

Develop Portfolios by Understanding Interests

Your task for July/August

Congratulations! You've done your Recon, you've completed the Scenarios, and you've built and evaluated some Portfolios. Now you can use all that you've learned to start to develop viable Portfolios that are acceptable to the Committee. At the July meeting you will get a good understanding of each Committee Member's interests. In-between the July and August meetings you will work together in small groups to develop proposed Portfolios and at the August meeting you're going to discuss how well each proposed Portfolio considers the interests of other Committee Members.

Instructions for Building Portfolios

- Organize a group of no more than seven Committee Members who will collaborate to design a Portfolio. It's up to you to decide who you want to collaborate with. You can work with people who share many of your perspectives, or you can form a group of relatively dissimilar Members. Tell Nicholas when you have formed a collaborative group or if you are still looking for a group. He'll help you find a group if necessary.
- Each group will prepare one or two Portfolios that deliver a safe, adequate, reliable, affordable and environmentally sustainable water supply to Santa Cruz.
- If you represent a specific stakeholder group, you must actively consult with members of that stakeholder group as you do this task so that you are confident that the Portfolio reflects the perspectives of your constituency. If you think that the objectives of your constituency can best be advanced by adjusting its interests, you must discuss this with your constituency and bring them along with you as your thinking develops.
- For your Committee to succeed you will need to meet the interests of other Committee Members as well as your own interests. If you think it's worthwhile to incorporate others' interests at this early stage, please do so. You may find that this reassures others about your authentic interest in collaborating with them.
- Stay compliant with the Brown Act! Create collaborative groups of no more than seven Committee Members. Don't discuss the content of your Portfolio while you are organizing your group. Once you've organized your collaborative group you may only discuss your task with the other members of your group. If you discuss your work with those who are not Committee Members, tell them not to describe your discussion to other Committee Members. This isn't an ideal way to do this, but it is the best that the Brown Act will permit!
- Deliver your report to Rosemary no later than 3:00 p.m. on Friday, August 7. Use the template that we will provided for you at the meeting, and leave it in its native format (i.e. don't convert it into a pdf). Make sure that it's ready to be added to the Packet.

Your Proposed Portfolio

Use the Portfolio Template to be sure that you've included all the necessary information in a format that is easily comparable. Here's what you must include in your report:

- Describe your proposed Portfolio. You may include contingent plans (Plan A, Plan B, etc.). If you do you must include the “triggers” that describe the contingency. You may propose a series of more than two contingent Plans (e.g. include Plan C, D etc.). Your group may propose one or two Portfolios.
- Using the criteria and rating scales developed for the MCDS tool, rate your proposed Portfolio
- Describe how your Portfolio does or does not consider the interests of every Committee Member. Identify the interests that were difficult to accommodate and explain anything that made them particularly difficult.
- If you decide that it would be worthwhile to modify any of your own interests in order to better provide for the interests of others and to move your Portfolio forwards, please do so and explain what you did and why.

Follow-up at the August Meeting

At your meeting in August you will get a chance to review everyone's Portfolios, and discuss how well the various Portfolios meet or fail to meet your interests as well as the interests of others. In the process you will also learn a great deal more about the “deep” interests of your fellow Committee Members.

Your Resources for this Task

July Meeting: Understanding interests

Much of the July meeting is dedicated to understanding the interests that each of you revealed using MCDS. Review the materials provided by Carie and Philip. The information in there will provide important information about the perspectives of your fellow Members that will make your work on this task much more productive.

Tech-Team support

The “Building Blocks” have been developed for your use in this task. We will help your collaborative group to schedule a conference call with members of the Tech Team where you can bring your questions about the assembly of the Building Blocks and get answers that help you create an effective Portfolio. In order to comply with the Brown Act, Members may only attend one of these conference calls and attendance at each will be limited to no more than seven Members.