

**CITIZENS JURY[®]
HANDBOOK**

The Jefferson Center

2004

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Citizens Jury Handbook

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	<u>PAGE</u>
SECTION 1: BACKGROUND AND HISTORY	3-10
Chapter 1 Introduction	3
Chapter 2 Overview of the Citizens Jury Process	5
Chapter 3 Jefferson Center	10
SECTION 2: PLANNING A CITIZENS JURY PROJECT	11-21
Chapter 4 Project Structure	11
Chapter 5 Project Staff	12
Chapter 6 Timeline	14
Chapter 7 Scope	17
Chapter 8 Sponsorship	18
Chapter 9 Budget	19
SECTION 3: KEY ELEMENTS OF A CITIZENS JURY PROJECT	22-68
Chapter 10 Advisory Committee	22
Chapter 11 Jury Selection	24
Chapter 12 Establishing the Charge	34
Chapter 13 Developing the Agenda	37
Chapter 14 Witnesses	43
Chapter 15 Logistical Issues	48
Chapter 16 Hearings	54
Chapter 17 Wrap-Up, Follow-Up, Evaluation	57
Chapter 18 Media	60
Chapter 19 Moderators	65
SECTION 4: SAMPLE DOCUMENTS	69-112
Sample Documents List	69

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Chapter 1

INTRODUCTION

What is a Citizens Jury?

Our democracy is based on the idea that elected officials and public agencies carry out the will of the people. Our government exists to serve all of us. Frequently, however, public policy decision-makers have a difficult time knowing exactly what the public wants to do about an issue. They may hear from lobbyists or a few activists, but rarely from a broad cross-section of citizens. Public opinion polls can tell officials what people think in a knee-jerk response to a telephoned question. The actual “will of the people” may be something quite different.

The Citizens Jury process is designed to allow decision-makers to hear the people’s voice. A Citizens Jury provides an unparalleled opportunity for citizens to learn about an issue and deliberate together to find a common ground solution. Decision-makers who watch a Citizens Jury project in action or listen to a jury’s recommendations are able to learn what an informed public wants, and why. This information can be an invaluable resource for elected officials and other decision-makers at the local, state, and national levels.

The great advantage of a Citizens Jury is that it yields citizen input from a group that is both informed and representative of the public. Involving citizens in a high quality dialogue about a key issue ultimately leads to increased public support for the resulting policy. The Citizens Jury process is an effective way to involve citizens in developing a thoughtful, well-informed solution to a public problem or issue.

In a Citizens Jury project, a randomly selected and demographically representative panel of citizens meets for four or five days to carefully examine an issue of public significance. The jury of citizens, usually consisting of 18 to 24 individuals, serves as a microcosm of the public. Jurors are paid a stipend for their time. They hear from a variety of expert witnesses and are able to deliberate together on the issue. On the final day of their moderated hearings, the members of the Citizens Jury present their recommendations to the public.

Special characteristics of the Citizens Jury process

Random Selection of Jury Pool:	The members of the jury pool are randomly selected through scientific polling techniques.
Representative:	Jurors are carefully selected to be representative of the public at large. No other process takes such care to accurately reflect the community.
Informed:	Witnesses provide information to the jury on the key aspects of the issue. Witnesses present a range of perspectives and opinions. The jury engages the witnesses in a dialogue to guarantee that all questions are answered.

- Impartial:** Witness testimony is carefully balanced to ensure fair treatment to all sides of the issue.
- Deliberative:** The jury deliberates in a variety of formats and is given a sufficient amount of time to ensure that all of the jurors' opinions are considered.

What a Citizens Jury delivers

Useful citizen input. Citizens Jury projects generate thoughtful, informed, and constructive citizen input that helps public officials make tough choices.

Common ground solutions to difficult problems. By bringing people together and providing an opportunity for them to learn and deliberate as fellow citizens, a Citizens Jury is able to identify areas of agreement and build common ground solutions to challenging problems.

Learn public's values, concerns, ideas. A Citizens Jury allows decision makers to hear directly from citizens, and to learn about their values, concerns and ideas regarding a particular issue or problem.

Focus media and public attention. The planning and implementation of a Citizens Jury can focus the attention of the media and the public on a particular issue of situation. In addition to traditional media coverage, a dynamic web site can keep people engaged with an issue after the actual Citizens Jury.

Learn what informed citizens want, and why. During the Citizens Jury hearings, and in their open report to decision makers and the public, jurors share their recommendations and the reasons for their conclusions.

Respectful and focused public discussion. Citizens Jury projects are professionally moderated by two facilitators who create a safe, respectful and focused environment. All participants and witnesses are treated with utmost respect. The daily agenda for a Citizens Jury is carefully constructed to allow sufficient time for the jurors to complete their work.

Allow citizens to learn in-depth about a key issue. Members of a Citizens Jury hear from background and advocate witnesses who provide a wealth of information and insight about the issue. Media and web coverage can spread information to everyone.

All sides can present their ideas. A Citizens Jury is an opportunity for people on various sides of an issue to present their ideas to an attentive group of citizens.

Chapter 2

OVERVIEW OF CITIZENS JURY PROCESS

Elements of a Citizens Jury Project

Advisory Committee

The Advisory Committee is composed of approximately 4-10 individuals who are knowledgeable about the issue. Members of the Advisory Committee represent a variety of perspectives and opinions.

The role of the Advisory Committee is to assist the Jefferson Center in identifying key aspects surrounding the issue. The Advisory Committee advises the project in such areas as the charge, agenda development, and witness selection. The interest of the Advisory Committee is in the integrity and fairness of the process as a whole, not in a specific outcome. They are also on alert for any bias throughout the entire project.

The members of the Advisory Committee are important *advisors* to the project, but the project staff makes all final project decisions.

By including individuals from a variety of perspectives in the planning stages of a Citizens Jury project, the final agenda and witness list cover a wide range of relevant opinions and perspectives.

Telephone Survey

The use of a random survey to form the jury pool is an essential part of the Citizens Jury process. The process of random selection is one of the key elements that sets the Citizens Jury process apart from many other citizen engagement processes.

The survey starts with the purchase of randomly generated telephone numbers from a reputable sampling company. The survey, constructed by the Jefferson Center, is developed to obtain both attitudinal and demographic information about the survey respondents.

All survey participants who indicate an interest in the project receive additional information about the project, the Jefferson Center, and the sponsors.

All respondents who are sent information are assigned a control number for future reference. Using a control number allows the project staff to track potential jurors in a fair and unbiased manner.

Identifying potential jurors through a random and scientific method is a critical step towards creating a jury that truly reflects the public as a whole.

Jury Selection

Creating a jury that is truly representative of the given community (city, state, nation or whatever) is yet another element unique to the Citizens Jury process.

In creating a jury that accurately reflects the public, a number of key steps are taken. These steps are essential to maintain the integrity of every Citizens Jury project.

Five demographic variables and one attitudinal variable are usually used to create a representative jury. The traditional demographic categories used are age, gender, educational attainment, race, and geographic location within the community. In some projects, certain variables may not be relevant. In such cases, other applicable variables such as political party affiliation or number of children are employed. In addition, one variable that reflects the general attitude towards the issue is employed. The project staff, with advice from the advisory committee, takes great care to determine the relevant variables to use in selecting jurors.

Targets for each variable are established based on recent census data or other recent reputable surveys.

All of the randomly selected survey respondents who receive information are placed into the jury pool. The members of the jury pool are categorized based on the identified variables. A grid containing the pre-determined variables is used to track the jury pool.

Final jury selection consists of selecting identification numbers off the grid until all the targets are met in the best possible configuration. Great care is taken to ensure balance within categories in addition to meeting the established targets.

Alternates are also chosen carefully. Therefore, the final jury is a representative microcosm of the community, regardless of any last minute changes.

Since Citizens Jury projects are held over several consecutive all-day sessions, jurors often need to make arrangements in their schedules. Therefore, the jury selection date is approximately 4-6 weeks before the hearings, allowing jurors to make necessary arrangements.

Jurors participating in the project receive a stipend at the conclusion of the project. The purpose of the stipend is to encourage participation by allowing jurors to take time from work and to offset childcare or travel expenses.

Careful and scientific jury selection guarantees that the jury reflects the community. Scrupulous jury selection allows the jury to generate a “trustworthy voice of the people.”

Witness Selection

Expert witnesses include neutral resource people, stakeholders, and advocates from various sides. Witnesses are carefully selected to present a balanced yet complete picture of the issue.

Neutral resource witnesses provide an overview of the issue on the opening day of the hearings. These witnesses help jurors learn new terms and can provide a brief history of the issue. They are essential in making jurors feel comfortable with the subject matter.

Stakeholders and advocates present a specific perspective or opinion on either a certain aspect of the issue or on the issue as a whole. They often present informational material as well, but their main role is to explain their position.

The project staff ensures that the jury hears from a diverse set of witnesses who represent the many different perspectives of the issue.

By having witnesses from a variety of perspectives, the jurors become fully informed about the issue in a balanced and impartial manner. The dialogue between jurors and witnesses allows the jury to fully understand the issue and the varying perspectives.

Charge

The charge is the task facing the jury. It usually takes the form of a question or series of questions that the jurors will address and answer. The charge defines the scope of the project and will guide the work of the jurors and the testimony of the witnesses.

The charge is one of the most critical pieces to a smooth Citizens Jury project. Great care is taken to ensure that the charge is neither too broad nor too narrow.

The questions of the charge may address separate and distinct issues or may be a series of connected questions. The charge can consist of main questions with subquestions, but the more questions the jury must answer, the less in-depth their responses to each question.

The jury may choose to go beyond the charge, but the charge questions are top priority. The jury may also choose not to answer a charge question or to answer it in a different way, but the jury must provide detailed reasons for altering the charge. The Advisory Committee provides advice and direction to Jefferson Center project staff regarding the charge.

The charge focuses the jury on the issue and provides a framework for the jury's recommendations.

Hearings

The agenda for the hearings is carefully planned by project staff. Setting the agenda for the hearings includes planning the order of witnesses, deliberation sessions, meals,

breaks, and more. A Citizens Jury typically meets for five consecutive days, from 8:30 AM to 4:30 PM.

The first day of the hearings introduces the jury to the Citizens Jury process, provides a general overview of the issue, and allows the jurors to get to know each other. It is very important to create an atmosphere where all jurors feel comfortable participating. Establishing ground-rules and rules of procedure in the beginning are a critical part of the process.

Over the next few days of the hearings, the jurors learn about the issue, the underlying topics, and the different perspectives. The agenda is set to allow time for juror discussion and deliberation throughout. Both small and large group discussions are included in deliberations.

Witness presentations are structured to allow for questions from the jurors. In addition, witness panels are often used to illustrate both common ground and fundamental differences between witness perspectives.

A team of two moderators professionally moderates the entire hearings.

Presentations conclude by the afternoon of the second to last day. The remaining time is dedicated to final deliberations and answering the charge questions. The morning of the final day is spent finalizing the jurors' recommendations and reviewing the initial report that is issued on the afternoon of the final day.

The week-long hearings are carefully designed to allow the jury to learn from witness presentations, ask questions, and deliberate in a variety of formats. A significant amount of time is dedicated to discussion and deliberation among the jurors.

Recommendations

On the afternoon of the final day, the jury issues its findings and recommendations in a public forum. An initial report is issued at this time. The recommendations appear in language that the jurors themselves develop and approve.

The jury appoints representatives from the jury to present their recommendations at the public forum. Depending on the issue and the scope of the project, those in attendance at the forum range from sponsors and interested citizens to press and public officials.

A final report of the project is completed within three weeks of the hearings. The final report includes additional information about the project, as well as the jury's recommendations. The recommendations remain in the approved language. All final reports are made available to the public.

The recommendations accurately reflect the will of the jurors. The Citizens Jury process generates a "trustworthy voice of the people."

Evaluation

All jurors are asked to complete an evaluation of the project. The jurors evaluate the process, various parts of the agenda, and project staff. One of the most important questions asks the jurors if they feel the project was biased.

The jurors are also given an opportunity to write a personal statement about the project. The jurors may comment on the process, the project, the issue, or their own perspective.

The results of the evaluations and all personal statements are included in the final report.

The evaluations and personal statements provide the jurors with another opportunity to express themselves, both as a group and as individuals. The evaluations and personal statements also allow the Jefferson Center to improve future projects.

Chapter 3

JEFFERSON CENTER

What is the Jefferson Center?

The Jefferson Center is a non-profit, non-partisan organization founded in 1974 to strengthen the democratic process by generating citizen input on matters of public importance. The central focus of the Jefferson Center is its trademarked Citizens Jury process. Between 1974 and 2002 the Jefferson Center conducted or assisted 30 Citizens Jury projects on a wide range of issues.

The Citizens Jury concept was developed by Ned Crosby, founder of the Jefferson Center. The Citizens Jury process has undergone a number of changes as it has been developed by the Jefferson Center over the years. The process and principles outlined in this handbook reflect the evolution of the Citizens Jury as of 2002.

Traditionally, the Jefferson Center maintained an office and a staff with expertise and experience in planning and conducting Citizens Jury projects. A project sponsor would contract with the Jefferson Center to plan, conduct, and write-up a Citizens Jury project. There were variations on this model. In 2002, after conducting a series of successful Citizens Jury projects, the Jefferson Center entered into a new phase as an information and resource provider to others interested in the Citizens Jury process.

The wealth of knowledge, experience, and expertise of the Jefferson Center now exists in this handbook, other Jefferson Center publications, as well as a list of consultants, mostly former staff, who are available to advise, supervise or conduct Citizens Jury projects. The Jefferson Center still exists as a non-profit organization, but no longer maintains an office or a full-time staff. The Jefferson Center acts as a portal for individuals, organizations or agencies interested in learning more about the Citizens Jury process or in conducting a Citizens Jury project. The Jefferson Center maintains and protects a trademark on the Citizens Jury process. In addition, the Jefferson Center maintains an informative website, www.jefferson-center.org. This handbook can be downloaded from the website.

Jefferson Center and the Citizens Jury Trademark

The Jefferson Center continues to protect its U.S. trademark “Citizens Jury.” This is done only to preserve the integrity of the process, and not to discourage others who wish to conduct a trustworthy Citizens Jury project. The trademark has standing only in the United States. Anyone in the U.S. wishing to call a project a Citizens Jury must first obtain permission from the Jefferson Center.

The Jefferson Center is eager for others to use the Citizens Jury process. The Center will work with those interested to ensure the project complies with the primary principles and standards of the Citizens Jury process. Please contact the Jefferson Center at this email address: mail@jefferson-center.org

Chapter 4

PROJECT STRUCTURE

The project structure may vary from project to project, based on the objectives, sponsor(s), staff, funding, issue, etc. However, every Citizens Jury should have a **project director** who is responsible for overseeing the entire project, assisted by **project staff**. In addition, each Citizens Jury must have an **Advisory Committee**, although the make-up and function of the Advisory Committee can vary between projects. (Each of these elements is discussed further in other sections of this handbook.)

To protect the integrity of the Citizens Jury process, it is advisable final decisions about the project are made by the project staff, based on input from the Advisory Committee and other entities.

Traditionally, the project staff, including the project director, is separate from the sponsor (or final policy decision-maker) of the Citizens Jury project. This helps to ensure that no one entity can exert an undue influence on the project. The duty of the project staff is to protect and preserve the integrity of the process, not to ordain any specific outcome.

Another structural element which has proven to be helpful in past Citizens Jury projects is to appoint a **working group**. The members of the working group tend to be more closely associated with the sponsor, and may or may not also be members of the Advisory Committee. The function of the working group is to ensure that the project is being planned in such a way as to fulfill the needs and objectives of the sponsor(s), while the project staff ensures that the integrity of the Citizens Jury process is maintained. The working group provides the project staff with a channel to solicit input from and check-in with those closely associated with the sponsor. A working group also allows for candid discussions concerning input from Advisory Committee meetings.

The working group should be relatively small, less than 5 people. This group will likely meet several times throughout the planning process, and will also be heavily consulted through e-mail and telephone as questions, concerns, and problems arise. This group will also be a very helpful resource to help the project staff gain access to key individuals.

The working group should also include the main staff person or point person from the sponsor. This structure will ensure that the sponsor remains 'in-the-loop' throughout the planning process.

Chapter 5

PROJECT STAFF

The primary duty of the project staff is to ensure the integrity of the Citizens Jury process. The project staff has no interest in the specific outcome of the project. The project staff must work exceptionally hard to keep their own personal opinions and views out of the process, and must put forth significant effort to ensure that all stakeholders and participants feel that their own views are being taken seriously and considered in the planning process of the Citizens Jury project. Persons working on Citizens Jury projects must act in a manner that shows no bias towards or against any position being discussed. A person closely identified with a particular position that will be examined by the jury should not be a member of the project staff. However, such a person may serve on the Advisory Committee or working group, or may participate as a witness presenter.

Project Director

The project director is ultimately responsible for the execution of the Citizens Jury project. (S)he participates in the Advisory Committee and is the liaison between the project staff, the Advisory Committee, the sponsor, and any other involved entities. It is the responsibility of the project director to delegate tasks as appropriate. Depending on the experience and skills of the project director, as well as on the complexity of the issue and project, the role of project director can range from half-time to full-time for 3-6 months.

If there are more than one experienced and skilled staff members, it is advisable to appoint one to be the project director and the other(s) as project associates. However, if it is necessary to appoint co-directors, it is advisable that specific roles be assigned to each individual director to ensure that all areas of responsibility are covered while avoiding unnecessary duplication of efforts.

Duties of project staff

Generally speaking, there are many areas of responsibility for the project staff. Within each of these areas, there are many specific tasks, which may vary from project to project, depending on the objectives, issue, sponsor, etc...

Once the pre-planning steps are completed (structure, staff, scope, timeline, budget, and sponsorship), the project staff is responsible for the executing the following elements of any Citizens Jury project:

- Advisory Committee
- Jury selection, including survey
- Establishing the charge
- Developing the agenda
- Identifying, selecting, recruiting & preparing witnesses
- Logistical issues
- Moderator training
- Managing the hearings

- Wrap-up, follow-up, and evaluation
- Media and publicity (coordinate with sponsor)

It is important to point out that these steps are not necessarily chronological, as many elements may need attention simultaneously.

Chapter 6

TIMELINE

There are many elements which will impact a project's timeline. The elements that will likely have the greatest impact are the complexity and contentiousness of the issue. The more complex and contentious the issue, the longer the timeline will need to be. However, a Citizens Jury project should not take more than 4-5 months to plan, once funding is secured. Below are two different generic timelines – with two different structures. Both timelines begin AFTER a contract or agreement has been signed, and assumes that funding has already been secured.

This first timeline divides the planning into two separate phases, with most of the planning occurring in Phase One. At the beginning of Phase Two, the charge, agenda, and witness list are mostly developed. Therefore, Phase Two consists primarily of jury selection, witness recruitment, finalization of plans, and implementation of the planning decisions from Phase One.

The primary advantage of this structure is that the project sponsor is given an opportunity to evaluate the progress of the project prior to the initiation of the survey (which is a significant direct cost). If the sponsor does not feel comfortable with the charge, agenda and witness list, they may choose to terminate the project at this point or to extend the overall timeline to allow for more time for initial planning. This is a more cautious approach that may appeal to certain sponsors and may be more appropriate for certain issues. However, Phase One is quite intensive and will require a significant amount of work for the project staff with frequent Advisory Committee meetings.

PHASE ONE	
Week 1	Establish Working Group
Week 1-2	Select Advisory Committee
Week 1 - 8	Consult with Working Group
Week 4	1st Advisory Committee Meeting ; begin to develop preliminary charge, agenda, witness list
Week 6	2nd Advisory Committee Meeting Charge, agenda, witness list development
Week 6 – 9	Design Phone Survey
Week 7	3rd Advisory Committee Meeting discuss preliminary charge, agenda, witness list
Week 9	4th Advisory Committee Meeting Finalize preliminary charge, agenda, witness list
Week 9	Sponsor reviews project progress
PHASE TWO	
Week 10	Purchase random phone numbers
Week 11-12	Conduct phone survey Mailing to survey respondents

Week 11-13	Set jury targets Meet with moderators
Week 14	Select jurors
Week 10 - 19	Finalize charge, agenda, witness list Recruit and prepare witnesses
Week 10 - 19	Additional Advisory Committee Meetings, if necessary
Week 10 -19	Consult with Working Group
Week 10 - 19	Finalize logistics -- site, food, etc.
Week 16 -18	Prepare juror and staff handbooks
Week 18	Confirm all jurors, witnesses and logistics
Week 19	Jury Hearings Friday: Issue Initial Report
Week 22	Issue Final Report

The second generic timeline has the planning elements (charge, agenda, witness list) occurring concurrently as jury selection (including survey & mailings) and logistical arrangements, rather than in two distinct phases. The primary advantage of this approach is that the total time, from beginning to end, is reduced, relative to the previous timeline. The primary disadvantage of this approach is that if problems or major disagreements arise, there is less flexibility (in terms of time) to address and resolve them, since potential jurors will have already been contacted with the hearing date. Another disadvantage is that, under this structure, the project staff will be juggling a greater number of tasks at any given time.

