

Facilitators' Guide

Sustainable Racine
Vision Council Delegations

February, 1998



Note for all Members of the Facilitator Teams:

The meeting you will be facilitating--whether for the Vision Council Delegates or the Community Organizing Committee-- is different from the Forums you led on January 31 in a number of respects. Most importantly, the people coming to these meetings have ongoing work to do together, and need to develop some sense of themselves as a group. Some of them will also come with notions about what they would like to see happen in the meeting.

So... while we have provided you with a Guide, and we have designed a meeting structure and process for each group that we think will help them do their work, your job is to be much more flexible and open to change than you were for the Forums. Keep the purpose of the meeting in mind, and keep the purpose of each section of the meeting in mind, but in an extreme case, be prepared to get out of the way and let the group roll on.

Please note that this Guide looks like the January 31 Guide in some ways, but it has one **major** difference: There is no verbatim text. The right column is an expanded outline describing what you need to accomplish. Please don't read it aloud to participants; work from it in your own words. The left column contains directions, instructions and advice for both recorder and facilitator.

What remains the same are the keys to effective facilitation:

- Stay in your role as facilitator (resist the urge to be a participant)
- Maintain your neutral stance
- Respect all members of the group
- Work for balance in participation
- Serve the needs of the group

And for recorders:

- Print large
- Use a short version of people's own words
- Write down something for each speaker
- Number and date your pages
- Maintain your own neutrality in recording, posture, gesture, and tone

Have fun!

P. S. The next page presents the agenda participants will use during your meeting. Your Guide begins on page 3.



Sustainable Racine
February, 1998

Vision Council Delegates
Proposed Participants' Agenda

Purpose of the Vision Council: To create the guiding vision and goals for the Racine area sustainable future. Members of the Vision Council will be meeting between now and June to integrate the ideas from 23 sites and a substantial number of community organizations.

Purpose of this meeting: To prepare for effective participation in the Vision Council.

7:00 Opening

Welcome
Introductions
Statement of purpose
Review of proposed agenda
Proposed conversations guidelines

Review results from the January Forums
Categories for Treasures and Rainbows
Categories for Opportunities (Blue, Pink, Yellow, Green card ideas)

Prepare brief report for the Vision Council

Discuss suggestions for the Vision Council process

Determine next steps
Action steps, with specific responsibilities
Additional meeting(s) and proposed agenda

9:00 Adjourn

Vision Council Delegates Facilitators' Guide

Before the evening of your meeting:

1. If you can, call the other members of your team and make plans for how you will handle the facilitation and recording.
2. Read this guide carefully so that you can form a mental picture of each part of the meeting. This guide is less detailed than the guide for the January 31 section. There is no verbatim section, for example, but there are instructions about what you are expected to do at each section of the meeting. If you have questions in advance, call Ron Thomas at 632.6440, or call Rona Roberts or Steve Kay at 606.231.8308.
3. If you want a refresher course on key principles and practices associated with each section, some review in the green *RKI Facilitators' Working Guide* may help. When appropriate, the relevant section of the *Working Guide* is noted in the left column beside the meeting section it matches.

6:00 - 7:00 Preparation

The Sustainable Racine liaison will bring these supplies to the site:

Flip chart easel and pad

Markers

Tape

Name tags

Participants' agendas

Sign-in sheets

"Proposed Conversation Guidelines" (prepared flip chart sheet from January 31)

1. Greet your fellow team members.
2. If you have not already done so, decide who will facilitate each section, and who will record at the appropriate points.
3. Arrange chairs (and tables, if present) in a small semi-circle, or a small hollow-square. Your meeting should have no more than six participants. Arrange for the flip chart to be visible, and make sure the facilitator has enough room to stand and move around as necessary.
4. Hang the "Proposed Conversation Guidelines" prepared flip chart sheet (from January 31) in a visible location

5. Prepare flip charts with the following information in large print, dark ink (black, blue, purple, dark green; do not use red or orange because they do not “travel” as far visually):

A. For the front page, print or write “Welcome to the Vision Council Delegation” in very large letters, using several colors if you wish.

