There was a lot of interest in the role of banks, and ways to work with them to be more constructive partners. The scope of the failures adds to the sense of how IMWFN and others can use this story to educate other communities and politicians to avoid a similar fate. The elected officials and others behind the bad decisions thought they were helping people, and believed in the farmers' rights to use their land the way they wished. In the West in particular there is a tension with trying to reconcile the strongly held value of personal property rights with smart civic planning.

Opening Keynote Presentation, Walt Hecox, Director, Colorado College State of the Rockies Project

Sustainable Development in the Mountain States: Is the Time Right or Will it Ever Be?

The slides for this presentation can be found at: <http://katherinepease.com/IMWFNHecox.htm>

Professor Hecox gave an overview of the Colorado College State of the Rockies Project and their Report Cards issued over the life of the project. He reviewed keynote presentations from previous IMWFN convenings and some of the key themes that relate to the current state of the region. He then reviewed the “Conservation in the West” public opinion poll conducted in five of the Rocky Mountain states in January 2011. The poll collected data on voter attitudes towards the economy,

environment, quality of life, energy, land use and other issues related to the work of IMWFN. The results highlight the strong connection voters feel for natural elements of their environment, and their concern for the economy and budget cuts negatively impacting those aspects of their quality of life. At the same time, they largely believe that having a good economy and protecting land and water are compatible and not inevitably in conflict.

Professor Hecox asked the group for feedback on what questions the poll might incorporate in the future, and opened a discussion about the implications of the data. This poll is similar to a national Harris Interactive poll in pointing out the disparities in voter opinion versus behavior change, for example around enforcement of environmental regulations. There is a real need to drill down into these differences, to help understand behaviors as much as attitudes. Some participants expressed hope for more analysis of the differences between rural and urban voters in future polls, as well as perspectives of natives and newcomers. A major surprise in the polling was the finding that 84% of respondents viewed poorly planned development as a major problem, even in the current economy.

Discussion continued about the differences between attitudes and behaviors and how to motivate people to change in ways that they say they care about. For example, in one community where recycling was mandated, there was less compliance than when it was framed in terms of neighborhood competitions. It also becomes important to see the frame to which people respond best, as in the differences between people identifying as a conservationist much more readily than environmentalist, or when transit is framed as something better for you since it gets other people off the roads.

This poll will be conducted annually. The State of the Rockies Project is open to feedback on changes. There is a great deal of raw data available from the poll that there are no current funds to develop, but it will be available for study in the future if resources permit.

Funder Dialogue

Katherine began the session by asking: What are some of the questions or challenges you are having with your work as it overlays the work of the IMWFN? After sharing individual ideas, the following areas of synergy emerged: rural futures, particularly around rural economies; banking and finance; capacity and leadership; the IMWFN and how it does/will do its work; community engagement; and open space and large landscapes. The group then broke into three small groups to further discuss the particular themes.

- ***Community Engagement & Hope*** – Ultimately the focus of this group discussion was the role of community foundations in working within a community to bridge the silos of business, nonprofits, schools, churches, and other areas. Even within these silos the parties

might not be talking with one another, so it is possible to start even at that level to get people talking about their values, goals, and so on, and then help them cross the boundaries with those outside their silos. A small amount of money given to each group to do a project and allowing them to be successful together can be a big push towards long term results.

- ***Rural Futures*** – This group continued the discussion that started on the bus on the Victor/Driggs site visit about banks and financial institutions and what intervention with them for the sake of rural communities actually look like. It is probably easier to use Teton County as an example of what not to do and emphasize prevention in other areas. However, it is possible to think about advocacy, even if in the background, and how it might be useful in helping banks see ways forward to get properties like the ones in Driggs out of the current circumstances and into a use that is better for the whole community. The Denver Transit Oriented Development Fund might be a good model to look at in order to learn useful tactics for other situations and places.
- ***Capacity & Leadership*** – The members of this group talked about various models of leadership training and cultivation, such as the one at the Ford Family Foundation. There is a clear need for building, developing, training and sustaining community leaders, improving their abilities to run organizations and keep people engaged. There is a program at the Land Trust Alliance that might be useful to look at as a model. Funding is always a challenge in creating and sustaining successful organizations, especially since all-volunteer organizations face more turnover and burnout. Continuing to find ways to get people out of their silos is often beneficial to engaging people, helping them connect to each other instead of telling them what to do.

Making the Fiscal and Business Case for Smart Growth and Sustainable Development

Presenters

- *Armando Carbonell, Senior Fellow and Chair of the Department of Planning and Urban Form, Lincoln Institute of Land Policy*
- *Randy Carpenter, Associate Director Northern Rockies Program, Sonoran Institute*
- *Anna Trentadue, Program Director, Valley Advocates for Responsible Development*
- *Rachel Winer, Executive Director, Idaho Smart Growth*

Armando Carbonell began the session with a challenge to the group to think about the differences between theories, empirical evidence, and principles regarding smart growth and local economies.

He then introduced the panelists who discussed case studies that bring out different elements of fiscal and business arguments for smart growth and sustainable development.