Week 0	Receive Project Approval
Weeks 1 -18	Consult with sponsor on Design Elements
Week 1	Select Advisory Committee
Week 2	Design telephone survey Develop jury selection targets Develop preliminary charge ideas
Week 3	Purchase random telephone numbers Select site
Weeks 4 - 14	Consult with Advisory Committee
Week 5	Telephone Survey Mailing to survey respondents
Week 6	Develop preliminary charge, agenda, witness list Finalize site
Week 7	Charge, agenda development
Week 8	Select Jury Charge, agenda development Meet with moderators
Week 9	Charge, agenda development Recruit witnesses
Week 10	Charge, agenda development

	Recruit witnesses
Week 11	Charge, agenda development
Week 12	Finalize charge, agenda, witness list Recruit witnesses
Week 13	Confirm and prepare witnesses
Week 14	Confirm jurors Confirm logistical details Prepare juror and staff handbooks
Week 15	JURY HEARINGS Fri: Issue Initial Report
Weeks 16 - 17	Prepare Final Report
Week 18	Final Report Delivered

In setting a Citizens Jury timeline, two of the most important items to schedule are the telephone survey and jury selection.

The telephone survey should occur approximately 3 weeks before jury selection, in order to provide sufficient time for survey respondents to reply to follow-up inquiries, but not so long after the survey that the respondents will forget about the initial contact. The jury should be selected 4-8 weeks before the jury hearings to allow selected members to make appropriate arrangements.

Development of the charge and agenda typically take anywhere from 6-10 weeks, and witness list development and witness recruitment can take anywhere from 3-8 weeks. The charge and agenda are typically developed together. Once the charge and agenda are generally agreed upon, then the witness list can be discussed and witness recruitment can begin.

If the issue is exceptionally complex and/or if there is a lot of contention among the stakeholders, then additional time should be built into the 'planning elements' such as charge and agenda development.

From the Jefferson Center's experience, once funding has been secured, a Citizens Jury project should take no less than 8 weeks, and no more than 5 months, to plan and execute. Write-up of the final report as well as follow-up activities can take additional time.

Chapter 7

SCOPE

The scope is a clear statement about the depth and breadth of the issue(s) that the jury will explore. It is essential that there be understanding and agreement on the scope of the jury's work among the sponsor and project staff.

Since the jury is convened for a limited amount of time, there is a limited amount of information that can be presented. The jury will not be able to dive deeply into every single related sub-issue. Every project will be a trade-off between depth and breadth. It is helpful to consider the following saying when thinking about the scope (and limitations) of a Citizens Jury project: "Either an inch deep and a mile wide, or a mile deep and an inch wide!"

In other words, the jury can either focus on a few aspects (or even one aspect) of the given issue and have the time to learn about that aspect in-depth, or the jury can learn a little bit about many relevant aspects of the issue. It is truly a trade-off. The more in-depth the jury goes, the fewer topics they can address.

The decision about the scope is often based on the sponsor's needs and desires, but it is essential for everyone involved in the project to understand that there are limitations. Do not be tempted to bite off more than you can chew. It is better to make a tough decision up-front to limit the scope of the project than to think that you can fit it all in.

Careful consideration, discussion, and agreement on the appropriate scope for the jury will not also make the project manageable, but will also enable the jury to produce solid results.

Chapter 8

SPONSORSHIP

The sponsor is the entity (or entities) responsible for **funding** the project. A Citizens Jury project can be sponsored by a non-profit organization, university, corporations, government agency, media entity, individual, or a combination of these. The sponsor may or may not be the same as the ‘decision-maker’ or the ‘recipient’ of the recommendations. In addition, the sponsor may or may not be the same as the project staff.

If the sponsor and the ‘decision-maker’ are distinct entities, it is important to involve both entities in the pre-planning discussions about scope and agenda to ensure buy-in and support of the project. If the decision-maker is not involved in the project, there is significant risk that the project will not have an impact. Keep in mind that there may be other organizations or agencies *supporting* the project, besides the sponsor and/or the decision-maker. In this manual however, the sponsor refers to the funding body.

The sponsor must understand and accept the premise of the Citizens Jury as well as the associated benefits and risks. If the sponsor is the decision-making body, or any body that is perceived to have a particular position on the issue, it will be critical to establish appropriate rules of communication between project staff and the sponsor in order to ensure that the project maintains objectivity and balance, and that the sponsor does not have undue influence on the content of the project, despite their funding.

The sponsor can (and often should) play a key role in defining the scope of the project. However, it must be clear to the sponsor that, in the interest of the project, the project staff will make final decisions.

It is essential the funding be secured before significant expenses are incurred (see budget section). Experience has proven that it is extremely inadvisable to be planning a Citizens Jury project while simultaneously working to secure funding for the project. Doing so opens the project staff up to a host of difficult situations that should be avoided. It can also jeopardize the legitimacy, and even the very existence of the project. In addition, experience has shown that ‘enthusiasm’ about the concept of a Citizens Jury is quite a different thing from providing funding. This point cannot be underscored enough.

Chapter 9

BUDGET

As alluded to in the Chapter 8 (Sponsorship), finances can pose one of the greatest challenges in carrying out a Citizens Jury project. Raising the necessary money and then allocating it appropriately is one of the biggest jobs that the project director faces.

A preliminary budget is developed in the very early stages. This preliminary budget may undergo significant changes as the scope of the project takes shape, but it is important to start with some best-estimate figures.

There are several factors which influence the budget, including:

- Geographic area covered
- Scope
- Level of contentiousness and complexity
- Institutional support
- Many others

The size of geographic area covered by the project tends to influence the direct costs of the project, including travel (for jurors, witnesses & staff), lodging, and telephone survey. Most of the other factors tend to influence the indirect costs of the project, namely staff time. The Jefferson Center recommends the use of paid staff whenever possible, although volunteers can be an important supplement during the hearing days. Strong institutional support, including in-kind contributions such as materials, telephone, postage, and staff time can greatly reduce the bottom-line outlay of cash needed to conduct a project.

There are ways to reduce the cost of a Citizens Jury project (e.g., using a door-to-door survey instead of a telephone survey, utilizing volunteer staff, etc...), but it is important to understand that these cost-savings may result in a sacrifice in overall quality of the project. It is advisable to think carefully whether a cost-saving move is worthwhile in the long run.

Below are two *generic* budgets to help guide planners in the development of a budget specific to their project. (Costs are from 2002 and may have changed.)

NATIONAL CITIZENS JURY -- TYPICAL COSTS

US\$1,500	Purchase Random Phone Numbers
18,000	Phone Survey (1000 surveys)
2,000	Photocopying, Telephone, Postage
1,000	Report Printing
12,600	Juror Stipends (18 jurors x \$700)
5,940	Meals, Food for Jurors (18 x \$60 x 5.5 days)
16,200	Lodging for Jurors (18 x \$150 x 6 days)
7,200	Travel for Jurors (12 x \$500) + (6 x \$200)
900	Staff Meals, Food (3 x \$50 x 6 days)

2,700	Staff Lodging (3 x \$150 x 6 days)
3,000	Staff Travel (6 roundtrips x \$500)
8,000	Moderators (2 x \$4000 for stipend, travel, food, lodging)
3,500	Site Costs
28,000	Project Staff Time
\$110,540	TOTAL

The above budget assumes an 18-person jury drawn from across the nation, with all jurors and staff needing medium or long distance travel and lodging. This budget contains neither travel reimbursement nor compensation for witnesses.

LOCAL CITIZENS JURY -- TYPICAL COSTS

\$1,500	Purchase Random Phone Numbers
16,000	Phone Survey (1000 surveys)
800	Photocopying, Telephone, Postage
700	Report Printing
9,150	Juror Stipends (18 jurors x \$500 plus 3 alternates x \$50))
2,875	Lunches, Snacks, Coffee for Jurors, Staff (23 x \$25 x 5)
5,000	Moderators (2 x \$2500 for stipend)
25,000	Project Staff Time
\$61,025	TOTAL

The above budget assumes an 18-person jury drawn from one area. Assumes no travel, lodging or site costs.

Staff time is the single most significant cost of a Citizens Jury project. The amount of staff time needed depends on many factors, including experience, competence, contentiousness of the issue, length of the project, etc. Below are two possible arrangements of staff time requirements based on Jefferson Center staffing. One scenario is for a complex Citizens Jury and the other for a less complex project. Both projects are based on a 15-week total project planning timeline. The time allocations represent an average value, even though time allocation is unlikely to be evenly distributed throughout the project. For example, the office manager may be very involved with data management of the survey (more than 10% time), but then have several weeks with minimal involvement. The 10% figure represents an estimate of the average value.

SIMPLE

Project Director	15 weeks @ 70% time	420 hours + 40 (for jury week)
Project Associate	7 weeks @ 30%	84 + 40
Executive Director	7 weeks @ 25%	70 + 40
Office Manager	7 weeks @ 10%	28 + 40
TOTAL		762 hours

COMPLEX

Project Director	15 weeks @ 100%	600 + 40
Project Associate	15 weeks @ 100%	600 + 40
Executive Director	15 weeks @ 50%	300 + 40
Office Manager	15 weeks @ 40%	240 + 40
TOTAL		1900 hours

Note: The figures above are estimates of required staff time, based on past projects of the Jefferson Center. Some Citizens Jury projects have been successfully implemented using fewer hours, and some have required more.

Chapter 10

ADVISORY COMMITTEE

The Advisory Committee (AC) is composed of individuals knowledgeable about the issues at hand. Their role is to ensure that project staff are aware of and understand the different perspectives and the relevant issues to ensure that an appropriate charge, agenda and witness list can be developed. There are two main types of Advisory Committees that the Jefferson Center has utilized, although alternate structures may work as well.

One type of Advisory Committee involves ‘wise and thoughtful’ individuals. In other words, they understand the issues, but are not necessarily the stakeholders or advocates directly involved with the issue at hand. The other type of Advisory Committee directly involves the stakeholders or advocates as members of the AC.

There are advantages and disadvantages to each type of AC composition. For example, a ‘wise’ committee may be easier to manage, and may have less conflict, but the project may not receive the same level of support from the stakeholders if they are not directly involved in the planning and development of the project. On the other hand, an ‘advocate’ committee may involve grandstanding, positioning, and clashes (all of which are generally unproductive towards the planning of the project), but the project may have a greater impact if all perspectives are directly involved and included in the process.

Either way, it is important to make sure that all significant perspectives are represented at the table. If not, the charge, agenda, and witness list may end up being biased. Representatives from the sponsor and the decision-maker should be members of the advisory committee. Significant effort should be made to keep the Advisory Committee to a manageable size (less than 15), while ensuring adequate representation of the various perspectives.

Ideally, the Advisory Committee will actually meet several times throughout the project to discuss the elements of the project. However, e-mail, websites, and teleconferencing can allow for ‘virtual’ Advisory Committee meetings, if necessary. In addition, occasional consultation with individual Advisory Committee members (face-to-face, e-mail, telephone) may also be useful to project staff. This may be necessary if the AC meetings are unproductive due to politicking or grandstanding of members.

Another possible way to work with an Advisory Committee is to email AC members with draft materials (charge, agenda, witness list) and ask for their advice and comment via email or phone. Although this mode of operation loses the productive give and take generated by live group meetings, it does provide a very convenient way for AC members to assist the project. If AC members include all other members in their response, the entire committee is able to see everyone’s comments.

Before assembling the Advisory Committee, the timeline and scope should be generally agreed upon by the sponsor and project staff, although revisions may occur as planning progresses. The Jefferson Center strongly recommends that funding also be secured prior to assembling the Advisory Committee. At the first Advisory Committee meeting, significant time should be devoted to explaining the Citizens Jury process and clearly defining the role of the Advisory Committee. It is essential that members understand that their role is to assist and advise the project staff in developing the charge, agenda, and witness list so as to reflect the relevant issues and varying perspectives in a balanced and objective manner. The Advisory Committee is also on alert for bias in the project and the planning process.

Advisory Committee meetings are generally facilitated by project staff. These meetings should be viewed as (1) an opportunity to gather input and ideas about the charge, agenda, and witness list; and (2) an opportunity to build and maintain support for the project from a range of perspectives. It is difficult, but essential, to maintain support from the various perspectives and stakeholder in the *process*. AC members may disagree with the recommendations and conclusions of the jury, but they should be able to agree that the process was conducted in a balanced and objective manner. If the issue at hand is extremely contentious, the timeline should be longer and more staff time should be committed to the advisory committee planning process to ensure that all perspectives feel comfortable about the project as it progresses through the planning process.

The Advisory Committee will primarily provide input on the charge, agenda, and witness list. They may provide input on the telephone survey, jury demographics, media outreach, and other matters as well.

Chapter 11

JURY SELECTION

The Citizens Jury process distinguishes itself from other methods of citizen input to public policy, such as opinion polls and focus groups, by selecting jury panels that are representative of the population in key demographic criteria. This difference from the start is supplemented by thorough education of the jurors and thoughtful deliberation to reach conclusions.

This chapter looks at how to define the jury demographic targets and then explains the procedures for jury selection.

Definition of population and demographic variables

A Citizens Jury is designed to be a microcosm of the population covered by the project. Jurors need to be chosen, therefore, so that the final jury looks like a small version of that population in all important ways. The jurors are matched to some broad statistically-measurable characteristics of the community relevant to the project. The JC has to date almost exclusively used adults over the age of 18 as jurors but this isn't necessarily a requirement.

The first step in jury selection is to make a clear definition of the population to be included in the project. This population may be as narrow as a sub-section of a community (e.g., persons residing in a small geographic area) or as wide as an entire community, Congressional District, state, or even country. The population definition is determined by the scope and purpose of the project.

The second step is a decision on the specific demographic variables on which to base the jury selection. In other words, what characteristics of the population need to be reflected accurately on the jury in order to make it a microcosm of the public. The usual demographic variables used are age, educational attainment, gender, geographic location within the community, and race. Usually, a sixth variable is added. This can be an additional demographic characteristic, such as tax paying status for the 2000 Property Tax Reform project or health insurance status and provider for the 1993 Health Care project. Or it can be an attitudinal question, such as an opinion about deregulation of electric utilities for the 1997 Energy Future project. Clearly, six variables will not capture all of the different dimensions of a populations. However, it can be challenging to balance the six variables and additional ones will make it harder. Project staff, along with sponsors and advisory committee, should weigh carefully the usefulness of each of the variables.

Additional sub-targets can also be utilized if project staff determine that additional variables are necessary to ensure the final jury reflects the population appropriately for the issue at hand. In selecting the jury, the project staff tries to meet these subtargets, but first makes sure to do their best to satisfy the initial six targets. The final make up the jury will reflect, or nearly reflect, the actual percentage of the populations that fall into the sub-target categories.

Research on demographic criteria

In order to establish targets for each variable, research must be done to collect the existing figures. The website for the US Census (www.census.gov) will have the US decennial census materials and other documents necessary for finding the percentages for most variables. This, while important to the scientific rigor of the jury selection process, is not very difficult to do. State and local planning agencies are a good source of data in-between decennial census takings. Use the most recent data that can be found. Targets do not necessarily have to be developed from a single source. Other reputable surveys, as well as the survey for the Citizens Jury project, can also be used as sources of data (as long as the populations match and there has been no targeted calling done). Keep the source information used in developing the targets for inclusion in reports.

Each variable is broken down into appropriate categories (e.g. gender is divided in male and female, geographic location is divided into counties, or into urban, suburban rural, etc.). Try to maintain a balance between breaking variable into too many categories and grouping together so much that it loses meaning. A good rule of thumb is to aim for 3-5 categories per variable. More categories lead to more ‘boxes’ on the grid, and make it more difficult to satisfy all the targets.

Age is always a key variable. The Jefferson Center typically groups categories together to create three age classes: 18-34, 34-54, and 55 and older. Most projects deal with adults, and the above categories can be used. If younger persons are also involved, there will need to be some additional research to define those numbers. In doing the survey, the respondents will be categorized in the above groups and the ultimate goal will be a good match on all the age categories.

Education is used as a demographic category because of its good correlation with income, which most people are reluctant to divulge, and because it is a reasonably standard way to create portraits of a group. Educational attainment figures are available through the census. In some projects, a “less education” category has included anyone with less than a high school education or a high school graduate. “More education” is some college, college graduate, or higher. Technical school courses beyond high school are also included in the “more education” category. Recently, the Jefferson Center has used three educational categories: high school or less, some college or technical school, and four-year college graduate or more.

Gender percentages are available in the census data. They are usually close enough to 50-50 that juries have equal numbers of men and women, unless a project is working with a specific population that is not reflective of the norm.

Geographic location is a means of obtaining the jurors from the various regions or areas covered by the project. If both an urban center and its surrounding suburbs are included in the scope of a Citizens Jury, for example, where a person lives may be important to the problem under consideration. The jurors chosen should be

representative of the populations of those two differing areas. In a statewide jury, various regions should be proportionally represented. Census materials or state/local planning agencies will probably provide the information necessary here.

Race percentages are also available through census materials. Careful consideration needs to be given to the definition of race for the project. In most cases, it may be sufficient to specify white and non-white percentages. In others, a more detailed breakdown is necessary, so percentages will be needed for white, African-American, Hispanic, and Asian, and other populations. In recent censuses, Hispanic or Latino identity is considered an ethnic rather than racial category. People who identify themselves as Hispanic or Latino may be any race or combination of races. The Jefferson Center typically defines 'Non-white' to include black/African-American, Asian/Pacific Islander, American Indian, or "some other race." This grouping also includes those who consider themselves to be of more than one race. Individuals who consider themselves white/Caucasian and Hispanic are included in the white only category.

In most projects, it has been useful to err on the side of diversity. Additionally, projection can be utilized as well, especially if the focus of the jury is on the future. For example, in the 1996 *State and Local Fiscal Matters* project, race data was taken as projected out to 2005, to better reflect the diversity of Minnesota in the future (where the topic of the jury was most focused).

Other variables specific to the topic of a particular jury may require some additional specialized research. Information on commuting habits, health insurance providers, welfare experience, or other topics will be available through surveys done by state agencies or academic researchers.

Attitudinal questions can be matched either to recent survey data by independent sources or to the percentages revealed in the phone survey itself. Remember, there will be more people answering the first couple of issue questions than there will be people in the jury pool. (See the next section on the survey questionnaire.)

Once the research to find the figures is completed, target percentages will be established for each of the variables on which the jury is to be balanced. Below is a typical chart for a project.

Jury Targets for 2002 Citizens Jury on Global Climate Change			
Demographic Category	Actual % in 6-state region	6-state area target	Final Jury Make-up
Gender – Male	47.6%	9	9
Gender – Female	52.4%	9	9
Age – 18-34	30.0%	5	4
Age – 35-54	40.1%	7	8
Age – 55+	29.9%	6	6
Education – H.S. or less	50.5%	9	7
Education – Associate degree or Some college	23.2%	4	5
Education – College graduate	26.3%	5	6
Race – White only (Hispanic or non-Hispanic)	77.2%	14	14
Race – Non-white or multi-racial (Hispanic or non-Hispanic)	22.8%	4	4
Geographic Location – “Urban”	24.8%	5	5
Geographic Location – “Suburban”	57.0%	10	10
Geographic Location – “Rural”	18.2%	3	3
Attitude – Democrat	47.7%	8	8
Attitude – Republican	36.0%	7	7
Attitude – Other/Independent	16.3%	3	3

The final column shows the actual jury after the project is over and is inserted into reports to show how the jury was balanced.

SURVEY

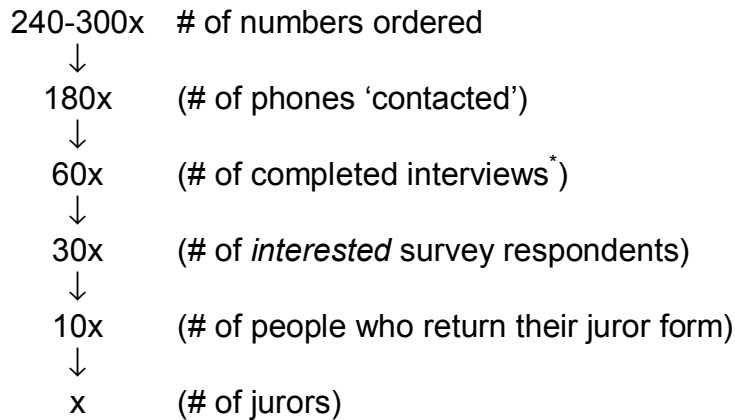
Choice of Method

Use of a random survey to form the jury pool is an essential part of a Citizens Jury. Identifying potential jurors on a random basis establishes credibility for the project. In most projects the survey starts with the purchase of randomly generated telephone numbers from a reputable survey company such as Survey Sampling, Inc. (One Post Road Fairfield, CT. Tel. 203-255-4200). Using telephone exchanges that are known to be largely residential, the company generates the last four digits of these numbers randomly. Numbers can also be purchased “cleaned” which means that most businesses and dead-ends have been screened out. This, of course, costs more.