B. Skip a page. On the third page, print the following in large letters:

Introductions

Name

Why I came to the Forum

Why I came back to this meeting

One local or community issue or activity I have been most interested in or involved in

Single issue I care the most about

C. On page four, print in large letters:

Purpose for this Vision Delegation meeting:

To prepare for effective participation in the Vision Council

D. On page five, print in large letters:

Additional conversation guideline:

7. Aim to make decisions by consensus, which means something all of us can live with and defend later, even if it is not our first choice. If consensus is not possible in a reasonable amount of time, we will vote.

6. Decide how to distribute Participants’ Agendas and name tags. Either put them on chairs before people arrive, place them in a stack and ask people to take one as they come in, or hand them to people as you greet them at the door.

7. Figure out how to handle signing in. Either have people sign in as they arrive, or pass a sign-in sheet around during the session.

8. Aim to have all arrangements complete by 6:40, if possible, so that you can greet people as they arrive and help make them feel welcome.

7:00 - 7:20 Section One: Opening, Introductions, Purpose, Agenda Review, Conversation Guidelines

A great deal of the tone of the meeting will be determined by the set up and opening. A short section that underscores opening well begins on page 45 of the green *RKI Facilitators' Working Guide*.

The purpose of the opening section is to set a climate of welcome and efficiency for work. A good climate is more likely when people use introductions to get to know each others' experiences and interests, and when the group takes responsibility to agree on an agenda and conversation guidelines as the structure for its work.

Welcome

1. Thank people for coming back.
2. Let them know some of the results so far: About 1,000 people met together on January 31. At least another thousand watched the live Electronic Town Forum on cable that morning. Several hundred written surveys have already been received.
3. Share some of your own enthusiasm and excitement about the Sustainable Racine project and process.

Introductions

1. Introduce yourself and the team. Make it clear you are volunteering for this work.
2. Ask participants to introduce themselves. Ask each person to say her/his name and to add a few more personal facts.

Show page 3 of your flip chart, and read the information to the participants.

- Name
- Why I came to the Forum
- Why I came back to this meeting
- One local or community issue or activity I have been most interested in or involved in
- Single issue I care the most about

Since the Vision Council Delegates are going to need to work together, they may be inclined to spend a bit of extra time talking with each other during the introductions. Watch the clock. As long as they seem to be on track for finishing their introductions by about 7:20, don't intervene. If they seem likely to run later than that, remember the rule about not saying to participants that they need to rush, but do take some actions. For example, after one person finishes speaking, or at a convenient break in the conversation, you could ask, "Would you like to continue investing this kind of time in the introductions? We can do it if we adjust the schedule a bit. It's up to you."

If people want to take more time, you can adjust the amounts of time available for other sections.

Show the purpose statement on page 4 of the flip chart.

Statement of purpose

1. Explain the purpose of this meeting of the Vision Delegates:

To prepare for effective participation in the Vision Council

You may want to make some or all of the following points:

- A. The Vision Council's work is to create the guiding vision and goals for the Racine area sustainable future. Members of the Vision Council will be meeting between now and June to integrate the

People should have a schedule for Vision Council meetings in their packets.

Dates and Times:

Saturday, March 14, 8:30 a.m.--noon

Thursday, March 26, 7-9 p.m.

Thursday, April 23, 7-9 p.m.
(Community progress report to 23 sites)

Thursday, May 7, 7-9 p.m.

Saturday, May 23, 8:30 a.m.--noon

ideas from the 23 Forum sites and from a substantial number of community organizations.

- B. Like all the other parts of the Sustainable Racine process, the Vision Council is unique. In other words, there is no plan or pattern from some other place that can simply be followed. It is being invented here for the first time.
- C. Vision Council delegates will be helping with the invention by contributing ideas for the Vision Council’s structure and process during this meeting.

- 2. Distinguish the Vision Council from the meeting the local Community Organizing Committee is holding in your same building at the same time the Vision Council delegates are meeting.

You may want to make some or all of the following points:

- A. The focus of the Vision Council will be geographically broad, including the entire Racine area. In contrast, the Community Organizing Committees will focus on projects they can undertake in local portions of the Racine area.
- B. The Vision Council will be working to produce one integrated vision and set of goals for the whole Racine area. In contrast, each Community Organizing Committee at each of the 23 Forum sites may choose to work on a specific, different project.
- C. The Vision Council will be working on a planning product, and then will disband in June. In contrast, each Community Organizing Committee will be working on implementing one or more action projects, and may continue indefinitely.