Randy Carpenter began by talking about the disconnect that often happens between what people value and say that they want and what actually happens with development in a community. Comprehensive plans almost all say the same thing: “We love our rural landscape and want to preserve it”; “we want to protect our wildlife”, etc. Very few of these plans are successfully implemented, because development interests drive political decision-making, or because people put their values of private property rights higher than other priorities. To counteract these pitfalls there is a need to develop other convincing arguments, for example to demonstrate how spread-out development patterns can create unsustainable needs for public services. With the deep recession there is an opportunity to show the public and private sectors that what has been done has not worked. Randy shared examples of tax revenue and fiscal impact studies that helped encourage more central development rather than outer ring retail. There are drivers such as demographics, consumer preferences, increasing energy costs and environmental concerns that are favoring smarter growth patterns and it will be increasingly important to identify them and influence developers and public officials to better enact them.

Anna Trentadue introduced tools that VARD developed with the Lincoln and Sonoran Institutes called the Fiscal Impact Planning System (FIPS). The tool can be used with existing or planned developments to help project the costs and benefits to a local government of a certain property. The tool has helped VARD argue against far-flung developments in which taxes and developer fees do not come close to offsetting the services that will be required for them. It is also helping in figuring out which of the ‘zombie’ subdivisions might be better situated for future build out and which ones might benefit from rezoning. FIPS is a huge change from developer-provided fiscal impact analyses which always showed great fiscal benefits to a community with no or low cost of government services. The county has officially adopted FIPS to use for any rezoning, subdivision requests, etc. They hope to add other elements to the tool for other tax bases, such as the school and fire districts. The tool has been great to add health, safety and social welfare arguments to the conversation about growth.

Rachel Winer opened by asking why, given that there is a lot of data showing that smart growth is less expensive for communities, do they not choose it? She gave some context for her organization’s work in Idaho, which is ranked fourth in growth rate in the U.S. She noted that in many communities elected officials and voters:

- Do not know the fiscal benefits of smart growth; in some states, such as in Idaho, this is particularly true because 180 of Idaho’s 200 cities have less than 10,000 people and lack capacity to have another party review developer documents and challenge their data.

- Do not believe smart growth arguments. For example they mistakenly believe that smart growth means no growth, that growth pays for itself, or they invest in the Western mythology of the supremacy of private property rights.
- Do not care about or think it is too hard to have smart growth. There is a huge turnover in elected officials, and they fight to have development near them.

In response to these issues Smart Growth Idaho is working on better communications that minimize jargon and develop messengers who will be better received. In addition, they are working to collect and disseminate better data, creating case studies of model communities with whom other communities can identify. Finally, they are working on advocacy work and legal assistance, helping officials and communities have a better way to say no to unchecked development and helping them to find ways to make it less expensive and easier to have growth in the places it makes more sense.

Reception and Dinner at the George B. Storer Foundation

Liz Storer and Luther Propst from the George B. Storer Foundation hosted a reception and dinner in Jackson for all IMWFN convening participants and a number of local guests active in Jackson land use and growth issues. Ben Starrett introduced the guests to the history and work of IMWFN.

DAY 3: OCTOBER 7, 2011

Breakfast Session by Daniel Kemmis, Associate of the Charles F. Kettering Foundation, Senior Fellow at the Center for Natural Resources and Environmental Policy

Building Community Capacity in the Intermountain West

Dan discussed using the notion of “The Body Politic”, or the embodied notion of public life, to help frame the idea of community capacity building. It has become fashionable to use ‘community’ for just about anything, but he uses it to mean a particular place and people, with its own personality and identity. One way to think of capacity building is a community getting itself in shape and becoming healthier. A major resource that we have in building capacity is that communities generally have a sense of pride, and part of the challenge can be bringing it to the surface when it’s quiescent. Getting people to tell stories about their connections to their communities can be an important first step to bring out that sense of community. On the political side, leaders can appeal to the sense of individuals really belonging to one body, and rising above the divisions. It often comes out after a natural disaster or when a community experiences the loss of an important leader, but it can be hard

to make that sense of connection last. When community capacity has been built over time though people will be able to move on, build institutions, and get things done.

Dan noted that community foundations are a relatively new and tremendously important phenomenon. They are well positioned to help communities build capacity in the ways that are needed. By IMWFN encouraging the participation of community foundations in the network it can help build community capacity at the town and city level, and sometimes within specific parts of a larger urban area. In order to build capacity at a larger scale, it's necessary to look at larger geographic bodies such as regions, watersheds, and ecosystems. For example, Ralph Becker, the mayor of Salt Lake City, led a collaborative effort to deal with an issue that wouldn't have worked on a smaller scale, engaging the regional area to deal with water on the Wasatch Front. Dan believes that while all regions of the country have some sense of connection of people to the land, there is no place where place and landscape is so fundamental as to who we are as a people as it is in the West.