Many decisions will need to be made, including the following:

1. How many numbers will be needed? Numbers needed will vary according to the method planned for contacting jurors. If you are working with a professional survey company for the initial calling, they will have a good idea of how many numbers will be needed. However, consideration must be given to all steps of the process where

potential jurors might drop out. The following schematic has been developed by the Jefferson Center for use as a general guideline, based on recent experience.



In other words, for a project with 18 final jurors, you strive to complete approximately 1,000 interviews and therefore should order 4,300 – 5,400 random telephone numbers. This assumes a survey with no screening levels. If you are screening, then more numbers will need to be ordered. Once you know how many completed surveys you want, the survey company can advise you about the total number of numbers to order. This schematic also assumes that 30% of interested survey respondents return their juror form. If you suspect that the return rate might be lower (e.g., less 'glamorous' issue), then you might want to increase your goal for completed surveys.

This acceptance rate has dropped markedly since the Citizens Jury process was first conducted. In 1990 we were able to obtain 72 jurors in a large project using six juries of 12 people each, based upon 770 completed interviews. This means that the acceptance rate at that time was six times as high as in recent projects. This decreasing acceptance rate necessitates larger and more expensive phone surveys. One option is to reach potential jurors by going door to door. The Jefferson Center has done this successfully by randomly selecting locales within a community and then randomly selecting households within each locale. More about this option can be learned by contacting Ned Crosby through the Jefferson Center Web site.

2. What area should they encompass? Survey Sampling can generate numbers by county or based on a radius from a designated ZIP code. If your target population spills over county or radius lines, then you will need to order extra numbers to ensure that those individuals have a chance of being called. This means that you may have to screen out individuals and therefore, may have to order extra numbers. If the project is of small size or geographic area, you can the local telephone directory and establish a random procedure for choosing numbers, such as the first number on every third page.

Whatever the method chosen, there must be strict adherence to the agreed-upon procedures, with no deviation that might skew the results.

* This assumes a survey with no screening levels.

Survey Questionnaire

Whether the method of approaching individuals is over the telephone or in person, a questionnaire will be required. This is the means to collect the necessary demographic information about potential jurors. The questionnaire will need to — in a very short time — set a tone that will interest potential participants enough to make them agree to receive more information and consider being in the jury pool. It will also need to establish the credibility of the project, often by naming the key sponsor.

To grab the interest of persons who receive these calls, the questionnaire should ask their opinion on some issue questions concerning the project topic. The key is to involve the respondents in a way that makes them willing to listen to the project description later in the call. A project on finance or budgets could seek the respondents' views on the state's fiscal picture. In some cases, the responses can actually be used in making decisions about the project, such as identifying which issues to cover.

Once the quick survey on issues has been done, the questionnaire should give a very brief description of the project, including its sponsor and goal, what kind of time commitment is required, and any payment being offered to jurors. The respondent should then be asked if they would consider participating in the project. If they say yes, additional questions should be asked to establish their demographic details, and they should be told that more information will be sent out immediately.

See sample survey questionnaire.

Survey calling procedures

The actual calls for the random survey can be done in several ways, depending on the time available, budget constraints, and the purpose of the project:

- by a professional survey company;
- by callers hired for this purpose;
- by students;
- by volunteers supporting the sponsoring organization;
- in special cases, students have been used as well (e.g., the 1998 Citizens Jury on Physician Assisted Suicide, which was conducted in coordination with a college class at St. Olaf College).

Callers must be reliable in committing time to the project and must be able to keep accurate records of their calls on the sheets provided. Ideally they should have pleasant voices and sound enthusiastic on the phone.

Training materials must be developed for the callers, and training sessions will let them practice for different situations that may develop. It is important for the survey callers to understand the purpose of the project so as to be able to portray it accurately when answering questions from respondents. They will not need to, and should not, give

many details because they can tell respondents that additional materials will be sent. Callers do need to be aware of the general project overview. Supervision can be provided during the calling in case the caller cannot handle a question and to make sure materials are available etc. It is often useful for project staff to be present on the first night of calling.

If calling is done by a survey company, they will use their own facilities. If callers are hired by the project, a phone bank will be needed. If the sponsor is a nonprofit organization, it may be possible to get a real estate company, travel agency, or other corporation to donate the use of its phone bank for the nights needed for calling. In return, the project would mention the company as a contributor in publicity.

Women tend to answer the telephone more than men. In order to reach a balanced sample of men and women, callers start their conversation by asking to speak to the person in the household who is 18 or older and has celebrated the most recent birthday. This “birthday question” can give a random age and gender response group.

Callers then read from the printed questionnaire, filling out a respondent’s answers on it, or an answer sheet, as they go. Professional survey firms will program the survey into callers’ computers and responses will be entered directly in the computer. At the end of each call, callers record the outcome on sheets prepared for that purpose, indicating successful completions, refusals, no answers, callbacks, busy signals, disconnected numbers, answering machines, businesses, and terminations. If the telephone numbers have been purchased from a survey sampling company, recording sheets will be provided. If not, it will be necessary to design something similar. The survey sampling sheets provide spaces for callback opportunities. Callers need to be told how many times to re-try a busy number or answering machine.

We have found, that where and when possible, calling Monday through Thursday in the evenings, and Saturday afternoons yields the greatest results.

Tracking potential jurors after the initial call

In order to keep track of the survey calls, to produce forms for tracking, and to generate letters to potential jurors, a computer with a database and print merge capability will be needed. The set-up can be very simple. This will allow the jury data to be stored in one place and manipulated in a number of ways. The Jefferson Center currently uses Microsoft Access and mail merges with MS Word to produce the follow-up mailings.

Procedures after each day of telephone calling

After the data from the completed questionnaires have been entered into the data base, a letter should be produced for each potential juror identified through phone calls that day. A control number should be assigned to each survey respondent. The control number will be used as the identification of the potential juror until the final selection is established. This helps to protect the selection process against bias.

Using a database program like Microsoft Access, produce a report containing the relevant data for each survey respondent who answered “might” or “probably” to the interest question. This report will be used to assign each potential juror to a box on a selection grid that corresponds to their set of characteristics. All interested survey respondents are plotted on the grid, regardless of whether or not the juror form is returned. If the form is returned, the corresponding control number is circled on the grid so that staff can differentiate between those who actually returned the form and those who indicated interest in the survey, but didn’t return the form.

See sample juror selection grids.

The control number is put in the appropriate grid box. These big grids should be written legibly enough that when jurors’ commitment forms return to the Center, their control numbers can be highlighted or circled. The Jefferson Center typically produces the grids in Microsoft Excel and uses a commercial copy shop to enlarge them to 2-3 feet high and 5-10 feet long, depending on the number of categories.

If, after sufficient time for the mail to go out and come back, it seems that significant parts of the grid are not receiving responses, follow-up calling can be done. At this point, the calling is usually done by project staff (as opposed to students or the survey company).

Initial materials sent to those considering participation

The day after the initial phone contact, a packet of materials should be sent to those survey respondents who indicated interest by answering “might” or “probably” to the interest question.

Packet for Potential Jurors

- cover letter explaining the project
- form to fill out and return
- small stamped envelope for returning the form
- fact sheet on the project

See sample letters to interested survey respondents (i.e., potential jurors)

Keeping track of results

As juror forms are returned, the corresponding control number should be circled (or otherwise clearly marked) on the juror selection grid. The control number is written on the juror form, and the forms are put in a three-ring binder.

If there is a shortage of jurors in certain demographic categories, additional telephone calls may need to be made. If there is any uncertainty about shortages, the calls should be made anyway, to allow enough time for returning the forms.

Selection of Jurors and Alternates

The primary objective in selecting jurors is to satisfy the demographic and other “targets” already established (see pages 23 – 25). There will be a pool of people in each category who are willing and ready to participate. Staff will then need to choose the jurors and alternates needed for the right balance in each category and notify them that they’ve been chosen as jurors or alternates. We have found it helpful to have two or three staffers individually select juries from the control numbers and the grids and then compare and pick the best. Often there are only a few juries that can be selected that match the targets.

Final selection of a balanced jury is often a difficult process. Certain categories are absolutely essential to balance: race and gender are immediately visible and important. On others such as age, education, or geographic location, it may be acceptable to be slightly out of balance. A jury can rarely satisfy all six or seven categories completely. Decisions concerning major imbalance, however, should be discussed with the Steering Committee or the Executive Director.

When selecting jurors, strive for diversity within each variable, in addition to satisfying the targets. For example, you would want to make sure that the ‘college or more’ jurors are balanced among gender. And you would want an even distribution of ages among the ‘high school or less’ jurors. And so on.

It is best to fill the more difficult categories (any where there are smaller numbers of potential jurors) first, then to add jurors from the easier ones. Choosing a jury is similar to doing a crossword puzzle: pieces gradually fit into place. The Jefferson Center usually designs a jury selection form with appropriate spaces for each category. The staff member(s) selecting the juror will want to make lots of note on this form to ensure the diversity within categories discussed above.

When selecting jurors from the grid, there are sometimes several highlighted numbers in a single box. You need to develop a way to decide which number you will choose. Sometimes, more specific information about potential jurors than what appears on the grid is helpful. For example, since the age categories span 15-20 years, it is sometimes useful to refer to the Juror Information Form when selecting between two potential juror numbers located in the same box to ensure there is a spread along the entire span of the age category. Other times, you just need to select one at random. Frequently when the Jefferson Center is confronted with such a situation we will handle it in the following manner. The first time we select from a multi-number box, we select the first highlighted number. The second time, we select the second highlighted number, and so on.

If you are trying to decide between two different ‘boxes’ on the grid, it is often a good idea to select the box that has more than one highlighted number (i.e. representing a returned juror form) if it is at all possible. That way, if the selected person is unable or unwilling to participate in the project, there is an ‘identical’ back-up person. In other

words, there is a perfect substitute (in terms of jury targets) if the originally selected individual says no.

The Jefferson Center usually selects the jurors first, and waits until they have all been contacted and confirmed before selecting alternates. Alternates are needed in case a juror does not turn up on the first day. Alternates should be asked to come the first morning and wait until 10 AM or so. If a juror needs to be replaced, the closest replacement alternate will be seated as a juror. If all the jurors have arrived by 10 AM, the alternates will be dismissed. It is usually unwise to seat a juror arriving after 10 AM as they will have missed too much of the jury's program.

Alternates are typically paid \$50-\$100 if they are dismissed. If they are seated, they receive the same stipend as an original juror. The Jefferson Center recommends selecting three alternates for 18-24 person projects and two for 12 person projects.

Notification of Jurors and Alternates

A phone call to the jurors and alternates who have been chosen should be made 4-8 weeks before the jury hearings. One or more follow-up calls between the time of selection and the introductory day are recommended, plus a formal letter acknowledging their selection and providing detailed information. It is advisable to call the jurors the week before the project as well.

A sample information packet to a selected and confirmed juror includes:

- Letter
- Juror expectations sheet
- Maps, if necessary
- Lodging/Parking/Special Needs Information Form, if necessary
- Stamped return envelope, if necessary

See sample confirmation letters to jurors and alternates.

See sample expectation sheet for jurors and alternates.

A letter of thanks should be sent to those potential jurors who have not been selected for the Citizens Jury. This letter can be sent once the selected jurors and alternates have all been contacted and confirmed. This letter should also tell them when and where to look for information about the jury.

See sample thank you to potential jurors letter.

As soon as the jury panel is complete, a listing of the jurors' names, hometowns, occupations, and ages can be drawn up for use in reports. If last minute changes are made, the list must be up-dated and kept current. The juror list is typically not released until the first day of the jury, to prevent any pre-jury lobbying or in case last-minute changes are made.

Chapter 12

ESTABLISHING THE CHARGE

The charge is arguably the most important element of the entire project. The charge will guide the agenda, the witness selection, the deliberations, and the form of the recommendations.

Writing the charge takes skill and effort. The charge must be clearly written and focused, but cannot bias or lead the jurors toward any particular answer. The charge defines the scope of the project, so it must be written in such a way to present a manageable task to the jury.

It is often most productive to have the project staff draft a preliminary charge after consultation with the sponsors. This draft can then be revised and refined after further consultation with sponsors, partners, and advisory committee members. It is the responsibility of the project director to ensure that the charge is worded in such a way as to meet the needs of the sponsors, be unbiased, be focused, and allow for useful recommendations to be developed in response to the charge.

The charge questions can be separate and distinct questions, or they can be a series of linked questions that build on one another. Ideally, there should not be more than three charge questions, including sub-questions, but sometimes more questions are necessary.

The wording of the charge is critical. Below is a listing of charges from some past Citizens Jury projects.

Examples of past Citizens Jury charges:

Global Climate Change, 2002

1. What potential impacts of global climate change (positive or negative) are most notable or of most concern?
2. Is it likely or unlikely that global climate change will have significant impacts for humans and/or natural systems?
3. In your opinion, what steps, if any, should be taken to address climate change?

Metro Solid Waste, 2001

1. What are the values, in order of priority, that should be reflected in a solid waste management strategy for the metropolitan area?
2. Given those prioritized values, what is the preferred solid waste management strategy for the metropolitan area?
3. To implement the preferred strategy, what tools should be used and what (if any) actions should be taken by government or others?

Minnesota Property Tax Reform, August 1999

1. What role should the property tax play in financing local governments?

2. What should be done to improve the property tax system? (i.e. how can the property tax be a “better tax?”)

Chatfield Public Schools, September 1999

1. What are the prioritized facility needs facing the Chatfield Public School District now and in the next 15 years?
2. Given those prioritized needs, what actions should the District take?

Physician-Assisted Suicide, April 1998

1. How should Minnesotans respond to the recent Supreme Court ruling that urges Americans to engage in an “earnest and profound debate” about physician-assisted suicide?
2. If and when the legislature takes up physician-assisted suicide, should current Minnesota State law be changed?
 - If yes, what should those changes be and why?
 - If no, why not?
3. If and when physician-assisted suicide comes before the Minnesota State Legislature, how should legislators examine the issue?
 - How do you recommend legislators examine the issue so as to avoid the potential divisiveness?
 - What issues, if any, must be included when examining any proposed legislation regarding physician-assisted suicide?

Orono Public Schools, April 1998

1. What are the impacts of the District’s Open Enrollment policy?
 - What approach should the District take concerning Open Enrollment?
 - What would the impact of that approach be?
2. What are the prioritized needs of the School District over the next ten to fifteen years? Consider various types of needs, including but not limited to, needs driven by state mandates, safety needs, communication needs, educational needs, space needs, and technology.
3. Regarding needs that require facility changes, what are the best solutions? What are the financial implications of those solutions? What changes are essential and must be made as soon as possible?
4. Regarding needs that do not require facility changes, what are the best solutions? What are the financial implications of those solutions?

Dakota County’s Comprehensive Plan, November 1997

1. What community/personal values are most enhanced or are most at-risk by the projected growth in Dakota county in the next 20 years?
2. What aspects of living in Dakota County are important to keep and promote in light of projected growth?
3. What should be included in the Comprehensive Plan? Specifically, what actions should the County take in the areas of transportation, the environment, and parks/open space?

Minnesota's Electricity Future, April 1997

1. Using your values and the information presented to you, identify and prioritize those attributes you think are most important in designing an electricity system.
2. Select one of four plans that most closely reflects your values and the attributes you identified as important for a future electricity system. Having selected one of the plans, you may suggest modifications to that plan.

Chapter 13

DEVELOPING THE AGENDA

Since key components of a Citizens Jury project are the thorough education of the jurors and the opportunity for thoughtful deliberation, careful attention needs to be paid to the structure of the agenda for the introductory, hearing, and deliberation days. The agenda is based on a variety of factors, including the project goals and scope, charge, issues to be addressed, and the number of days available.

Considerations in Agenda Setting

Setting the agenda for a Citizens Jury project requires care and thoughtful balance. In this section some of the general matters that should be considered in writing the agenda will be presented.

In the education process of the jurors, there must be enough information presented to enable them to have a good grasp of the issue at hand, but not an overdose of information. The information must come from several different points of view. Enough time should be provided for jurors to discuss what they are learning, for them to have their questions answered, and for them to deliberate and reach conclusions by the final day.

The hearings are organized to utilize expert witnesses or presenters. An early agenda decision concerns the form of presentation of the material by witnesses. It is important to understand when to make use of 'background' or 'factual' information, and when to utilize advocates to present specific views or arguments. Staff need to consult with relevant advisors to get good witnesses who are competent in the field and who will be able to answer jurors' questions about the issues.

Another decision requiring careful consideration is whether or not to send any issue materials to jurors in advance of the hearings. The Jefferson Center does not send issue related educational materials out to jurors. Our concern has been that some jurors will be intimidated by the materials and may choose to not participate in the jury. While some jurors might appreciate the opportunity to read materials early, others will not read items in advance. Consequently, the jury will arrive on day one of the hearings with dramatically different levels of knowledge regarding the issue to be examined.

Agenda overview

The goal of a Citizens Jury project is to inform and educate the jurors, a microcosm of the public, to enable them to reach wise and thoughtful conclusions, which they will share with the public. The agenda must therefore provide them with a structure that enables them to learn everything they feel is necessary to reach good decisions on the charge which has been assigned to them.

The staff and relevant advisors must work to design an agenda framework which divides the information sessions into logical steps in acquiring the education needed. A good example is the 2000 Citizens Jury on Metro Solid Waste. After an introductory

morning, the jurors heard some overview background information, followed by an exercise to identify their values related to the issue. The second day presented more specific background information, followed by a day of competing visions/options for the future presented by advocates. The final day and a half were devoted to deliberations. It is useful to read past reports on projects to see the breadth and diversity of agendas possible.

Whatever the topic, the information should flow easily from an orientation to the Citizens Jury process to a general introduction to the material and from there into the details of the issue, allowing enough time along the way for the jurors to understand how their own backgrounds or values may be influencing their interpretation. Allowing time for the jurors to tell their own stories related to the topic, especially when it is something that they have all experienced, such as health care, education, or traffic congestion, is important in giving them ownership of the subject and the process.

Introductory Day

On the first day there are a number of housekeeping details that will be necessary to address. The morning of the first day is usually devoted primarily to orientation of the jurors to the process and each other. From the start, it is important to focus on the importance of the jurors as the central players in the project and to build this notion in their minds. Time should be allowed for the jurors to introduce themselves to each other. Staff will then want to review the background of the Citizens Jury process, explain the details of the current project in which the jurors are participants, and distribute guidelines and rules of procedure.

See examples of Guidelines for Conducting a Citizens Jury and Rules of Procedure.

In recent years, the Jefferson Center has developed a question, or series of questions, for the jurors to answer in the juror introduction section. In addition to stating their name and where they live (and perhaps what they do for a living), the moderators pose a question for each juror to answer. The project staff, including the moderators, give great consideration to the question. Ideally, the questions should be something that is not too personal (to avoid embarrassing someone or making someone feel shy), something that is not too controversial, but something that will provide a bit of unique information about each individual. Examples from recent projects include:

- Tell us about a child in your life (for a school related project).
- Tell us the best thing that has happened to you in the past week.
- Tell us why you were interested in participating in this project.

Often times, the question(s) get the jurors all thinking that they are while they are individuals, they are also members of the same community.

It will also be important to encourage the jurors to learn about each other through discussion of their own experiences concerning the issues they will investigate further with expert witnesses. This is an important step both in getting biases on the table and having them start the process of becoming a group by working beyond individual points

of view. The moderators' role will be very important here to keep a positive tone and to encourage the participation of all members of the group. The point is not to start the substantive discussions now, but rather to let the jurors tell their stories and start the conversation.

If the process will involve many decisions made by voting, jury members should be introduced to the voting process early on so that they are comfortable with it.

Hearing Days

The next days are dedicated to the education of the jurors through the presentations and questioning of expert witnesses. The amount of time dedicated to this can vary.

In some Citizens Jury projects, advocates for each “side” of an issue (usually Advisory Committee members) select their own witnesses to present and argue for their point of view. The advantage of this method is that jurors hear consistent cases pro and con from start to finish. The similarity to a real jury is apparent. The disadvantage is the adversarial nature that this approach builds into the process and the reliance that the jurors must place on the advocates for the choice of witnesses and presentations. The personality or style of the advocate may become an issue.

If the jury concerns a highly political issue with clearly opposing sides, it may be that the advocate system is necessary. If not, however, it may be more productive to let the jurors sort out the issue without being directed by advocates, assisted instead by experts carefully chosen by staff. This latter system also frees the witnesses to speak their minds freely because they are not limited to one point of view.

In either case, it will be necessary to begin the hearings with some background factual information regarding the issue, including overviews of various points of view and of the witnesses that will present later. It is essential to make sure that the jurors (and the witnesses) understand which presenters are background, and which are advocates.

It is often very useful to utilize panels when a number of different perspectives on the same issue are presented. One structure would be to give each perspective a set amount of time for a presentation, followed by clarifying questions for that particular presenter. After all the perspectives have been presented, have a panel with each presenter as a member of the panel. The jury can then ask questions to several members of the panel at the same time. This panel structure helps to illustrate the areas of agreement and the areas of disagreement between the various perspectives.

The agenda should be constructed so as to allow the jurors to discuss and deliberate all throughout the week. Some of the discussion in the early parts of the hearings will be to assist the jurors in ‘processing’ the information they hear. Other times, the discussion will actually be initial deliberations where the jurors may develop preliminary recommendations, such as ranking options or prioritizing values.

See the sample agendas.

If the charge to the jurors is divided into stages, it may be that the jurors will deliberate and reach certain conclusions after each of these sections. This is helpful in getting the jurors accustomed to the idea of working through the process of reaching agreement. In the 1996 State Budget project, and others, the jurors did reach tentative conclusions after the end of each section.

Staff should be alert to the possibility of providing aids to help jurors sort through the information they are hearing, such as color-coded sheets to take notes on different sections of the charge. The 1996 *Citizens Jury on Comparing Environmental Risks*, used color-coded information and scoring sheets to help the jurors track information. Scoring sheets and voting forms can be developed on the fly by the staff as the hearings progress, if necessary. The staff must be flexible to provide materials for the jurors, as they request or develop the ideas. However, the staff, including the moderators, should discuss tentative plans for voting, scoring, or evaluation steps of the deliberations and prepare materials ahead of time as best as possible (while being open to changes).

During the hearing days, staff need to monitor the comfort level of the jurors with the agenda. It may be necessary to adjust the agenda. Jurors may want less time in formal presentations from the experts and more time to ask questions. Jurors tend to become more talkative as the process goes on, too, so that a question period that is long enough the first day may be too short on the third day. Moderating style plays a key role here.

Ideally, however, the agenda should be defined in advance, laid out in clear time blocks, and remain unchanged. Last minute changes confuse staff, witnesses, jurors, and the media. Also, if the proceedings are being aired on radio or television, listener-friendliness and timing are factors to consider before changes are made.

The Jefferson Center has found it very useful to hold a staff meeting at the end of every day of the hearings. People in attendance include project staff, moderators, and sometimes representatives of the sponsoring body or partnering organizations. Meetings should be run by the project director and can be used to discuss the day, the next day, and any things which may have come up during the hearings.

Deliberations

The final stage, which may be a day or longer, is for jurors to deliberate in order to answer the charge. Staff need to be thinking about and planning this day right from the beginning, because it is always a challenge. Jurors have to work through considerable material and discussion in order to reach their conclusions; they never feel there is enough time to do this satisfactorily.

It is at this point that a clear charge to the jury will be a great advantage because it frames the deliberation discussions and will lead to clear decisions, either by vote or consensus. Whatever the charge, the moderators should have an understanding of the

kind of decisions the jurors must reach and a strategy on how they can best get there. Moderators need to take a very active role in moving the discussion along to cover all the necessary points.

Different kinds of deliberation strategies are needed for different juries. If the jury charge is a fairly straightforward vote or decision, such as a recommendation for or against river boat gambling, the deliberations should probably be done with the group as a whole. If the goal of the jury is to design a specific welfare reform plan or agree on detailed language concerning an issue, however, it may be better to divide the job into pieces and break the jurors into small groups to work on different sections. The groups then can report back to the whole. Then the jurors must discuss the results as a large group to hammer out an agreement. Ideally, the work of the small groups in this case can be typed up and brought back to the group as a whole so that everyone has the proposed language in front of them as they discuss it. Once the jurors reach consensus (or take a final vote), no matter in which kind of deliberations, their conclusions should be typed up and brought back to them again so that they can review their final product to make sure that what they have said genuinely reflects their thoughts.

The Jefferson Center does not attribute any words to the jurors that they themselves have not explicitly approved. This means that everything that is to be attributed to them must be written and approved on the final day. It has worked well to have a staff member and a laptop computer present at deliberations and then quickly print and copy the recommendations so the group as a whole can examine them.

Sometimes the jurors are adamant that they want to discuss an issue outside the framework of their original charge. The first order of business must still be to produce answers to the original charge on which the jury was constituted. The decision to allow discussion beyond this must be made by the project staff. Probably it will be apparent during the hearing days that such a request will be coming, so that the decision on whether to allow it can be discussed in advance. In such decisions, the fact that the jurors are in charge of the process must be balanced by the fact that the jury framework has been set up to reflect the original charge. Also, a Citizens Jury should not be allowed to reach conclusions on an issue if they have not heard testimony pertaining to the issue.

In answering a charge question, it is necessary to provide background information on how the jury arrived at a specific recommendation, especially if the charge question is framed as a 'yes' or 'no' type question. This background information may consist of rankings of the various options, votes on the various proposals presented, pro/con evaluations of the options, etc. This background information is often the most useful piece to the sponsors and stakeholders because it provides the justification for the recommendation. A simple 'yes' or 'no' will not suffice.

The above deliberation guidelines are rather strict. Throughout the course of the week, experienced moderators and staff team can foster a strong sense of independence and purpose in the jury and so there need not be such a rigid format to the deliberations. In

fact, it may be that the less the staff has to do at this point, provided the jurors are responding to the charge, the better. Clearly, certain juries can coalesce around certain topics and in other cases it doesn't work. Adjust the deliberations' structure accordingly.

Deliberations and News Conference

The final day of the jury is for finalizing deliberations, reaching conclusions on the charge, and presenting the initial report to the media and the public. This is the most hectic of all the days and needs the most staff. Media often come for a final news conference and materials have to be generated quickly. Careful attention should be paid to the needs of the media when planning the timing for the news conference, if one is being held. Holding the news conference in time for the reporters to file their story for the evening news or to do a live feed report during the evening news is critical in getting the best coverage.

After the jurors have concluded their work and before the news conference, the staff should distribute to the jurors an evaluation form and allow time for them to complete it. Some of the evaluation results will be reported in the final report, while others are for research and future planning purposes. (See chapter 10) Those that are to be reported in the immediate report must be tallied by staff as soon as the jurors have finished them.

The initial version of the public report of the jurors findings and recommendations is distributed at the news conference. This is the ideal time to hand it out because media will be present.

Preparing the jurors for the final news conference will help the process go smoothly. The jurors should vote on two spokespersons who will present the work of the jury to the media and public, usually one male and one female. The format and the spokespersons role for the news conference should be thoroughly explained to the jurors. Briefing the jurors on questions the reporters may ask can help get the information out clearly and quickly, avoiding misinformation.

Jurors should all have a copy of the initial project report in hand before the news conference.

Chapter 14

EXPERT WITNESSES

Expert witnesses include all those persons who aid the jurors in understanding the issues central to the charge to the jury, from the neutral resource persons who introduce them to the vocabulary and history of the topic to the experts who either discuss all the options or advocate for one point of view.

Definition of the role

The role of the expert witnesses is to help jurors understand all aspects of the topics included in the charge to the jury. Because the topics may be ones that the jurors have not thought about before, witnesses need to be able to explain the complexities in language that average citizens can understand. In most projects, the witnesses will give brief presentations that sketch out their perspective but at least half the scheduled time will be devoted to juror questions.

Neutral resource persons/presenters

Neutral resource persons can play a role in all Citizens Jury projects. Their role is to make the jurors comfortable with the vocabulary of complex topics, to explain the history behind a current problem, and sometimes to lay out — in a nonpartisan or unbiased manner — possible options for solutions to the problem.

Sometimes these witnesses participate only at the beginning of a project, to set the stage for advocates who will argue different points of view before the jurors. This model was followed in the 1993 Citizens Jury on Health Care Reform project, in the 1997 Citizens Jury on Minnesota's Energy Future. In other projects, the entire hearings are built on panels of neutral resource persons, who discuss and evaluate all the options before the jurors, without the use of advocates for a particular point of view. The 1994 Pennsylvania Gubernatorial Citizens Jury project is an example. And the 1996 State and Local Fiscal Matters project mostly followed the same model (4 advocates, 14 neutral presenters).

In some projects, a neutral resource person is hired as a staff expert who will stay with the jurors for the entire project, to help them with questions they may have as the other witnesses, mostly advocates, go through their presentations. The Center has had mixed experiences with the “neutral expert.” In some cases it has worked very well (1993 and 1996 budget projects) and in others not so well. It can be very difficult finding an expert who can avoid biasing the jury towards or away from a particular side or outcome. Consider the need for this sort of expert very carefully, if there is an appropriate person available, and how the jurors might use or abuse the resource.

Options for advocate witness selection

Beyond the neutral background witnesses, there are different strategies that can be used to select the advocate witnesses. Depending on the jury subject and the input of the Advisory Committee, the advocate witnesses may be chosen in one of several ways:

- Advocates are selected to present each competing point of view in an adversarial context, as in the 1993 Citizens Jury on Health Care Reform and the 1998 Citizens Jury on Orono Public Schools. The advocates choose their own witnesses for the panels that consider different aspects of the problem. In this scenario, there is usually a neutral resource person chosen to orient the jurors or be an advisor to them.
- Project staff choose a balanced group of experts, making sure to find witnesses to represent both (or all) sides of the issue or to choose individuals who can discuss all sides. There are two models within this method:
 - Separate experts present specific positions that they favor, as in the 1994 Citizens Jury on Welfare Reform, the 2000 Citizens Jury on Metro Solid Waste, and the 2001 Citizens Jury on Global Climate Change;
 - Panels of experts, both academics and practitioners, discuss all sides of the issues, as in the 1994 Pennsylvania Gubernatorial Citizens Jury project or the 1995 Carleton and St. Olaf Citizens Jury on Hog Farming.

Review of Witness Criteria

In the planning stages, the Advisory Committee may adopt criteria for selecting expert witnesses. This is particularly important in juries where partisanship will be an issue and staff need to know whether witnesses are supporting a particular position. There may also be criteria to be considered concerning witnesses, such as employment for an organization that will stand to gain financially from a particular solution to the problem, or their ability to present well.

The Advisory Committee should also decide whether to make an explicit attempt to include diversity as a criterion for witness panels. In some projects, informal targets have been set for women and minority witnesses. Reasons to have a diverse panel include credibility:

- for the jury panel, which is itself diverse;
- for the public and policy makers who view or listen to the proceedings; and
- for the media who report on it.

In the case of the advocacy method of presentation of witnesses, it will be important to choose advocates of equal status and ability for both (or all) sides, so that the jurors are not swayed more by the advocate's talent or personality than by the facts and ideas presented.

Points of view that need to be presented

Staff should brainstorm on their own and with others to define at an early stage the full range of existing points of view on the topic under consideration by the jury. It is important to be very clear about the scope of the jury topic and to get the widest expression of possible viewpoints. Whether the project is using the advocacy method of

presentation or the balanced panels of witnesses, the full range of views needs to be represented, so that no criticism of bias can be valid.

The Advisory Committee and the sponsoring organization should also contribute significantly to this discussion.

Formation of lists

Once key decisions are made about the agenda and the types of witness presentations, project staff need to start forming lists of possible witnesses for each witness ‘slot,’ including neutral resource persons, advocates, and experts. Advice can be sought from many sources, in addition to the sponsors and Advisory Committee members, such as:

- academics at a variety of universities
- professionals or policy makers in the field
- legislators and legislative staff
- relevant private and governmental agencies
- think tanks or institutes
- business leaders - chamber of commerce
- interest groups or lobbyists
- journalists
- the League of Women Voters and the American Association of University Women for women in the field
- NAACP or Urban League contacts for minority/persons of color

Certain names will start to stand out as they are recommended by more than one source. At this point, it is important to identify the perspective of the possible experts so that it is clear which viewpoint they represent or whether they could speak for all viewpoints on a neutral panel. It doesn't hurt to be direct and just ask.

Recruitment of specific individuals

Generally, it will be best to make an initial contact by telephone with a possible witness. In this initial phone call, you can present the project and determine whether the person is interested and available. The recruiter should offer a concise description of the project and an accurate explanation of the role of the witnesses. If criteria have been set by the Advisory Committee, these should be mentioned in the conversation. The availability of the witness on any of the hearing dates should also be ascertained. Sometimes panels may be switched from one day to another if key witnesses are not available, so it is better to check on all the dates up front. If the person is interested, a cover letter with follow-up materials should be sent immediately. This can also be done in the complete reverse: fax or letter first, then phone call, then date checking.

Sometimes staff need to contact more witnesses than will actually be needed in order to have enough from which to draw a balanced panel and to ensure that they can all come on the day chosen. Other times, only those witnesses needed are contacted.

Usually, it is sufficient to have project staff member contact potential witnesses. However, if the project is being conducted in an area unfamiliar with the Citizens Jury

process, or if the witness is a very prominent individual, it may be advisable to have someone act as a ‘door opener’ for a project staff member. For example, if a member of the Advisory Committee or working group personally (or professionally) knows a potential witness, it may be advisable to have that individual contact the potential witness first to introduce the project and ascertain their level of interest. Sometimes, it is sufficient to simply mention that “so and so suggested I call you” while other times, it is necessary to have the Advisory Committee member contact the potential witness directly. The project staff, Advisory Committee, and working group should work together to develop the best strategy for recruiting witness presenters. Be sure to **ask permission** to use someone’s name (e.g. AC member) in recruiting a witness before you do so.

Materials to send to witnesses

Potential witnesses need to receive enough information to understand their role in the Citizens Jury process. This should include a cover letter with accompanying project information. In some cases, witnesses may be asked to send back to the staff information about themselves that can be used in introducing them and/or providing background to the media, such as their backgrounds (brief summary) and/or a brief position statement. It may also be useful to have a good long conversation with witnesses. The more they know about the project, the better their presentation will be, and the happier they will be with the project.

Be sure to include the specific time and date for the witness’s presentation, as well as to emphasize the time limit. This letter should ask about the audio/visual presentation needs of the witness, and offer up the options and/or limitations in this regard. The Jefferson Center has found it useful to include witness guidelines in the initial information packet as well. See *Witness Guidelines*.

The Jefferson Center’s policy is to ask that the witnesses prepare 30 copies of any materials they want to use, including paper copies of the overheads or slides that they use in their presentation. If a 3-hole binder is used for the jurors, it is extremely useful to ask that the witnesses pre-punch their handouts.

In some cases, witnesses are asked to develop a one-page summary of their position or to respond to specific questions. This is especially useful if there are several advocates presenting differing views on similar issues. This provides a simple way for jurors to compare and contrast different perspectives, if each one completes a similar form. It is advisable to request that the witnesses furnish these forms to the project staff prior to the hearings so that (1) the staff can make copies ahead of time, as well as (2) to review the content of the material to ensure that the witness is addressing their ‘assigned’ material. It is most simple if you can e-mail blank forms to the witnesses so that each one looks the same.

See sample letter and forms for expert witnesses.

Selection

Once a final selection decision has been made, any experts who are not needed or who were not available on the appropriate day should be contacted first by phone and then by letter to thank them for their consideration. For those witnesses who are selected, detailed information should be sent about time, location of hearings, vouchers or plane reservations for travel, and any hotel accommodations that will be provided, if that material was not sent in the initial packet of information. They should receive a list of other witnesses, a specific description of their role, an outline of the information that should be covered, charge to the jury, and the final agenda. This information can be sent over e-mail or regular mail.

Confirmation

About a week prior to the hearings, the project director should contact all witnesses to confirm their participation, remind them about the details, answer any questions, nudge them to return information and forms if they haven't, and to check on audio visual needs. This contact should be over the telephone, if at all possible.

Follow-up

Often times, witnesses are given an evaluation form after the sessions in which they participate. When utilized, we usually send it to them after the project and ask that they send or fax it in. Their opinions on how their part of the process went are valuable. Following the jury, thank-you notes should be sent to all witnesses who participated. A copy of the final report should be sent at that time if it is ready or at a later date if it is not.

Chapter 15

LOGISTICAL ISSUES

Site Choice

One of the tasks of the project staff is to coordinate the site. The staff member(s) appointed as 'site coordinator' has the responsibility for finding the meeting location, handling all the site details during the event, and making hotel reservations for jurors, staff, and witnesses as needed and within the budget. It is often helpful to have a separate person assigned this responsibility. Negotiating with hotels and conference centers for group rates can be a time consuming process. Finding and booking a meeting site should be done as soon as dates have been decided during the planning stage. The locations with the best rates are the first to be booked, and getting four or five days in a row can be a challenge.

The meeting room should be large enough to accommodate a U-shaped table set up to seat the jurors comfortably, along with space for observers and staff. The room should have space for jurors to split up into four or five small groups, or the site should have smaller rooms available for this purpose. The moderator and witnesses will sit or stand at the open end of the U-shape and at least two flip charts on easels will be needed. Space to hang the flip-chart sheets is also needed for easy referral by the jurors.

The meeting room should have windows and be a pleasant enough space that you (and the jurors) would be willing to spend an entire week in it! You should be able to hang things on the wall with tape, pins or post-it type papers. There should be sufficient space in front of the U for a projector screen, a podium (for individual speakers), a table (for panels), and any other items that might be necessary to be presented in front of all the jury members.

A registration table is needed either just outside the meeting room or just inside. The staff often needs a work room or space close by to set up with computers, copier, fax, and phone lines. If there is not a copier in the building that can be utilized by project staff, it is essential to locate the nearest copy center. Ideally, there should be one within walking distance (or quick driving) so that copies can be made quickly.

Bathroom and telephone facilities should also be nearby to the meeting room. Ideally there should be easy access to the building (including handicapped accessibility) for jurors, staff, other participants, and media.

Attention should also be paid to space for media needs, if that is a component of the project, i.e. camera room and table for reporters. A check should be done to ensure that the site has enough electrical power to accommodate the electronic media, especially if videotaping is planned. If an audience is expected, chairs should be set up in an unobtrusive location behind the jurors so that the audience will not be a distraction.

Food

Food will have to be provided for all staff members and all jurors. The sponsor (i.e. funder) can decide whether or not they are willing to provide the extra funding necessary to provide food for witnesses, media, observers, etc. At a minimum, the following must be provided for the jurors and the staff:

In the morning, upon arrival:

- Breakfast rolls, donuts, bagels or something similar
- Coffee, regular and decaf
- Juice

The leftovers from this can be used for the morning break as well.

Lunch: A full lunch (see more below)

Afternoon snack:

- Cookies, Fruit, Bars, or something similar
- Sodas
- Juice

Providing meals through catering services or through the regular food services of the site add considerably to the cost of the event, but will probably be cheaper and faster than going to a separate location. Some of the highest expenses in the budget are for coffee and snacks during the agenda breaks. Project staff should supply accurate counts for each meal.

If the site that you choose has a cafeteria, one option is to make arrangements to give jurors ‘coupons’ or allowances to use in the cafeteria for lunches. This is often a nice option because it allows jurors to choose whatever they want to eat. Ideally, this can be coordinated with the staff at the site to open a temporary account at the cafeteria and have each juror ‘charge’ their lunch meal to the account. If that doesn’t work out, another option would be to give each juror a set amount of cash at the beginning of each lunch period.

If there is not a cafeteria, then lunches should be pre-arranged with a caterer or other food provider. The jurors will be working hard, and will need a good solid lunch. So, this is not a place to skimp. If necessary, vegetarian options should be available. Ideally, there should be a place to eat lunch that is different than the meeting room in order to give the jurors a break from that space. In the past, the Jefferson Center has done everything from catering lunch buffets to box lunches to party subs to pizza.

The food for the afternoon breaks should be delivered approximately 15-30 minutes before the break. This allows for some flexibility in the timing of the break. For example, sometimes it is necessary to break early because the presentations have been very intense or taxing. If the break food has been delivered, it is easier to take a break earlier than scheduled.

The food for lunches and break should vary from day-to-day and include some healthy options such as fruit and juice.

Pitchers of ice water should be provided on the jurors' table, and should be refreshed at each break. There should be one pitcher for every 2-3 jurors, and fresh cups daily or at every break.

Parking

Ideally, there should be very convenient parking. Depending on the hearing location, sometimes arrangements for parking need to be made. Often times, a contract can be made with a nearby parking ramp to pre-pay the parking costs for jurors and witnesses.

Audio Visual

Many presenters will want to use PowerPoint for their presentations. This will require you to have a LCD projector, screen, and laptop. Many convention centers and hotels will have these available for rental, but they can be expensive. Some locations include the use of these items with the rental of a room. It pays to check it out before you sign a contract because some places charge up to \$250 a day to rent a projector.

A microphone system should also be arranged. Depending on the size of the space, the number of possible observers, and the media needs, it may or may not be necessary to have microphones for the jurors. Some Citizens Jury projects have had individual microphones for every juror, and sometimes jurors have shared microphones. It is advisable to have microphones available for all the witness presenters.

Hotels

In some cases, it will be necessary to provide lodging for the jurors, if they are coming from a large geographic area. If so, arrangements should be made far ahead of time. Most hotels will offer a group rate if you reserve several rooms at one time. In addition, it is worthwhile to ask if the hotel will offer a better rate since you will be renting rooms for several consecutive days. Ask to speak with the hotel sales staff or the manager to negotiate the best rate possible.

Lodging Information Forms can be sent to the jurors to gather all the necessary information to make the reservation. These forms can confirm the day/time of arrival and departure, as well as ask about smoking preferences, etc... It is customary to give each juror their own room and not to request that they share a room with another juror. Often, it is no more expensive to allow the juror to bring a guest. This is a nice thing to offer them. For example, if a juror wants to bring their spouse or a friend, it is often relatively simple to accommodate that request.