Following Dan's presentation the idea of community foundations having a unique ability to get people out of their silos and working together on common problems was further discussed. Small investments of money and social capital can bring great long-term results. For example the Wyoming Community Foundation offered a small grant to a group who came together on one discrete educational issue, and later the same people got together to do strategic planning for that community.

It was also stressed that it is important to build intergenerational capacity and a stronger sense of community belonging, since most of the problems we are tackling are long term. In addition, a lot of leadership programs in communities are directed at employees of private business, since they can pay, but intentionally investing in nonprofit leaders can give a community a cadre of issue-oriented leaders who can drive community change. Funders can play an important role in convening leaders and helping them see what works in one place and share ideas and problems. There are areas of shared values, like health or local food that can get people thinking regionally. With some of the corporate and government changes there are fewer private and public sector leaders based in local communities, and community foundations and their partner organizations can step into those leadership roles.

Moving Forward: Proposals for Active Learning and Engagement in the Intermountain West Funder Network

The group reviewed the Engagement & Investment Opportunities document that was developed by participants at the IMWFN Sundance convening and the Steering Committee.

Community Capacity Building – This group intends to build a portfolio of case studies to highlight ways in which funders are involved in capacity building. Two important elements are what

an active funder role as a convening organization looks like in these case studies, and what the distribution plan is for the case studies in order to ensure they are useful.

There is a potential partnership with Philanthropy Northwest for this group, although there is not an exact geographic overlap. An important challenge is that the body of knowledge on capacity in organizations is fairly strong but it is not as clear in working with communities what the key factors indicating capacity are. The group agreed that when documenting these case studies that framing them as potential strategies for other funders and communities rather than a story of a success in a certain place is important. **Linda, Ken, Patrick, and Lauren agreed to participate in this group.**

Small Grants Program – The IMWFN’s small grants program intends to lift up innovative projects throughout the region. Providing seed money and technical assistance can help build a set of tools and ideas for others to use. While with the community capacity building group the central actor is the funder, here the focus is on broad strategies and ideas for problem solving in the region.

The group discussed an area of creative tension – do you research and reward successful examples of capacity building and innovation, or do you use these grants as a carrot to help bring nascent ideas forward? It’s also possible to combine them, asking applicants to tell how they have already rallied and built capacity around an issue that a small grant could help solve. Given the relatively small grant size this program might be best positioned to bring forward new ideas and new players, or find an existing group that needs a small push.

It was agreed to prioritize funding on strategies for **how** projects are getting done over a focus on particular issue areas like water or land use. It will be possible for community foundations and other IMWFN participants to offer support and technical assistance even if they are unable to financially contribute at this time. Other potential roles for community foundations include acting as a local co-grantor and providing matching funds. The group decided on moving forward with the small grants program with a preference but not requirement for having a community foundation as a local partner for potential grantees. **Renee, Ben, Jeremy, Hal, and Liz will work in this group.**

Fiscal Case for Smart Growth

There have been a lot of studies and work done in this area but the intent of this group is to find successful cases that are accessible to people who are not immersed in the planning profession. The initial idea is to hire a consultant who is first and foremost a communications specialist to create key messages and a communications piece that IMWFN can disseminate in the funding community, online, etc. The audience would be funders and NGOs, to help persuade them to take these issues on in their communities. A main concern is that over time it has become clear that just having more and better facts won’t help make a case to elected officials or the public. There is something going on culturally that may require an investment to understand what’s behind it. There may need to be a

second stage in this area with a campaign focus, like the successful efforts to change opinions and attitudes about drunk driving.

The depth of the current recession and bust in the West is a huge opportunity. A lot of those in the potential audience for fiscal arguments are already networked in associations for planners, developers and elected officials. This group can think through how IMWFN is connected to some of these associations and how to have influence there. The idea of how to get people to act in their best interest, fiscal and otherwise, is important in the West but clearly elsewhere as well, and it may be useful to temporarily table IMWFN's efforts in this area and get input from people working on it in other areas.

After discussion it was agreed that this small group will work first towards presenting a session at the TFN conference in Seattle in March. The intent is to find out from a funder audience what materials and what kind of campaign would be useful for them and their partners. **Luther, Peter, Hal, and Tom will work in this group.**

Intermountain West Funder Network – Budget & Membership

The group reviewed IMWFN's budget and the pledges of support. Convening participants support having a membership structure to help encourage commitment and investment. Community foundations can have a dual membership with TFN and IMWFN. Now that there is more staff capacity it will be possible to look at membership outreach to other funders in the region and increase the diversity of the membership.

There have been concerns raised by previous and potential IMWFN convening participants that the locations have been great but expensive. A decision was made to hold spring meetings in major cities and fall meetings in more rural locations to help encourage broad participation.

Ideas for future convenings include having urban and rural affinity groups, a panel on the role of financial institutions in smart growth, and the needs of lower income people and communities of color when balancing community growth and meeting basic human needs.

The spring meeting will take place in Denver, Colorado, with dates to be determined. Possible locations for the fall 2012 meeting are Arizona and Montana.

Meeting adjourned with thanks to all of the local hosts.