Arrangements should be made to have the rooms billed directly to the project, if at all possible, rather than reimbursing the jurors. This will prevent the jurors from having to pay the costs up-front (which can be significant). However, if such arrangements are made, you should make it clear what costs will be covered by the project and what costs will not be covered. Most hotels will allow you to divide up the costs like this. For

example, the project may pay for the room, but telephone calls and room service are the responsibility of the individual jurors.

Sometimes, it is necessary to provide lodging for witnesses as well. Similar guidelines apply to providing lodging for witnesses as for jurors.

Travel

If jurors are coming from a large geographic area, it may be necessary to provide funds to cover their travel costs. There are several different ways to do this.

Driving/Mileage Reimbursement

It is reasonable to expect jurors to drive up to 200-250 miles for the project. Any farther than this, and flight arrangements should be made. If jurors are driving farther than 50 miles or so, it is reasonable to reimburse them based on a standard mileage rate. This can be provided ahead of time, or reimburse them once they arrive. To determine the total amount, simply determine the mileage between their hometown and the meeting site (you can do this on the web with driving direction sites such as mapquest.com), and then double it to get the round trip mileage. To figure out a fair reimbursement rate, you can check with various other organizations to see what the 'going rate' for travel reimbursement is.

Air Travel

In some projects, it is necessary to make flight arrangements to transport the jurors to the meeting site. These arrangements should be made far in advance to get the best possible fare. The project should be billed directly for these expenses rather than asking the jurors to bear these costs, even if they will be reimbursed. (It may be necessary to get a credit card for the project or the organization to use for just such expenses.) If flight arrangements are necessary, the project staff should work closely with each juror to make sure that all the necessary information is gathered and communicated clearly and in a timely fashion. Arrangements should also be made to transport the jurors from the airport to the hotel, or to have a staff person meet them at the airport.

Witness Travel

Generally speaking, witnesses are not paid. However, it is often necessary to cover their expenses in order to get them to agree to participate in the project. Careful consideration should be given to this when selecting witnesses. If the same expertise and legitimacy can be provided by a local witness, serious consideration should be given to selecting the local witness. However, there will be cases where the best choice for a witness is located geographically distant to the project site. In such cases, expenses should be negotiated with the individual witnesses. Many times, it is possible to reimburse the witness for all or a portion of their expenses rather than paying for them up-front. However, there are cases where witness expenses need to be paid up-front. This can be negotiated on an individual basis with each witness.

Stipend

The jurors receive a stipend for their participation in the project as jurors. The typical amount is \$100 a day, but in some areas of the country a higher amount may be necessary. The stipend is intended to help defray some costs and to be an incentive to 'encourage' participation, since some jurors will have to take vacation days or pay for child care. The jurors receive the stipend on the final day of the hearings.

On the final day, usually Friday, the project staff must bring checks for the full stipend amount to the hearings. Each juror receives a check. Typically, the jurors receive their check when they turn in the evaluation form on the final day. This ensures that you receive an evaluation form from every juror.

In most cases, the stipend amount is less than the IRS requirement for 'reportable income' but it is the responsibility of the project staff to check into the state, local and federal requirements for this and provide the appropriate documentation and forms if necessary.

Alternates who are dismissed on the first morning typically receive a small stipend for showing up. Usually it is somewhere between \$50 and \$100 for making themselves available. Therefore, the project director should have checks made out for this amount for each alternate on the first day of the hearings. If an alternate is seated, then he/she would receive the full juror stipend amount at the end of the week. If an alternate is dismissed, they receive the smaller stipend amount.

In some cases, it is necessary to cut more checks than will be used, especially if the checks have to be cut before the week begins. In that case, unused checks are voided and returned to the bookkeeper/accountant. It is always advisable to have a couple of extra checks on hand, and an authorized signer available, just in case.

Juror Binder

A binder for each juror should be prepared before the start of the hearings. Typically, a sturdy three-ring binder should be used, with divider inserts to divide the contents into sections. Depending on the organization of the agenda, there can be anywhere from 3 to 8 sections in the binder. The first section should contain background information, including a project overview, description of the Citizens Jury process, list of participants (jurors), charge, current agenda, witness list, rules of procedure, and any other general background information. There should be spaces for jurors to insert witness handouts and notes, organized according to the agenda. Each binder should have at least 10 pages of blank paper that can be used for notes.

Typically, a label with the juror's name should be placed on the outside of the binder so that people can tell who the binder belongs to without looking inside. Jurors are allowed to bring the binder home with them at night if they wish, but project staff should underscore the importance of bringing the binder back with them each morning.

Without the binder, they will not have the information to refer to throughout discussions and deliberations.

Fresh pencils and pens should be supplied to jurors at the beginning of the week.

Staff Binder

Staff members also receive binders similar to the jurors' binders, except that additional information may be included in these binders. There should be a telephone list for all relevant people – staff, jurors, witnesses, caterers, etc. There should also be a list of logistical details that are useful for staff to know. For example, the type of food and delivery time for each break should be included in the staff binders.

Public Information Materials

A table should be set in a convenient, yet unobtrusive location to lay out public information materials. This may include additional press packets, as well as information for observers and the general public. Items to be placed on this table include:

- Project Overview
- Description of sponsoring organization(s) and coordinating organization
- Charge
- Agenda
- Witness list
- Juror list
- Extra copies of witness handouts
- Sign up sheet for final report, including address

The Jefferson Center has often put together public display binders as well. Usually, two extra binders are prepared that contain all of the same information as the jurors binders. One copy of each witness handout is put into the binder. This is useful because observers can look at the binders and get a sense of the information that the jurors have received, even if the observer hasn't been at the hearings every day. Also, you often run out of extra copies of the witness handouts, and the binders are a resource that contains all the handouts. At the end of the project, it is often nice to give one of the binders to the sponsor, and to keep one of the binders for the project archive.

Chapter 16

HEARINGS - LOGISTICS

Staffing Needs

Volunteers or extra paid staff during the hearing days are usually needed to host the witnesses, staff the registration table, keep the media happy, run errands, and time witness presentations. On the last day, the extra staff are needed to enter the information in the computer and to print, copy, and collate the jury findings in short order.

Often, an extra staff person or volunteer should be assigned the responsibility of timing all witness presentations. This person should be very clear about the time allotted for each presentation, and the time allotted for questions. This person should be pointed out to each witness. The timer should have signs that clearly have times printed on them large enough so that witnesses can clearly read them from the front presentation area. Witnesses should be told that the time on the signs reflects the *time remaining* in their presentation, and should be aware that the moderators will cut them off if they go over their allotted time.

Jurors

The logistical plans to get the jurors to the hearing site should be thought out carefully. Some jurors may be arriving by plane or other ticketed transportation that must be arranged well in advance to get the best rates. If plane reservations are made, the tickets should be sent at least a week in advance with explicit directions on what to do--getting to the airport two hours before departure, etc. This may be the first time some jurors have flown. These jurors should then be met at the airport by staff and directed to the transportation for the hearing site or hotel. Other jurors may be driving and should be sent detailed maps of where to go, where to park, and whom to contact if there is a problem. All transportation needs should be paid for by the project and the driving jurors should be told to keep track of the mileage and get receipts for tolls and parking for reimbursement.

Jurors should be treated like VIPs. When the jurors arrive on the first day, they are often anxious. Since they were randomly selected, it is unlikely that they will know anyone other than the project director or other staff person who has been talking to them on the phone. Every attempt should be made to help them feel welcome and comfortable. Jurors should have some kind of identification like a name tag as well as a “tent card” to mark their place at the jury tables. They should sign in upon arrival at the site and be directed to their assigned seats where there will be information and briefing materials. Drinks and light food should also be available and noted to the jurors.

Expert Witnesses and Special Guests

Expert witnesses and special guests will be arriving at various points throughout the hearing days. A staff person should be assigned to be on the lookout for these individuals and welcome them. They may have materials that will need to be distributed

to the jurors, special audio-visual needs and may prefer a podium to sitting at a table. Some experts like to walk around during their presentation and may need a lavalier type of microphone. These are all issues that the staff should be aware of ahead of time and should check that they are in place.

Provision for Media

For most juries, extensive work should have already been done to encourage media to attend. Last minute follow-up calls to targeted media with special angles or hooks should be made all through the hearing days to keep them informed of the expert witnesses attending, the jurors progress and concerns, and highlights of the discussions.

When media do come to the site, they should be welcomed and given the media briefing materials. It is helpful to have all media sign in at the registration table when they arrive to keep track of who was there. The project director/public relations coordinator should talk directly with all reporters and offer any insights that would assist the reporter in writing a story. Reporters should be shown to the reserved media table and told where to plug into the audio for taping of segments.

In some projects, a news release should be faxed to the media at the end of each day, capturing the essence of the days activities. In others, the news releases will be less frequent.

Sample Contents of Media Briefing Packet

- Agenda
- Project contact person and phone numbers
- Philosophy of the Citizens Jury
- Guidelines for conducting the Citizens Jury
- Project overview sheet
- Revised schedule
- Jury selection explanation
- Juror list
- Reporting information
- Expert witness panel lists
- Advisory Committee list
- Sponsoring organization Information
- Funders list
- Other information on the issues to be discussed
- Commentary (past jurors and/or media comments)

Staff Briefing

Taking a few minutes at end of each hearing day for a brief staff meeting will be time well spent. Staff can review what went well and where any difficulties occurred. It is also a good time to draw the volunteers and newer staff into the discussions and get fresh opinions and reactions to the proceedings. Short meetings in the morning may

also be helpful to review the days agenda and discuss any likely problem areas. These meetings, however, should be brief and focused.

On some days, the end-of-the-day staff meeting can be a bit longer to plan out the discussion sections for the next day. It is not necessary for all staff members to be at these planning meetings, but the moderators and the primary staff members should be there to discuss the day and plan for the upcoming day.

Final Details of Last Afternoon

Arrangements can be made at the close of the last hearing day for jurors to be interviewed. Sometimes hometown media want to talk to the jurors by phone and telephone lines should be made available for that purpose. At the close of the Citizens Jury hearing days, staff might be working hard to make copies of the report available to the reporters attending the news conference and preparing envelopes for distribution to media outlets. Runners should deliver the information as quickly as possible to local media who are not at the news conference.

At the end of most Citizens Jury projects, the Jefferson Center or the project's sponsor has usually provided cake and punch for the jurors. This is a nice opportunity to again thank the jurors for their hard work.

Arrangements for the jurors to get to the airport or other transportation home should be explained in detail.

Chapter 17

Wrap-Up, Follow-Up, and Evaluation

Evaluation by the jurors and others is a key feature of Citizens Jury projects. Those who are the critical participants must have the opportunity to state their satisfaction level with the project, evaluate the various parts, and rate the staff on how successful they were in conducting the project in an unbiased way.

Jurors Evaluation

From the beginning, Citizens Jury projects have asked jurors to complete an evaluation of their project as one of their final activities on the last day of working together. The results of this evaluation have been included in the public report and news conference announcing the results of the project. A standard form has evolved over a number of projects. It seems to work well and allows useful comparison between projects. It is modified according to the specific format of each project, but three basic questions remain the same, with the answer choices for all being *very satisfied*, *satisfied*, *neutral*, *dissatisfied*, *very dissatisfied*: Jurors are not required to sign their names on the evaluation form.

Standard Evaluation Questions

- In general, how do you feel about the Citizens Jury on _____ now that you have completed the project?
- How do you feel about the different parts of the project? (The parts are spelled out individually--introductory day, witness panels, etc.)
- One of our aims is to have the project staff conduct the project in an unbiased way. How satisfied are you with their performance in this regard?

In addition to the above evaluations, which form part of the final report, staff often wish to ask jurors to answer other questions, as an aid in understanding how the participants felt the project went and in suggesting things that could be improved or changed for the next project. These questions and answers are not for public use. Examples of the questions that staff may want to ask in this second level of evaluation are as follows:

Second-level Evaluation Questions

- How do you feel about the performance of the personnel (project directors, moderators, etc.)? Any comments that you wish to make concerning the staff?
- How do you feel about the timing of various aspects of the project (witness sections, deliberations, etc.) Did you have enough time to do the job properly?
- Was there any part of the project that was particularly satisfying or well done?
- Was there any part of the project that was particularly dissatisfying or poorly done?
- Would you recommend any changes in the proceedings?
- Are there any additional comments that you would like to make?

These comments help the staff and the Jefferson Center as they conduct their evaluation of the projects success.

See sample evaluation forms for jurors.

The jurors are also encouraged to write comments of up to 100 words on any aspect of the project that they wish. These comments, which must be signed, are included in the immediate public report if they can be typed up quickly enough. These comments are often extraordinary, e.g., “I learned more about the entire state in five days than I have in a lifetime.” They give wonderful feedback about the Citizens Jury experience. Occasionally they are critical, and that perspective is also useful. These comments *with attribution to each juror* are part of the final report. Refer to previous final reports to see how these comment are presented in the final report.

See sample Juror Comment Form.

Pre- and post-surveys

Research is sometimes conducted during the course of a project to determine whether the jurors opinions changed over the course of the week’s education and deliberation and, if so, at what point they changed. This evaluation is a way to track the impact of different stages of the project on jurors. It is done as follows:

- On the introductory day, jurors complete a questionnaire, clearly marked as No. 1, in which they are asked their opinions on key issues related to the Citizens Jury topic. They do not sign the questionnaire. Each juror seals it in an envelope and writes his or her name on the front.
- Following all the witness presentations, the jurors may complete a second questionnaire with the same questions, marked as No. 2, and follow the same procedure.
- At the conclusion of the project, after the deliberations, jurors complete the final questionnaire, No. 3. Their first two envelopes are returned to them. They open them, take those two forms and the third one, just completed, and seal them in a new envelope. They do not write their names on this envelope. This enables staff to view the evolution of one person’s opinions on key topics over the length of the project and still preserves the anonymity of the jurors.

Note: In some projects, this research is done without anonymity. In this case, the jurors simply sign all their forms and the elaborate procedures are not necessary.

Advocate and witness evaluations

Project directors in recent projects have undertaken to ask the experts--be they advocates, neutral resources, or witnesses--to give their evaluation of the part of the project in which they were involved. Not only does this indicate to them that we value

their comments, but these opinions also provide feedback from a different perspective and may suggest modifications for the future.

De-briefing with sponsor(s) and project staff

Another part of evaluating the project involves meeting with the sponsor(s) and project staff to get their input on how the project went and how successful it was from their perspective. These are usually very open discussions with no set agenda or specific questions to be asked. The meeting should take place relatively soon after the completion of the project while it is fresh in everyone's' minds.

Media

All the newspaper articles about the project should be collected, and selected ones will form part of the final report. The media coverage will demonstrate the success — or lack thereof — of the project's media plan (see next chapter) and will suggest strategies for media coverage in future projects.

Staff may want to ask friends and family to record various radio and television news broadcasts to compile a record of news coverage. If the jury proceedings have been aired on radio, staff should ask the radio station to keep track of the comments on listener hot lines.

Thank You Notes to Jurors

It is important to send the jurors a thank you note, a photo (if taken), and a copy of the final report after the completion of the project.

Chapter 18

MEDIA

In most cases the success of a Citizens Jury project is closely tied to the exposure it receives in the media and the resulting reception from the public and policy makers. For this reason it is essential that an overall communications plan be created at the beginning of the project and that decisions made early in the process include consideration of this aspect of the project.

Public Relations

Media work is crucial to the success of the project, as the ultimate impact of a project often depends on widespread dissemination of the issue information to the public and policy makers. The public relations director will develop a comprehensive media plan to include:

- Developing strategies to inspire community interest;
- Creating media contact mailing lists;
- Writing news advisories, news releases, and op-eds;
- Contacting reporters regularly;
- Visiting editorial boards and television producers;
- Writing, putting together, and delivering press kits/briefing materials;

Media Co-sponsorship

Figuring out how to get the best media coverage can involve co-sponsoring the project with a branch of the media like public radio. This guarantees coverage with the audience that normally tunes into that station. However, it will also have an impact on competing stations, which may not cover it fully.

A media co-sponsor may be able to provide a professional commentator to serve as a moderator. If the jury is carried live, the moderator will be able to make the process more listener-friendly and therefore involve the listening public. During hearing breaks, the sponsoring station can fill in time with interviews of issue experts, staff, and jurors.

Another advantage to co-sponsorship with public radio or even television is that the stations connections with other affiliates may enable the project to get widespread distribution throughout a state. Because of forging such a connection, the 1994 Pennsylvania Gubernatorial Citizens Jury was carried live on public radio in both Pittsburgh and Philadelphia for four days.

Media Planning

The media plan consists of a description of the media coverage goals and a detailed plan to achieve them. This is a month-by-month schedule of activities to attract coverage of the process before, during and after the hearings in order to reach as wide an audience as possible.

Part of developing a plan for the media involves dealing early on with any specific issues that will affect reporters. It is important to choose a hearing site that has

adequate outlets and power sources for television cameras, for example, and work space and telephones for reporters on deadline. Scheduling of news conferences should be done with due consideration for broadcast hours and press deadlines.

Developing a current, comprehensive list of contacts at each newspaper, radio, and television station will help ensure broad coverage. The list should include the name of the paper or station, address, telephone/fax numbers, and contact person(s). Careful records should be kept all conversations, including when they happened and what was said. This reference will be helpful over the long nurturing process.

The media plan should also detail an advisory and news release schedule. This schedule should reflect the high points of interest, such as:

- Announcement of the project;
- Receipt of major funding;
- The selection of jurors, not including their names, ages, occupations, and hometowns (to prevent pre-jury lobbying);
- Expert witnesses who will be testifying;
- Highlights of each hearing day;
- News conference announcing final results; and
- Follow-up influence of the work of the jurors.

In addition to the commercial and public media, the media plan should target private newsletters and organizations that have an interest in the project or issues.

Hiring a clipping service to collect all the articles written about the Citizens Jury will document the public reach of the jurors work. Television and radio tracking services are also available.

Media to Consider

Radio

Both commercial and public radio are common sources for Citizens Jury coverage. Public radio is an excellent avenue for sponsorship or co-sponsorship since they are a 501 (c)(3) and therefore can receive tax-deductible money from foundations or corporations. If sponsorship is feasible, an agreement should be written up defining the roles of each organization.

Radio networks that collect stories for wider distribution should also be investigated. Public and commercial radio stations in a state may have a common connection from the state capitol and feed stories to local stations.

POSSIBLE COVERAGE TO SEEK ON RADIO

<i>Commercial Radio:</i>	<i>Public Radio:</i>
News	News
Feature interviews	Feature interviews
Talk shows	Talk shows
	Sponsorship & complete coverage

Television

In this day and age, conventional wisdom says that you don't exist unless you are on television. Many communities have access to commercial, public, and cable television. Getting coverage, however, is often very difficult since television often caters to 30-second sound bites for news items. The length of the Citizens Jury hearings and deliberations does not lend itself easily to television news coverage because it requires so much dedicated time by reporters. Therefore, it helps to spoon feed the 30-second news summary to the commercial stations and encourage them to send a camera for footage of the jurors in action. They may also be interested in featuring the project on a public affairs program and interviewing a couple of jurors. Tracking the thoughts of one or more jurors throughout the process could offer continuity for the program.

Cable television's public access is often interested in taping the entire process, then editing it into a one-hour special or a series of specials. This is also a good source for a complete videotaped record of the hearings and deliberations. Cable TV may also have a statewide network that shares programming for local public access channels.

Hiring a television production company is also a way to produce an hour special on the Citizens Jury for broadcast on public or cable television. This, of course, can be very expensive and must be part of the initial fundraising budget. The 1993 National Health Care Citizens Jury in Washington resulted in a one-hour public television special hosted by Roger Mudd.

POSSIBLE COVERAGE TO SEEK ON TELEVISION

<i>Commercial TV</i>	<i>Public TV</i>	<i>Cable TV</i>
News	News (if available)	News (if available)
Public Affairs feature	1-hour Special	1-hour special
Track one juror throughout		Tape procedures
		Statewide program

Newspapers

Early contact with the newspaper editorial boards will help pave the way for future coverage of a project, help in securing funding, and, in the case of an election issues jury, encourage the candidates to participate because the media are interested. Identifying the reporters who cover the issues the jurors will focus on is also essential. Making frequent contact with these reporters to explain the process and purpose of the project and to offer news suggestions will help get coverage when the hearings and deliberations happen. Reporters want to know what the story is and how the headline

could read. All media are also looking for a hook or angle that makes it interesting and newsworthy.

The wire services such as AP and UPI will feed stories to the smaller newspapers in suburban and rural areas. For regional, statewide, and nationwide coverage, it is crucial to keep the wire services informed.

Weekly or bi-weekly newspapers should not be overlooked. They often will publish exactly what is sent to them and are particularly interested in articles that pertain to individuals in their community. Targeting daily, weekly, or bi-weekly newspapers to feature stories on a juror from their town will often get results. Providing photos is also a good idea.

Particular attention should be paid to deadlines of newspapers. Find out the deadlines for the daily morning and evening newspapers you want to target. Weekly papers usually go to press two days before distribution.

POSSIBLE COVERAGE TO SEEK IN NEWSPAPERS

<i>Daily newspapers</i>	<i>Weekly newspapers</i>
News	News
Editorials	Editorials
Op-eds	Op-eds
Feature stories	Feature stories
	Photos

Magazines, journals, and periodicals

Magazines, journals, and periodicals need lead time for their publication but are often interested in citizens discussion of public policy issues. Researching what those major publications are and sending them advisories could add to the distribution of the Citizens Jury information. As is important with all media contacts, finding out who the reporters, editors, and publishers are and nurturing those individuals with personal visits and phone calls can produce good results. This nurturing process may take months of advance work.

Internet

All of the elements discussed above can be put on a project website. A website allows you to put a lot more detailed information than is possible to have in traditional media sources. The project's final report, witness materials, and background information can all be posted on the website. A project website can be accessed during the project, and can be maintained as a great information resource for as long as desired.

In all communication pieces, you should list the URL (web address) where information about the project can be accessed. Work with sponsors and partners to have them put links on their own webpages directing people to the project website. If you do not already have a website that you can add project information, you may also consider putting project information up on partner web pages. Putting the jurors final report on

the Internet is a good way to reach a different segment of the community and can reduce printing costs. If reports are posted on a webpage, it is essential to make sure that the reports are in a format that cannot be altered. For example, do not place the Final Report as a MS Word file, but rather consider using PDF format, (Adobe Acrobat).

Chapter 19

MODERATORS

The purpose of the moderators is to lead the jurors through what is usually a long and complicated agenda in a way that enables them to understand what they are doing and why, and to facilitate the discussion sessions so that the jury arrives at conclusions and clear recommendations.

A Citizens Jury project cannot be successful without qualified and skilled moderators. Due to the nature of the Citizens Jury project, a team of two moderators is necessary. Sometimes one moderator is “on duty” leading the jurors through discussion, while the other is observing. Each moderator will serve in each capacity throughout the hearings. *The “secondary” moderator is not off-duty.* It is important that the secondary moderator for each session listen carefully to the discussion, observe jurors and witnesses, be on alert for negative jury dynamics, assist with a group activity, and help with any necessary recording on flip charts.

The goal of deliberations and discussion sessions is to seek consensus and common ground whenever possible. However, consensus is not always possible. In such cases, a vote may be necessary. There are several different types of voting including weighted voting and silent ballots, which may be employed in situations as appropriate. The hearings are *not* conducted using rules of procedure borrowed from the legal system. Considerable latitude is given to the witnesses to make their statements. The aim of the moderators will be to ensure fairness, to maintain decorum, and to see that the designated topic is adhered to within broad limits.

Since the moderators are most closely connected to the jurors and will have the best sense of how the jury is feeling, it is imperative that the moderators participate fully in the daily staff meetings held during the hearing week. It is the moderators’ responsibilities to represent the jurors’ best interests, while other project staff may be responsible to represent the best interests of the sponsor and the process. Based on all concerned, changes to the agenda may be made to accommodate the needs of the jury. For example, additional discussion time can be added in or a witness may be called back in for clarification. During these discussions, however, the moderators may need to defer to the project director or the Jefferson Center Executive Director. While discussion and contributions from the entire project team are essential, the project director and Executive Director have the final say on decisions.

A key responsibility of the moderators is to ensure that the charge questions are answered. The moderators must direct the discussion and deliberations in such a way so as to focus the jurors on the charge in the given timeframe. The jury may choose to go beyond the charge, but the charge questions are first priority. In addition, the jury may choose to not answer a charge question or to answer it a different way, but they must provide detailed reasoning for altering the charge.

Choice of Moderators

Care and deliberation should be taken to choose persons who meet the qualifications described below. Because of the strenuousness of the process, it is usually advisable to have two moderators. The moderator not on duty can be observing, listening critically to the flow of conversation, and doing any necessary recording on flip charts. Having two moderators also helps in the process of summarizing results after each session.

The Jefferson Center has developed a [Moderator Training Guide for Citizens Jury Projects](#). Please refer to this for more detailed information on moderating.

It is essential for the project staff to meet with the moderators and discuss the process and the project with them and make sure that they understand the unique elements of moderating a Citizens Jury project. It is also VERY important for the two moderators to get to know each other and each other's working style prior to the hearings. The moderators should play a role in the development of the agenda.

Sources of Moderators

The League of Women Voters is a good source of moderators because of the extensive experience its members have in running nonpartisan candidate forums. Previous juries have also used professional facilitators, radio hosts, professors, and staff of the sponsoring institutions. Sometimes this is expensive, sometimes it can be donated in-kind. The University Extension Services has also successfully moderated three of the most recent projects.

Qualifications Needed

A Citizens Jury Moderator should have:

- Considerable skill and experience in moderating or facilitating meetings. Because of the variety of people serving on Citizens Jury projects and the importance given to the participation of all, the facilitating is often demanding;
- A reputation for nonpartisanship, both politically and in terms of the specific issue under discussion by the Citizens Jury. The moderator should not be a known advocate for one side of an issue or for a political party favoring one side;
- Either some direct knowledge of the topic or the time to acquire that knowledge before the events;
- The ability to be empathetic with different types of people and to be able to draw out their concerns and questions. Reputation and skill are less important to the jurors than the feeling that the moderator cares about them and is acting on their behalf in their dealing with the people who come before the jury;
- Knowledge of different types of group processes to make sure that all jurors feel that they have had the opportunity to be heard;
- The ability to work as a member of the project team, working closely with the project director and staff.

Specific Responsibilities of Moderators

Planning

- Participate in the design of the agenda and charge, when possible, bringing to the process the perspective of the person who will lead the jurors through it.

Facilitating

- Keep foremost in consideration the Citizens Jury principle that the jurors are in charge of the process.
- Be able to monitor the jurors' level of satisfaction with what is happening;
- Help the jurors clarify and refine their statements without putting words in their mouths or leading them in one direction or another.
- Ensure that all the jurors are given an opportunity to express their opinions and ask questions, to make sure all their concerns are aired.
- Be responsible for ensuring that the jurors are treated in a respectful manner and that their needs are met during the intense time they spend at the hearings.
- Create a climate within which the jurors feel good about their tasks, meld as a group, and operate with mutual respect.
- Suggest some kind of framework for the jurors to finish putting their ideas together in a timely and organized fashion.
- Work with the jurors to pull out their ideas instead of leading the jurors in order to bring them to a good set of recommendations.
- Keep close track of the timing of hearings so that neither witnesses nor jurors are shorted in the time they deserve, both for discussion and for breaks.
- Ensure that the rules of procedure are explained to the jurors and are followed throughout the proceedings.
- Be aware of the format and goal of each session, so as to direct the flow of conversation appropriately.
- Facilitate the interaction between the jurors and the person brought in as expert witnesses or advocates. Depending on the format, the persons appearing before the jury may give a formal presentation first or simply be available to answer jurors' questions. If a formal presentation is given, the moderator will need to listen carefully and be ready to involve the jurors in the discussion.
- Ensure that there is no inappropriate lobbying going on amongst the jurors or between stakeholders and jurors.
- Question the experts directly if the jurors seem reluctant or unable to do so. The goal is to let the jurors ask the questions on their own, but at the beginning of the process, the jurors may be shy about this. Also, if the topic is complicated, they may just not know how to begin. The moderator can help with questions or prompting of the jurors.
- Facilitate the interaction among the jurors themselves in the sessions in which they frame questions, reach conclusions, or develop recommendations. This work will usually involve restraining the very vocal jurors and bringing out the ideas of the quiet jurors. Sometimes the goal is a consensus conclusion and

at others a vote is taken. In either case, jurors will be asked to explain their conclusions, and the moderator needs to help them not only reach their decisions but be able to tell the reasons to the public.

- HAVE FUN! This is a great time where great things can and do happen, so enjoy yourself and the hearings.

Meeting with Staff

- Be advocates of the jurors when uncertainties arise within the project staff. Always represent the jurors best interests.
- Work cooperatively with other project staff, before and throughout the hearings.

Evaluating

- At the conclusion of the process, suggest any improvements for future projects.

SAMPLE DOCUMENTS

	<u>PAGE</u>
Sample Surveys	70-83
<i>Global Climate Change</i>	70
<i>Metro Solid Waste</i>	75
<i>Minnesota Property Tax</i>	80
Sample Grid - <i>Global Climate Change</i>	84
Letter to interested Survey Respondents	85
Confirmation letter to Jurors	86
Confirmation letter to Alternates	87
Expectation sheet for Jurors	88
Expectation sheet for Alternates	89
Thank you letter to potential jurors	90
Agendas	91-102
<i>Global Climate Change</i>	91
<i>Metro Solid Waste</i>	95
<i>Minnesota Property Tax</i>	99
Letters for Witnesses	103
Optional forms for Witnesses	105
Witness Guidelines	106
Juror Personal Comment Form	107
Evaluation Form for Jurors	108
Discussion Ground Rules	111
Rules of Procedure	112

SURVEY – GLOBAL CLIMATE CHANGE

**QUESTIONNAIRE
CITIZENS JURY ON GLOBAL CLIMATE CHANGE**

1-A. Hello, this is (NAME), calling on behalf of the Jefferson Center. We are conducting a short survey about climate change. This project is being supported by the US Environmental Protection Agency. We are not selling anything and we are not asking for a donation. This is a survey that will take less than 5 minutes.

B. In order to reach a random sample of participants, we are interviewing the adult, 18 years of age or older, who had the most recent birthday. May I speak with the person in your household who is age 18 or older and had the most recent birthday?

IF PERSON ANSWERING THE PHONE HAD THE LAST BIRTHDAY, CONTINUE.

IF SOMEONE ELSE HAD THE LAST BIRTHDAY, REPEAT “A” WHEN APPROPRIATE RESPONDENT COMES TO THE PHONE, AND THEN SKIP TO C.

IF APPROPRIATE RESPONDENT IS NOT AVAILABLE NOW, MAKE AN APPOINTMENT TO CALL BACK.

C. The Jefferson Center is a non-profit, non-partisan organization promoting citizen involvement in public policy. The Jefferson Center, with the support of the US Environmental Protection Agency, wants to hear from citizens regarding global climate change issues. Would you be willing to answer a few questions on the subject?

Yes..... 1	→	CONTINUE.
No..... 2	→	SET A CALLBACK TIME OR DISCONTINUE.

2A. Global climate change is a term used to describe changes in the earth’s climate. It has also been referred to as the greenhouse effect or global warming. How much have you heard or read about global climate change – **READ LIST:**

A lot.....	1
Some.....	2
Not much.....	3
or Nothing at all	4
DO NOT READ: Don’t Know/Refused.....	5

2-B. How much are you, personally, concerned about global climate change – **READ LIST:**

- A great deal..... 1
- A fair amount..... 2
- Only a little 3
- or Not at all 4
- DO NOT READ:** Don't Know/Refused..... 5

3-A. Do you think global climate change is an environmental problem that is causing a serious impact now, or do you think the impact of climate change won't happen until sometime in the future, or do you think that climate change won't have a serious impact at all?

- Impact now 1
- Sometime in the future 2
- No serious impact at all..... 3
- DO NOT READ:** Don't Know/Refused..... 4

3-B. Do you think that climate change is a – **READ LIST:**

- Very serious problem 1
- Fairly serious problem 2
- Not very serious problem 3
- or Not at all serious problem..... 4
- DO NOT READ:** Don't Know/Refused..... 5

4. Would you be willing to pay 50 cents more per gallon of gasoline if it would significantly reduce global climate change?

- Yes 1
- No..... 2
- DO NOT READ:** Don't Know/Refused..... 3

5. Do you live in an urban area, a suburban area, or a rural area?

- Urban area 1
- Suburban..... 2
- Rural..... 3
- Refused..... 4

6. After this survey is completed, we will select people to serve on a panel similar to a jury. The Citizens Jury, as it is called, is being held to hear citizens' recommendations about global climate change. There will be five days of hearings at which information will be presented to the Citizens Jury from a number of different perspectives. The project is being conducted by the Jefferson Center with the support of the US Environmental Protection Agency. The Citizens Jury will be held next January 14th through the 18th from 8:30 AM to 4:30 PM in the Baltimore area. Those who are selected to participate will be paid a total of \$700 for their services.

A. If you were selected to participate on the Citizens Jury, is this something that you probably would want to do, might want to do, or probably would not want to do?

- Probably would..... 1 → **SKIP TO Q6-C.**
- Might..... 2
- Probably not 3 → **CONTINUE.**

B. I just want to verify that I reached you at (READ PHONE #).

Thank you for your help. That's all the survey questions we have for you today.

DISCONTINUE INTERVIEW.

C. I won't try to give you any more details over the phone, but we'd like to send you more information about the project. Would you be willing to give me your name and address so I can send you the details? The information you give me will be used by the Jefferson Center for this project only and will not be released to anyone else.

NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

**REPEAT NAME AND ADDRESS BACK TO RESPONDENT. SPELL WORDS AS NEEDED.
IF REFUSED TO GIVE NAME AND ADDRESS, THANK RESPONDENT AND DISCONTINUE.**

D. I want to verify that I reached you at (READ PHONE #).

The participants will be selected to represent a diverse cross-section of citizens of the Mid-Atlantic states. I have just a few more questions for classification purposes.

7. Is your age – **READ LIST:**

- 18 to 34 1
- 35 to 54 2
- or 55 or older 3
- DO NOT READ:** Refused 4

8. What is the highest level of schooling you have completed? **READ LIST:**

- High school graduate or less 1
- Some college or some technical school 2
- 2-year Associate degree 3
- 4-year College graduate or more 4
- DO NOT READ:** Refused 5

9-A. Are you of Hispanic or Latino origin?

- Yes 1
- No 2
- Refused 3

9-B. What race do you consider yourself to be – **READ LIST:**

- White or Caucasian 1
- Black or African-American 2
- Asian or Pacific Islander 3
- Native American 4

Some other race: _____ 5

or A combination of races: _____ 6

DO NOT READ: Refused 7

10. Politically speaking, do you consider yourself to be – **READ LIST:**

Democrat 1

Republican..... 2

or Other..... 3

DO NOT READ: Refused 4

11. **RECORD GENDER. DO NOT ASK UNLESS UNSURE.**

Male 1

Female..... 2

12. When would be a good time to reach you by phone if you are selected for this project?

Daytime 1

Evenings 2

Weekends 3

Other: _____ 4

13. **THANK RESPONDENT AND DISCONTINUE.**

14. **NOTES:** _____

SURVEY – METRO SOLID WASTE

**QUESTIONNAIRE
CITIZENS JURY ON SOLID WASTE**

1-A Hello, this is (NAME). I'm calling on behalf of the Solid Waste Management Coordinating Board, and the Jefferson Center. We are conducting a short survey about solid waste management issues in the Twin Cities Metro Area. We are not selling anything and we are not asking for a donation. This is a survey that will take less than 5 minutes.

B. In order to reach a random sample of participants, we are interviewing the adult, 18 years of age or older, who had the most recent birthday. May I speak with the person in your household who is age 18 or older and had the most recent birthday?

IF PERSON ANSWERING THE PHONE HAD THE LAST BIRTHDAY, CONTINUE.

IF SOMEONE ELSE HAD THE LAST BIRTHDAY, REPEAT "A" WHEN APPROPRIATE RESPONDENT COMES TO THE PHONE, AND THEN SKIP TO C.

IF APPROPRIATE RESPONDENT IS NOT AVAILABLE NOW, MAKE AN APPOINTMENT TO CALL BACK.

C. We are interviewing people who live in specific metro area counties. In what county do you live? **DO NOT READ LIST:**

- | | | | |
|------------------|---|---|--------------------|
| Anoka | 1 | } | SKIP TO Q2. |
| Carver | 2 | | |
| Dakota | 3 | | |
| Hennepin | 4 | | |
| Ramsey | 5 | | |
| Washington..... | 6 | | |
| Other..... | 7 | → | CONTINUE. |
| Don't Know | 8 | → | SKIP TO Q2. |

D. I'm sorry, I won't be able to include you in this survey. Thank you very much.
DISCONTINUE INTERVIEW.

2. The Jefferson Center is a non-profit, non-partisan organization promoting citizen involvement in public policy. A group of counties dealing with solid waste issues wants to hear from citizens regarding solid waste management. Would you be willing to answer a few questions on the subject?

3. My first question is about the trash that you dispose of in your garbage can. I am not asking about what you might recycle. Once the trash in your garbage can is picked up by your hauler, what do you think happens to it – Do you think your trash is taken to –
READ LIST:

- A landfill located in Minnesota 1
- A landfill located outside of Minnesota 2
- A waste to energy plant,
 such as the one in
 Minneapolis, Elk River,
 or Newport..... 3
- or Don't you know 4
- DO NOT READ:** Refused 5

4-A. Again, thinking of the trash that you dispose of in your garbage can, which of the following is of highest priority to you when making decisions about how to dispose of your garbage – **READ LIST:**

- Cost 1
- Convenience 2
- or Environmental protection 3
- DO NOT READ:** Don't Know/Refused/Other 4 → **SKIP TO Q5.**

4-B. What would be your next highest priority – **READ ONLY RESPONSES NOT MENTIONED AT Q4A:**

- Cost 1
- Convenience 2
- or Environmental protection 3
- DO NOT READ:** Don't Know/Refused/Other 4

5-A. My next question is about how you prefer to receive information about waste reduction, recycling, and household hazardous waste. Do you prefer to receive this type of information – **READ LIST ONE AT A TIME:**

	YES	NO	DK
By mail	1	2	3
On TV.....	1	2	3
In a newspaper.....	1	2	3
On radio	1	2	3
In a community newsletter	1	2	3
From schools.....	1	2	3
From community groups	1	2	3
From your trash hauler.....	1	2	3

5-B. Would you prefer to receive this type of information in any other way?

Yes	1
No.....	2
Don't know.....	3

6. After this survey is completed, we will select people to serve on a panel similar to a jury. The Citizens Jury, as it is called, is being held to hear citizens' recommendations about what to do with the increasing amount of solid waste generated in the Twin Cities metro area – including waste reduction, reuse, recycling, processing, and disposal strategies. There will be five days of hearings at which information will be presented to the Citizens Jury from a number of different perspectives. The project is being conducted by the Jefferson Center on behalf of the Solid Waste Management Coordinating Board, an intergovernmental coalition. The Citizens Jury will be held June 18th through the 23rd from 8:30 AM to 4:30 PM in the metro area. Those who are selected to participate will be paid a total of \$500 for their services.

A. If you were selected to participate on the Citizens Jury, is this something that you probably would want to do, might want to do, or probably would not want to do?

Probably would.....	1	}	→	SKIP TO Q6-C.
Might.....	2			
Probably not	3		→	CONTINUE.

B. I just want to verify that I reached you at (READ PHONE #).
 Thank you for your help. That's all the survey questions we have for you today.
DISCONTINUE INTERVIEW.

C. I won't try to give you any more details over the phone, but we'd like to send you more information about the project. Would you be willing to give me your name and address so I can send you the details?

NAME: _____

ADDRESS: _____

CITY: _____ ZIP: _____

**REPEAT NAME AND ADDRESS BACK TO RESPONDENT. SPELL WORDS AS NEEDED.
IF REFUSED TO GIVE NAME AND ADDRESS, THANK RESPONDENT AND DISCONTINUE.**

D. I want to verify that I reached you at (READ PHONE #).

The participants will be selected so they represent a diverse cross-section of Twin Cities Metro Area citizens. I have just a few more questions for classification purposes.

7. Is your age – **READ LIST:**

- 18 to 34 1
- 35 to 54 2
- or 55 or older 3

8. What is the highest level of schooling you have completed? **READ LIST:**

- High school graduate or less 1
- Some college or some technical school 2
- College graduate or more 3

9-A. Are you of Hispanic or Latino origin? – **DO NOT READ LIST:**

- Yes 1
- No 2
- Refused 3

9-B. What race do you consider yourself to be – **READ LIST:**

- White or Caucasian 1
- Black or African-American 2
- Asian or Pacific Islander 3
- Native American 4
- Some other race: _____ 5
- or A combination of races: _____ 6

10. Politically speaking, do you consider yourself to be – **READ LIST:**

- Conservative 1
- Moderate..... 2
- or Liberal 3
- DO NOT READ:** Refused/Other 4

11. **RECORD GENDER. DO NOT ASK UNLESS UNSURE.**

- Male 1
- Female 2

12. When would be a good time to reach you by phone if you are selected for this project?

- Daytime 1
- Evenings 2
- Weekends 3
- Other: _____ 4

13. **THANK RESPONDENT AND DISCONTINUE.**

14. **NOTES:** _____

SURVEY – MINNESOTA PROPERTY TAX

**Questionnaire
Citizens Jury® on Minnesota Property Tax Reform**

1-A. Hello, this is (NAME). I am calling on behalf of Governor Ventura, the Minnesota Department of Revenue and the Jefferson Center. We are conducting a short survey about the property tax system and reform. We are not selling anything and we are not asking for a donation. This is a survey that will take less than 5 minutes.

B. In order to reach a random sample of participants, we are interviewing the adult, 18 years of age or older, who had the last birthday. May I speak with the person in your household who is age 18 or older and had the last birthday?

IF THE PERSON ANSWERING THE PHONE HAD THE LAST BIRTHDAY, CONTINUE.

IF SOMEONE ELSE HAD THE LAST BIRTHDAY, REPEAT “A” WHEN RESPONDENT COMES TO THE PHONE, AND THEN SKIP TO C.

IF APPROPRIATE RESPONDENT IS NOT AVAILABLE NOW, MAKE AN APPOINTMENT TO CALL BACK.

C. The Jefferson Center is a nonprofit, nonpartisan organization promoting citizen involvement in public policy. Governor Ventura and the Minnesota Department of Revenue want to hear from citizens regarding property tax reform. Would you be willing to answer a few questions on the subject?

2. In general, how well do you feel that you understand the current Minnesota state property tax system? Do you –

- | | |
|-------------------------------------|---|
| Understand it <u>very</u> well..... | 1 |
| <u>Somewhat</u> well..... | 2 |
| <u>Not very</u> well..... | 3 |
| <u>Not at all</u> well..... | 4 |
| (Don't read) Don't Know/Refuse..... | 5 |

3. How satisfied are you with the current Minnesota state property tax system? Are you –

- | | |
|-------------------------------------|---|
| <u>Very</u> satisfied..... | 1 |
| <u>Somewhat</u> satisfied | 2 |
| Somewhat <u>dissatisfied</u> | 3 |
| <u>Very</u> dissatisfied..... | 4 |
| (Don't read) Don't Know/Refuse..... | 5 |

4. In general, do you think that your property taxes are –

- | | |
|---------------------------|---|
| <u>Very</u> high..... | 1 |
| <u>Somewhat</u> high..... | 2 |
| About right..... | 3 |
| Somewhat <u>low</u> | 4 |

- | | | |
|--------------|-------------------------------|---|
| | <u>Very</u> low..... | 5 |
| (Don't read) | Don't pay property taxes..... | 6 |
| (Don't read) | Don't Know/Refuse..... | 7 |
5. In terms of your primary residence, are you a –
- | | | |
|--------------|-----------------------------|---|
| | Homeowner..... | 1 |
| | Renter..... | 2 |
| | Farmer..... | 3 |
| (Don't read) | Don't Know/Refuse/Other.... | 4 |
- 5a. In addition to your primary residence, do you own a business or business property?
- | | | |
|--|----------|---|
| | Yes..... | 1 |
| | No..... | 2 |
- 5b. In addition to your primary residence, do you own a cabin or lake property?
- | | | |
|--|----------|---|
| | Yes..... | 1 |
| | No..... | 2 |
6. I will describe a situation and I would like you to tell me what you think. A home valued at \$100,000 is located in the same city, county, and school district as a business property or an apartment building also valued at \$100,000. According to the current Minnesota property tax system, the homeowner will pay:
- | | | |
|--------------|--|---|
| | <u>More</u> in property taxes than the
business or apartment owner..... | 1 |
| | <u>Less</u> in property
taxes..... | 2 |
| | About the <u>same</u> in property
taxes..... | 3 |
| (Don't read) | Don't
Know/Refuse..... | 4 |
7. After this survey is completed, we will select people to serve on a panel similar to a jury. The Citizens Jury, as it is called, is being held to hear citizens' recommendations about property tax reform. There will be five days of hearings at which information will be presented to the Citizens Jury from a number of different perspectives. The project is being conducted by the Jefferson Center for the Minnesota Department of Revenue and Governor Ventura. The Citizens Jury will be held August 2nd through the 6th from 8:30 AM to 4:30 PM at the State Capitol in Saint Paul. Those who are selected to participate will be paid a total of \$500 for their services. Those from outside the Twin Cities metro area will be provided lodging and travel expenses in addition to the \$500.

A. If you were selected to participate on the Citizens Jury, is this something that you probably would want to do, might want to do, or probably would not do?

- Probably would..... 1 → Go to 7C
- Might 2 → Go to 7C
- Probably not..... 3 → Go to 7B

B. I just want to verify that I reached you at (READ PHONE #).

Thank you for your help. That's all the survey questions we have for you today.

DISCONTINUE INTERVIEW

C. I won't try to give you any more details over the phone, but we'd like to send you more information about the project. Would you be willing to give me your name and address so I can send you the details?

NAME:

ADDRESS:

CITY:

ZIP:

REPEAT NAME AND ADDRESS BACK TO RESPONDENT. SPELL WORDS AS NEEDED.

IF REFUSED TO GIVE NAME AND ADDRESS, TALLY AND DISCONTINUE.

D. I want to verify that I reached you at (READ PHONE #).

The participants will be selected to represent a diverse cross-section of Minnesota citizens. I have just a few more questions for classification purposes.

8. Is your age –

- 18 to 24..... 1
- 25 to 34..... 2
- 35 to 44..... 3
- 45 to 54..... 4
- 55 or older..... 5

9. Do you live in the Twin Cities metro area?

- Yes..... 1 → **Go to 9A**
- No..... 2 → **Go to 10**

9a. In what city or suburb do you live? → **Go to 11**

10. I am going to read you a list of cities. If you live in one of the cities on the list, please tell me when I read it.

Duluth.....	1	Hutchinson.....	11
Mankato.....	2	Marshall.....	12
Moorhead.....	3	New Ulm.....	13
Rochester.....	4	Northfield.....	14
St Cloud.....	5	Owatonna.....	15
Albert Lea.....	6	Red Wing.....	16
Austin.....	7	Willmar.....	17
Brainerd.....	8	Winona.....	18
Fairbault.....	9	Not reside in above list.....	19
Fergus Falls.....	10		

11. In what county do you reside?

12. What is the highest level of schooling that you have completed?

High School graduate or less.....	1
Some College or technical school.....	2
College graduate or more.....	3

13. What race do you consider yourself to be?

White/Caucasian.....	1
Black/African-American.....	2
Asian/Pacific Islander.....	3
Native American.....	4
Other.....	5

14. DO NOT ASK GENDER UNLESS UNSURE.

Male.....	1
Female.....	2

15. When would be a good time to reach you by phone if you are selected for this project?

Daytime.....	1
Evenings.....	2
Weekends.....	3
Other: _____	

Thank Respondent and Discontinue.

GRID – GLOBAL CLIMATE CHANGE

	DEMOCRAT		REPUBLICAN		OTHER/IND.	
	HS or less White	Some College or tech Non-White	HS or less White	Some College or tech Non-White	HS or less White	Some College or tech Non-White
URBAN	18-34					
	35-54					
	55+					
SUBURBAN	18-34					
	35-54					
	55+					
RURAL	18-34					
	35-54					
	55+					

Note: Identification Numbers were color-coded in response to an attitudinal question on the survey specific to the issue, which served as a 'sub-target.' Two of these grid were used – one for males and one for females.

LETTER TO INTERESTED SURVEY RESPONDENT

June 25, 1999

«FrstName» «LastName»
«Address»
«City» «State» «Zip»

Dear «FrstName» «LastName»,

We are writing to you as a follow-up to a survey which you recently completed. Thank you for your interest in participating in the upcoming Citizens Jury[®] on Minnesota Property Tax Reform. This project is being conducted by the Jefferson Center and is sponsored by the Minnesota Department of Revenue with the support of Governor Jesse Ventura.

The Citizens Jury will convene a group of 18 Minnesota citizens, selected to be a representative microcosm of the state. Over five consecutive days, the jurors will hear from expert witnesses regarding a range of issues and perspectives related to property taxes. As a juror, you will discuss and develop recommendations for the Revenue Department and Governor Ventura about how to proceed with property tax reform.

The Citizens Jury will be held **August 2nd to August 6th** from 8:30 AM to 4:30 PM at the State Capitol. Each juror will be paid a stipend of **\$500** for their time, and meals (breakfast & lunch) will be provided. In addition, those jurors from outside the Twin Cities metro area will also be provided lodging, travel expenses, and an evening meal.

Enclosed are some materials on the Jefferson Center and the Citizens Jury process, as well as an overview of this project. If you are willing to participate in this project as a juror, **please return the Information Form in the enclosed *postage paid envelope TODAY***. Your name will then be placed in the final pool from which the participants will be selected. **Information Forms received after JUNE 30 will not be entered into the jury pool.** We will notify you by July 10 if you are selected to participate in this special project.

This is a unique opportunity for citizens to have a significant impact on the development and shape of policies that directly affect their lives as well as the lives of all Minnesotans. The Jefferson Center, the Minnesota Department of Revenue, and Governor Jesse Ventura urge you to participate.

Please call us at the Jefferson Center at 612-926-3292 if you have any questions about this project. Thank you for your time and consideration of this important issue.

Sincerely yours,

Doug Nethercut
Executive Director

Keiko Veasey
Project Director

CONFIRMATION LETTER TO JURORS

Month, day, year

Name

Address

City, State ZIP

Dear Mr./Ms. Name,

Congratulations on being selected as one of 18 citizens to participate in the Citizens Jury[®] on Minnesota Property Tax Reform!

The Jefferson Center is working with the Minnesota Department of Revenue to conduct this Citizens Jury project. This project is being conducted to hear what the citizens of Minnesota truly want done regarding property tax reform. As a juror, you will be asked to give recommendations to the Department of Revenue and the Governor's Office regarding the direction of property tax reform in the state.

The jury will meet Monday August 2 through Friday August 6, from 8:30 AM to 4:30 PM each day. The hearings will take place Room 15 of the State Capitol in Saint Paul. As a juror, you will be paid a total of \$500 for five days of participation. Continental breakfasts, lunches, and snacks will be provided for you throughout the week. Enclosed you will find a summary sheet of what to expect for the week, a parking pass, a map to the project site, as well as a map of the Capitol.

The Jefferson Center will be in touch with you prior to the week of the Jury to answer any questions you may have and to confirm your participation. Please feel free to contact us in the meantime, especially if you have any dietary or health concerns we should be aware of for the week. Also, if any problems arise and you are unable to participate, please call us immediately, as we will have to find a replacement for you. Thank you for your interest and time in this project. I look forward to meeting you!

Sincerely,

Keiko Veasey
Project Director

CONFIRMATION LETTER TO ALTERNATES

month, day, year

Name

Address

City, State ZIP

Dear Mr./Ms. Name,

Thank you for agreeing to be an alternate for the Citizens Jury[®] on Minnesota Property Tax Reform. This means you have agreed to come to **Room 15 at the State Capitol in Saint Paul on Monday, August 2, 1999, at 8:00 AM**. If a Juror does not arrive, we may select you to take his/her place and participate for the week. If the full Jury is seated by 10:00 AM, we will not need you on the Jury and you can leave at that time, although you are free to stay and listen to the presentations, if you so desire.

If you are seated on the Jury and participate in the full week of hearings you will receive a \$500 stipend on Friday. If the full Jury is seated and you are therefore dismissed, we will pay you a \$50 stipend before you leave on Monday morning.

The Jefferson Center is working with the Minnesota Department of Revenue to conduct this Citizens Jury project. This project is being conducted to hear what the citizens of Minnesota truly want done regarding property tax reform. As a juror, you will be asked to give recommendations to the Department of Revenue and the Governor's Office regarding the direction of property tax reform in the state.

The jury will meet Monday August 2 through Friday August 6, from 8:30 AM to 4:30 PM each day. The hearings will take place Room 15 of the State Capitol in Saint Paul. Continental breakfasts, lunches, and snacks will be provided for you throughout the week. Enclosed you will find a summary sheet of what to expect for the week, a parking pass, a map to the project site, as well as a map of the Capitol.

The Jefferson Center will be in touch with you prior to the week of the Jury to answer any questions you may have as well as to confirm your participation. Please feel free to contact us in the meantime, especially if you have any dietary or health concerns we should be aware of for the week. Also, if any problems arise and you are unable to participate as an alternate, please call us immediately, as we will have to find a replacement for you. Thank you for your interest and time in this project. I look forward to meeting you!

Sincerely,

Keiko Veasey
Project Director

EXPECTATION SHEET FOR JURORS

Citizens Jury[®] on Minnesota Property Tax Reform

COMMITMENT	As a juror, you have agreed to participate in all five days of the Citizens Jury, Monday, August 2 through Friday, August 6, 1999. Sessions will run from 8:30 a.m. to 4:30 p.m. each day.
STIPEND	A \$500 stipend will be paid for the five days of participation. This is intended to compensate for expenses such as time away from work, childcare, transportation and other such expenses. Jurors must attend the hearings for all five days in order to receive the stipend.
MEETING SITE	The hearings will be held in <u>Room 15 in the State Capitol</u> in Saint Paul, MN. A map to the site, as well as a map of the Capitol, are enclosed. The hearings will start promptly at 8:30 am. You may wish to arrive early on the first day to familiarize yourself with the location of the jury.
PARKING	Jurors commuting daily will be able to park at the parking ramp at the Department of Revenue and walk to the Capitol, approximately 4 blocks (see enclosed map). A parking pass for this ramp is enclosed as well as directions to the building. Please contact the Jefferson Center as soon as possible if you have special needs or concerns about walking this distance.
MEALS	Breakfasts, lunches, and snacks will be provided for you throughout the week. Please let us know if you have any dietary needs as soon as possible so that we can make those arrangements.
ATTIRE	Casual dress is appropriate.
GUESTS	The hearings are open to the public each day, so you are welcome to invite guests. We are unable to provide meals for the guests, however. Also, we are unable to care for small children at the hearings.
QUESTIONS	If you have any questions or concerns, please call the Jefferson Center at 612-926-3292.

EXPECTATION SHEET FOR ALTERNATES

Citizens Jury[®] on Minnesota Property Tax Reform

COMMITMENT	As an alternate juror, you have agreed to be available to come to the jury on Monday, August 2 at 8:00 AM. If our jury members are all in attendance, you will be free to leave that morning. If, however, we are missing a jury member and we decide to seat you as part of the jury, you will need to be available and ready to participate for the full week (August 2-6).
STIPEND	If you are not seated as a juror, a \$50 stipend will be paid to you for coming to the jury site on Monday, August 2, 1999. If, however, you are seated as a juror for entire week, you will receive the jury member stipend of \$500 for the five days of participation. This is intended to compensate for expenses such as time away from work, childcare, transportation and other such expenses. If seated, you must attend the hearings for all five days in order to receive the stipend.
MEETING SITE	The hearings will be held in <u>Room 15 in the State Capitol</u> in Saint Paul, MN. A map to the site, as well as a map of the Capitol, are enclosed. The hearings will start promptly at 8:30 am. You may wish to arrive early on the first day to familiarize yourself with the location of the jury.
PARKING	Jurors commuting daily will be able to park at the parking ramp at the Department of Revenue and walk to the Capitol, approximately 4 blocks (see enclosed map). A parking pass for this ramp is enclosed as well as directions to the building. Please contact the Jefferson Center as soon as possible if you have special needs or concerns about walking this distance.
MEALS	Breakfasts, lunches, and snacks will be provided for you throughout the week. Please let us know if you have any dietary needs as soon as possible so that we can make those arrangements.
ATTIRE	Casual dress is appropriate.
GUESTS	The hearings are open to the public each day, so you are welcome to invite guests. We are unable to provide meals for the guests, however. Also, we are unable to care for small children at the hearings.
QUESTIONS	If you have any questions or concerns, please call the Jefferson Center at 926-3292.

THANK YOU LETTER TO POTENTIAL JURORS

month, day, year

Dear,

We recently completed the process of selecting the demographically balanced jury for the Citizens Jury on Property Tax Reform. We are sorry to inform you that you were not chosen to be part of the jury panel.

It is always a difficult process to balance the jury on the six criteria of gender, age, geographic location, race, education, and attitude towards the issue. It was particularly difficult this time because we had such a large number of interested candidates. In the course of selection, we are always saddened at being unable to choose everyone who sent back the form and showed interest in the project.

We thank you very much for your interest in this project.

Sincerely,

Keiko Veasey
Project Director

AGENDA – GLOBAL CLIMATE CHANGE

DAY ONE – Monday, March 18

8:30	<p>Welcome</p> <ul style="list-style-type: none"> • Welcome to jurors • Project overview • Brief history of Jefferson Center and Citizens Jury process • Introduction to staff • Role of jury • Rules of procedure & discussion ground rules • Introduce charge & agenda 	Jefferson Center & Moderators
9:30	<p>Introductions</p> <ul style="list-style-type: none"> • Get to know each other exercise 	Moderators
10:00	<p>BREAK</p>	
10:15	<p>Background Information – BIG PICTURE</p> <ul style="list-style-type: none"> • General Introduction to Global Climate Change • Overview of where global climate change issues are now in the U.S., abroad • Overview of economics – role, assumptions, considerations • Overview of policies and politics • Overview of adaptation and mitigation strategies 	Nancy Kete WRI
11:45	<p>LUNCH</p>	
12:45	<p>Scientific Considerations</p> <ul style="list-style-type: none"> • Key scientific questions • Climate basics, linkage to atmospheric composition, historical variations, reasons for change, range of potential responses • Overview of the range of perspectives • How scientific considerations affect scenarios • Q&A 	Mike MacCracken U.S. Global Change Research Program Fred Palmer Peabody Energy
2:45	<p>Break</p>	
3:00	<p>Scientific Considerations</p> <ul style="list-style-type: none"> • Q and A with both witnesses 	
3:20	<p>Technology Considerations</p> <ul style="list-style-type: none"> • How technology affects potential scenarios • Overview of the range of perspectives • Q&A 	John Novak EPRI
4:15	<p>Juror Check-in, Review, etc...</p>	
4:30	<p>Adjourn</p>	

DAY TWO – Tuesday, March 19

8:30	Review agenda for the day and recap the previous day	
8:45	Economic Considerations <ul style="list-style-type: none">• How economic considerations affect scenarios• The role of economic considerations in global climate change scenarios• Overview of the range of perspectives• Q&A	Skip Laitner EPA
9:45	BREAK	
10:00	Potential Impacts (positive and negative) generated by global climate change and their related economic & social costs <ul style="list-style-type: none">• More detailed presentation: Mid-Atlantic Regional Climate Change Assessment Project• Potential impacts on ecosystems and people in Mid-Atlantic regions• Q&A	Ann Fisher Pennsylvania State University
11:00	Jury Discussion <ul style="list-style-type: none">• Brief discussion of considerations and impacts	Moderators
11:30	LUNCH	
12:30	How uncertainty impacts choices & policy decisions Overview of general policy directions	Mike MacCracken U.S. Global Change Research Program
1:15	Mitigation Strategies <ul style="list-style-type: none">• Describe specific strategies• Review costs and benefits of each strategy• Both domestic and international• Q and A	Skip Laitner EPA James Ekmann National Energy Technology Lab
3:45	Jury discussion	
4:15	Juror Check-in, Review day, Preview tomorrow, etc...	
4:30	Adjourn	

DAY THREE – Wednesday, March 20

8:30 Review agenda for the day and recap the previous day

8:45 Adaptation Strategies

- Overview
- Describe specific strategies
- Review costs and benefits of each strategy
- Q and A

Joel Smith
Stratus Consulting

9:35 Vision Advocates

The jury will hear from advocate witnesses each presenting a scenario (i.e., what the witness believes likely will happen), and a set of strategies and action/policy steps (if any) to address their particular scenario, to form a holistic **vision and plan**. As a whole, the set of advocate witnesses from this day will present a wide range of scenarios as well as a range of specific strategies and actions or policy steps.

Each 'vision' presentation section will consist of a 30 minute presentation, then 10 min Q&A

There will be a discussion section following each vision presentation. In every discussion section, the jury will discuss:

- What's compelling about the scenario portion of this vision?
- What's not compelling?
- What impacts (positive & negative) of this scenario are most notable or of most concern?
- What is appealing or not appealing about the proposed action/policy steps and strategies?
- Other discussion

Ken Colburn
New Hampshire
Dept of
Environmental
Services

Roger Duncan
Austin Energy

Myron Ebell
Cooler Heads
Coalition

J. Drake Hamilton
Minnesotans for an
Energy Efficient
Economy

Eric Holdsworth
Edison Electric
Institute

Patrick Atkins
Alcoa

11:50 LUNCH

12:45 Vision Advocates (continued)

4:00 Panel of advocate witnesses

Witness Panel

4:30 Juror Check-in, Review day, Preview tomorrow, etc...

4:45 Adjourn

DAY FOUR – Thursday, March 21

8:30 Review agenda for the day and recap the previous day

8:45 Continue Initial Deliberations

Moderators

12:00 LUNCH

1:00 Begin Final Deliberations

Moderators

4:30 Adjourn

DAY FIVE – Friday, March 22

8:30 Review agenda for the day and recap the previous day

8:45 Continue final deliberations and finish initial report

Moderators

10:30 Review and edit initial report

**Jefferson Center
staff**

11:30 Evaluations by jurors

12:00 LUNCH

1:30 Juror debrief with moderators

Moderators

2:00 Prepare for Wrap Up Session

2:30 Wrap Up Session – jurors present initial report
Q&A with audience

4:00 Juror thank you reception

4:30 Adjourn

AGENDA – METRO SOLID WASTE

DAY ONE – Monday, June 18

8:30	Welcome <ul style="list-style-type: none"> • Welcome to Jurors • Project Overview • Brief History of Jefferson Center and Citizens Jury process • Role of Jury • Rules of procedure & discussion ground rules • Introduce Charge & Agenda 	Comm. Dick Stafford Doug Nethercut Moderators
9:30	Introductions <ul style="list-style-type: none"> • Introduction to staff • Get to Know Each Other Exercise 	Moderators
10:30	BREAK	
10:45	Background Information – BIG PICTURE <ul style="list-style-type: none"> • General Introduction to issue • Introduction to major terms • What is solid waste? • How much is produced? • Introduce each management practice 	Art Dunn
12:00	LUNCH	
1:30	Values & Principles <ul style="list-style-type: none"> • Introduce & define values • Discuss & add to list, if necessary • Prioritize values 	Moderators
4:00	Juror Check-in, Review, etc...	
4:30	Adjourn	

DAY TWO – Tuesday, June 19

8:30	Review agenda for the day and recap the previous day	Moderators
8:45	Waste Management Practices – detailed presentations	Tom Osdoba Dan Krivit Judy Purman
8:45 – 9:15	• Reduction & Reuse (20 min pres + 10 min questions)	
9:15 – 9:45	• Recycling	
9:45 – 10:15	• Composting	
10:15	BREAK	
10:30	Waste Management Practices (continued)	Carl Michaud Mike Ayers
10:30 – 11:00	• Resource Recovery	
11:00 – 11:30	• Land disposal	
11:30	LUNCH	
12:30	Discuss Waste Management Practices	Moderators
	• Discuss mgmt practices	
	• Evaluate each one, based on values	
	• Develop ‘rank order’ for mgmt practices	
2:00	BREAK	
2:15	Detailed Background Information	Zack Hansen
	• Current law (hierarchy)	
	• What currently happens to waste? (specifically in TC-metro area)	
	• Current infrastructure and facilities	
	• Who does what?	
	• Legal issues	
	• Other issues	
3:00	Discussion of current situation	Moderators
	• What’s good?	
	• What’s bad?	
	• Perhaps evaluate based on values	
	• Other	
4:00	Juror Check-in, Values check, Review day, Preview tomorrow, etc...	Moderators
4:30	Adjourn	

DAY THREE – Wednesday, June 20

- 8:30 Review agenda for the day and recap the previous day Moderators
- 8:45 Present three options for addressing solid waste issues in the metropolitan area. Three options will be presented as 'starting points.' The jury will not be confined to simply these three strategies. Rather, these three strategies will help the jury to understand the issues, appreciate how the dimensions can be inter-connected, and be aware of the complexity of the issue.
- 8:45 **OPTION 1**
- 8:45 – 9:15 Presentation & Description **Susan Hubbard**
- 9:15 – 9:30 Counter perspective **Jim Bosch**
- 9:30 – 10:15 Discussion and Evaluation Moderators
- 10:15 BREAK
- 10:30 **OPTION 2**
- 10:30 – 11:00 Presentation & Description **Susan Haigh**
- 11:00 – 11:15 Counter perspective **Chuck Wegner**
- 11:15 – 12:00 Discussion and Evaluation Moderators
- 12:00 LUNCH
- 1:00 **OPTION 3**
- 1:00 – 1:30 Presentation & Description **Julie Ketchum**
- 1:30 – 1:45 Counter perspective **Barry Schade**
- 1:45 – 2:30 Discussion and Evaluation Moderators
- 2:30 BREAK
- 2:45 Panel Discussion of all three options **Advocates**
- 4:00 Juror Check-in, Values check, Review day, Preview tomorrow, etc... Moderators
- 4:30 Adjourn

DAY FOUR – Thursday, June 21

- 8:30 Review agenda for the day and recap the previous day Moderators
- 8:45 Business waste reduction & recycling programs **Paul Kroening**
- 9:00 Continue Initial deliberations on question #2 Moderators
**(Resource
Witnesses Available)**
- 10:30 BREAK
- 10:45 Continue deliberations, develop solid waste management strategy
Deliberation on question #3 (Discuss preferred tools and actions)
- 12:00 LUNCH
- 1:00 Begin Final Deliberations Moderators
- Revisit initial recommendations
 - Revise, amend, or add to initial recommendations
 - Review value priority
 - Review rank of presented options
 - Continue to develop/refine recommended strategy & tools
- 4:15 Juror Check-in, Review day, Preview tomorrow, etc...
- 4:30 Adjourn

DAY FIVE – Friday, June 22

- 8:30 Continue and complete final deliberations (break as needed)
- 10:30 Review initial report JC staff & jurors
- 11:30 Evaluations by jurors
- 12:00 LUNCH
- 1:30 Juror debrief with moderators
- 1:30 Prepare for press conference
- 2:30 Issue Initial Report at Press Conference
- 4:00 Juror thank you reception
- 4:30 Adjourn

AGENDA – MINNESOTA PROPERTY TAX

DAY ONE – Monday, August 2nd

8:30 Welcome (Room 15 – State Capitol)

- Welcome to Jurors
- Project Overview: Why and how the Jefferson Center was contacted for this project. What is the overall reform plan? How does this project fit in?
- Brief History of the Jefferson Center and Citizens Jury process
- Role of the Jury
- Rules of Procedure & Discussion Ground Rules
- Introduce Charge and Agenda

Matt Smith

Matt Smith

Doug Nethercut

9:30 Introduction

- Introduction to staff
- Get to Know Each Other exercise

10:30 BREAK (move to Department of Revenue – Skjestad Room)

10:45 Values Exercise

12:00 LUNCH

1:00 Revenue System Overview (state level revenue – big picture)

Peggy Ingison

1:30 Tax Principles Identification and Definition

- Exercise and Discussion about Tax Principles
- “Fill in the Gaps” with tax expert

Hal Lofgreen

4:00 Juror Check-in, Review, Evening plans, etc...

4:30 ADJOURN

DAY TWO – Tuesday, August 3rd

Department of Revenue – Skjestad Room

8:30 Review Agenda for the day & Recap the previous day

8:45 Background information on local governments (Who does what? Who pays? Who benefits? Where does the money come from?)

- City/Township
- Counties
- Schools
- Metro/Regional

Jody Hauer

9:30 BREAK

9:45 Background information of the different types of taxes and other funding/revenue sources available (or possibly available) to local governments

- Property Tax
- Local Sales Tax
- Local Individual Income Tax
- Fees and Charges
- Intergovernmental Aid

Hal Lofgreen

10:45 Advocate Witnesses (How *should* local governments be funded? How would these funding options affect each type of local government?)

- | | |
|---------------|--------------------------|
| 10:45 – 11:00 | • Property Tax – Pro |
| 11:00 – 11:15 | • Property Tax - Con |
| 11:15 – 11:30 | • Local Income Tax – Pro |
| 11:30 – 11:45 | • Local Income Tax – Con |

Art Roemer

Duane Benson

Marlowe Hammerston

Beth Kadoun

11:45 LUNCH

12:45 Advocate Witnesses (continued)

- | | |
|--------------|---------------------------------------|
| 12:45 – 1:00 | • Local Sales Tax – Pro |
| 1:00 – 1:15 | • Local Sales Tax – Con |
| 1:15 – 1:30 | • Fees & charges in lieu of ptx – Pro |
| 1:30 – 1:45 | • Fees & charges in lieu of ptx – Con |
| 1:45 – 2:00 | • Increased State Aid – Pro |
| 2:00 – 2:15 | • Increased State Aid – Con |

John Moir

Rep. Ron Abrams (R)

Malcolm McDonald

Rep. Ann Rest (DFL)

Tim Flaherty

Glen Dorfman

2:15 BREAK

2:30 Panel of Advocate Witnesses (local government reps (**Gary Carlson, Jim Mulder, Bob Meeks**) will join the panel and each make a short statement to start the panel)

3:30 Initial Jury Deliberation of question #1

5:00 ADJOURN

DAY THREE – Wednesday, August 4th
Department of Revenue – Skjestad Room

8:30 Review Agenda for the day & Recap the previous day

8:45 Background information on the current Minnesota property tax system

- Classes & Rates
- Levy Determination Process **Gordon Folkman**
- Assessment & Valuation **Tom May**
- State Role
- Major Programs – Refund Program, Property-Specific Credits

10:15 BREAK

10:30 Jury discussion of the strengths and weaknesses of the current property tax system.

- Identify strengths
- Identify weaknesses
- Rate the current system based on the tax principles

11:30 LUNCH

12:30 Advocate witnesses for changing the current property tax system.

- | | | |
|--------------|---|---|
| 12:30 – 1:00 | • Unified System | Dan Salomone
Jack Horner
Tom Hesse |
| 1:00 – 1:30 | • Classified System | Peter McLaughlin
Brian Rusche |
| 1:30 – 1:45 | • Valuation: Limited Market Value – Pro | Dick Wray |
| 1:45 – 2:00 | • Valuation: Limited Market Value – Con | Jim Girard |
| 2:00 – 2:15 | • Valuation: Acquisition Value – Pro | Dick Wray |
| 2:15 – 2:30 | • Valuation: Acquisition Value – Con | Dorothy McClung |
| 2:30 – 2:50 | • Other Reform Ideas – (site-value taxation)
(land/space consumption-based taxation) | Mark Haveman
John James |

2:50 BREAK

3:05 Panel of Advocate Witnesses

4:00 Juror Debrief & Discussion of Property Tax System Reform Ideas

5:00 ADJOURN

DAY FOUR – Thursday, August 5th

Department of Revenue – Skjestad Room

8:30 Review Agenda for the day & Recap the previous day

8:45 Panel of Resource People for jurors to ask questions of (available until lunch)

9:30 Initial Jury Deliberations on question #2

- Develop recommended improvements to the property tax system
- Connect recommendations to the Tax Principles.

10:30 BREAK

10:45 Continue Initial Deliberations of question #2

11:30 LUNCH

12:30 Begin Final Deliberations

- Re-visit initial recommendations
- Revise, Amend, or Add to initial recommendations

4:30 ADJOURN

DAY FIVE – Friday, August 6th

Department of Revenue – Skjestad Room

8:30 Continue & Complete Final Deliberations (break as needed)

11:00 Review Initial Report

12:00 Evaluations by Jurors

12:30 LUNCH

1:30 Juror Debrief with Moderators

1:30 Prepare for press conference

2:00 Issue Initial Report at Press Conference **(Room 15 – State Capitol)**

4:30 ADJOURN

LETTER TO WITNESS

month, day, year

Name
Title
Organization
Address
City, ST ZIP

Dear Title LastName,

Thank you for agreeing to participate as a witness presenter for the Citizens Jury[®] on Minnesota Property Tax Reform. This is an exciting and unique project that will help to guide the direction of reform in the state of Minnesota.

The Citizens Jury will be held August 2-6, from 8:30 AM to 5:00 PM in the Skjegstad Room at the Minnesota Department of Revenue. The opening and closing sessions of the jury will take place in Room 15 of the State Capitol. You are scheduled to participate in the project for the following approximate times, in the following capacities:

Wednesday, August 4	1:00 – 1:15 PM	Presentation
Wednesday, August 4	3:05 – 4:00 PM	Panel Discussion

Your presentation should outline the argument for _____. You will be allowed **10 minutes** of presentation, followed by a **5 minute** question and answer session with the jurors. Please prepare your presentation with this time limit in mind as the time limit will be strictly enforced. The panel will consist of the “advocate witnesses” for the section preceding the panel. I have included a draft version of the agenda for your information. If possible, please try to arrive early in case slight adjustments to the agenda are necessary.

We plan to have two witness presenters in this section, each to present the argument from a slightly different perspective. We are currently pursuing _____ to be the second presenter in this section. I will contact you as soon as we confirm the second presenter.

We will have audio-visual equipment (screen, projector, overhead, etc...) for your use. For our planning purposes, please let us know what equipment you will need for your presentation by July 28. The Jefferson Center kindly requests that you prepare handouts of all overheads and/or slides that you will use in your presentation. Please prepare and three-hole-punch 30 copies of any handout.

In addition, you must complete the enclosed “Advocate Witness One-Pager.” This one-page sheet is intended to provide the jurors with an outline of your argument. Each Advocate Witness will prepare a one-pager. Please return this completed form to the

Jefferson Center no later than **Thursday, July 29**. You may re-type the form, but please retain the general format so that all the Advocate Witness One-Pagers are comparable. In addition, it must be no longer than **one page**. Please call the Jefferson Center if you have any questions or difficulties with this. You may return it to the Jefferson Center via mail, fax (612.926.3199), or e-mail (keiko@jefferson-center.org).

I have included a sheet with "Witness Guidelines" for your information. Please review these guidelines carefully and keep them in mind when preparing your presentation. These guidelines have been developed specifically for the Citizens Jury process to help you make your presentation to the jurors as effective as possible.

The agenda that is included is still in draft form and is included for your information and planning purposes only. The final agenda and witness list will be made public on Wednesday, July 28.

Your participation will greatly help to paint a more complete picture of the property tax system and its related issues. Thank you very much for your commitment of time to this project. Please feel free to call the Jefferson Center if you have any additional questions and/or concerns about this Citizens Jury project.

Sincerely,

Keiko Veasey
Project Director

WITNESS FORM (EXAMPLE, OPTIONAL)

Advocate Witness One-Pager: Funding local levels of government

Property Tax - PRO

Advocate Witness Name: _____

1. Why *should* local levels of government be funded by the above source?

2. How does this funding option affect each level of local government (positively *and* negatively)?

City/Town:

County:

School:

Regional:

WITNESS GUIDELINES

Presentations

The presentations are a very critical part of the Citizens Jury[®] project. It is a way for the jurors to learn about the issue and the different perspectives surrounding the topic.

There is a lot of information to be learned and the jurors will hear from many witnesses and each individual presentation is very important to the process. A few things to remember when making your presentation:

- Maintain eye contact with the jurors
- Speak loudly and clearly (there may be jurors that are hard of hearing)
- Be personable
- Stay on task to the topic of your part of the agenda
- Most of all, have fun! This is a fun and exciting week, not only for the jurors but for you the witnesses as well.

Timing

Know your time allotment and keep your presentations within that time frame. All presentations are timed and extra time is not allowed. If you go over your allotted time, you will be cut off.

Language

Use language that everyone, no matter what his or her background, can understand. Do not use “jargon” or acronyms unless you define precisely what the term means. Keep in mind that many of the jurors are unfamiliar with the topic, and may not understand some of the vocabulary associated with the issues. Speak clearly and concisely, to avoid confusion.

Questions

There will be time allotted for questions from the jury. Try to keep answers brief and to the point. This will ensure that several jurors will have the opportunity to ask questions.

Materials

Audio-visual equipment (screen, projector, overhead, etc...) are available for your presentation. Please let the Jefferson Center know in advance if you need audio-visual equipment. If you are planning on using overheads, limit the amount of text on them, as it makes them difficult to see and read. When using charts or graphs as a part of your presentation, it is best to keep them as simple as possible to avoid confusion. Keep all materials simple and straightforward, so that they will be useful to the jurors after your presentation. Please make copies of all overheads as handouts as well. When preparing handouts, please make at least 30 three-hole-punched copies of each.

JUROR PERSONAL COMMENT SHEET

Citizens Jury® on
Global Climate Change

JUROR'S PERSONAL STATEMENT

This is an optional exercise where you as a juror have the opportunity to record your personal opinions on any part of the project: the process, the staff, the witnesses, the issues or other opinions you wish to express or comments that you would like to make.

Your statement will be published as part of the final report, as long as you are willing to sign your name to it and represent it as solely your views and not those of the Jefferson Center or other jurors.

Please keep your statement to 100 words or less.

Signed: _____

Name: _____
Please Print

Please check one: do not edit
 edit for spelling and grammar only
 edit for spelling, grammar and intent

EVALUATION FORM FOR JURORS

Citizens Jury on Global Climate Change

1. In general, how do you feel about the Citizens Jury on Global Climate Change now that you have completed the project?

- _____ Very satisfied
- _____ Satisfied
- _____ Neutral
- _____ Dissatisfied
- _____ Very dissatisfied

Explain your answer:

2. How do you feel about different parts of the project?

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Introductory Session	_____	_____	_____	_____	_____
Day 1 – Background/overview	_____	_____	_____	_____	_____
Days 1 & 2 – Considerations <i>(scientific, technology, economic)</i>	_____	_____	_____	_____	_____
Day 2 – Impacts & Uncertainty	_____	_____	_____	_____	_____
Days 2 & 3– Strategies <i>(adaptation & mitigation)</i>	_____	_____	_____	_____	_____
Day 3 – Advocate Visions	_____	_____	_____	_____	_____
Deliberations	_____	_____	_____	_____	_____

Additional Comments:

3. One of our aims is to have the Jefferson Center staff conduct the project in an unbiased way. How satisfied are you with their performance in this regard?

(Note: Jefferson Center staff includes _____)

- _____ Very satisfied
- _____ Satisfied
- _____ Neutral
- _____ Dissatisfied
- _____ Very dissatisfied

4. How do you feel about the performance of the following personnel?

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Moderators:					
Name	_____	_____	_____	_____	_____
Name	_____	_____	_____	_____	_____
Jefferson Center staff	_____	_____	_____	_____	_____

Any comments that you would like to make concerning the staff?

5. How do you feel about the time allotted to different parts of the project? Did you have enough time to do the job properly?

	Not enough time	Adequate amount of time	Too much time
Introductory Session	_____	_____	_____
Background Information	_____	_____	_____
Considerations	_____	_____	_____
Impacts	_____	_____	_____
Strategies Overview	_____	_____	_____
Advocate Visions	_____	_____	_____
Juror Discussions	_____	_____	_____
Deliberations	_____	_____	_____

6. How do you feel about the witness presenters? Do you have any comments about specific presenters, the witnesses as a whole, or about the information that was presented to you?

7. Was there any information or witness that was particularly helpful or useful to your understanding of the issues?

8. Was there any information or witness that you felt was not useful or was unnecessary to your understanding of the issues?

9. Was there any part of the project which was particularly satisfying or well done?

10. Was there any part of the project which was particularly dissatisfying or poorly done?

11. Are there any suggestions in the proceedings which you would recommend? Any additional comments? (you may use the back side of this paper, if necessary)

Name (optional): _____

DISCUSSION GROUND RULES

Listen with care.

Make an effort to understand the key points and needs of others. Limit interruptions. Make a genuine effort to understand others before seeking to get them to understand you.

Maintain focus.

Focus is on issues not people. (Be tough on the issue and easy on the individual. Direct anger to issues, not people.) Understand and focus on the significant. Limit digressions; keep focused; minimize stories unless they are pertinent to the issues discussed.

Maintain a positive attitude.

Assume good intent; do not look for hidden agendas. If the intent of another party is not clear, ask questions and seek to clarify their meaning.

Practice brevity and clarity.

Speak clearly and concisely. Unless requested, strictly limit discussion of an issue or item to as short a statement as possible. In other words, no speeches.

Participate fully.

Participate and contribute to the discussion but not to dominate through interruptions or long-windedness. Express views rather than remaining silent when in a disagreement with meeting conclusions.

Disagree positively.

Disagree whenever needed but do so in a positive way. Be a problem solver by suggesting a better approaches or solutions. Adopt a cooperative attitude; look for opportunities to make changes that work for all parties.

Additional Ground Rules

RULES OF PROCEDURE

To maintain the integrity of the Citizens Jury[®] process, the Jefferson Center staff asks that the following rules be observed:

1. Regarding contact between the jurors, witnesses, and others:
 - We request that contact between jurors and those with an interest in the issue(s) are limited to casual and brief discussions.
 - Jurors' names will be made public before the hearings. After the jurors' names are announced, we respectfully request that jurors not be contacted by anyone connected with the issues. This is necessary to prevent the jurors from being overwhelmed with advice from all sides.
 - It is appropriate for the jurors to discuss the process and the topics under consideration with family members, but they should refrain from discussing with others.
2. The hearings are *not* conducted using rules of procedure borrowed from the legal system. Considerable latitude will be given to the witnesses and advocates to make their statements. The aim of the moderators will be to ensure fairness, to maintain decorum, and to see that the designated topic is adhered to within broad limits.
3. During the questioning of witnesses and advocates, jurors are asked to keep questions brief, relevant, and respectful in tone. Jurors should keep their questions to one minute, while witnesses and advocates will be asked to keep their answers to three minutes or less.
4. The hearings are public and open to an audience; the audience will not be allowed to ask questions or make comments during the proceedings, except to the Community Liaison. If for any reason the presence of a large or unruly audience inhibits the jurors in their work, the moderators will have the right to ask some or all of the audience to leave the room. A suggestion/comment box will be available for use by the public.
5. The audience will be asked to conduct itself as though at a legal proceeding, remaining quiet and making no attempt to influence the jurors through applause, laughter, etc.
6. The audience will be limited in size to those who can comfortably be seated in the hearing room. Please keep all cellular phones and pagers turned off during the hearings.