Record any proposed changes on the flip chart. Use a short version — the “gist” — of each participant’s own words. Write down something for each person who speaks.

Do be responsive if anyone in the group wants a change, but check out the proposed change with the whole group. Whether there are proposed changes or not, you do not need to treat agenda approval as a big deal. You can handle it with a light touch, by saying such things as “Could you nod your heads if you think this is the right agenda for our work tonight?” or “Show me your hands if you are ready to get to work on this agenda.”

It is unlikely that anyone will want to modify the agenda. But if it happens, use your basic facilitation principles (neutrality, openness, giving process cues) to help the group work toward a satisfactory agreement as efficiently as possible.

Review the proposed agenda

1. Ask people to look at the agenda they have in hand. Explain that this is a proposed structure to meet the purpose of the meeting. Describe each of the parts briefly (based on your understanding from having read through this Guide).
2. Ask for proposed modifications.
3. Ask for agreement to use the agenda, either as originally proposed, or with modifications, if any were proposed.

Proposed conversation guidelines

Show the prepared sheet of guidelines from the Forum, and page 5 of your hand written flip chart, which presents the additional guideline (number 7) on consensus decision making.

1. Propose that the group use those from the Forum, with one additional guideline that relates to how the group will make joint decisions.

Use the same approach to getting agreement on the guidelines that you used during the January 31 forums. (See pages 12-13 of the January 31 Facilitator Guide for a refresher.)

2. Ask for proposed modifications, and then for agreement to use them.

7:20 - 8:00 Section Two: Review the results from the January 31 Forum at your site.

Sections of the *RKI Facilitators' Working Guide* that may provide some background: "Generating Lots of Good Ideas" on page 48 and "How to move from lots of ideas to specific decisions" on page 54. You may also want to scan "Consensus decision-making: It's not unanimity and it's not impossible" on page 66.

The purpose of this section is to give the Vision Delegates some in-depth experience with the whole set of ideas generated at the January 31 Forum at your site, and to do some initial organizing of all these ideas into some categories the Vision Delegates can work with and share with the whole Vision Council.

1. Give people five minutes to review the printed material.

Treat the Treasures and Rainbows as one single category. Both represent good things people want to be true of the Racine area in future generations. They do not need to be handled separately to prepare for the Vision Council work.

One way to get started is simply to ask “Does anyone see Treasures and Rainbows that are related to each other and should be grouped as a cluster?” Take suggestions for things to be placed together, and as clusters begin to emerge, ask people “Does anyone have a name in mind that we can assign to this cluster?”

Don’t worry about getting everything in completely neat clusters. You can put one item in more than one place, if needed. You can also have a “leftover” or “miscellaneous” cluster if needed.

Record suggested categories, and record the Treasures and Rainbows within each category. You may be able to find short cuts for this, by tearing and taping Treasures and Rainbows to a flip chart sheet, within a cluster, or you may be able to develop a coding system that references a set of the printed materials. Whatever system you use, please be sure someone not at the meeting will be able to understand it well enough to transcribe it and get it ready for Vision Council use.

Remember the recorder slogan: “If it isn’t recorded, it didn’t happen.”

See “Recording Well” on p. 90 of the RKI Facilitators’ Working Guide.

2. Ask the group to identify major categories within the Treasures and Rainbows. Work as a group to find a scheme for organizing the Treasures and Rainbows into manageable clusters. This work is to help these Vision Delegates get a good handle on what happened at your site on January 31, so that they can carry the January 31 ideas forward effectively.

It may be easiest to use the clusters created for Treasures and Rainbows as the categories for all the other work. Try this, and see if it works. If not, modify in any way necessary. If needed, you may have different categories for each type of idea (Treasures/Rainbows, or Opportunities from the blue cards and yellow/pink/green cards.) Ask the group to use its collective judgment to make decisions about the best clustering strategy.

It may also be possible to accomplish some of this work by dividing into teams of two, each working with a different set of ideas.

It is not the facilitator and recorder's job to make these procedural decisions for the group, but it is your responsibility to keep placing questions about these decisions in front of the group so that it can make the decisions effectively.

Record carefully.

If people want to have more conversation at this point and make some choices about what is most important, check the time. If they are within the time frame, or close to it, let them know what still remains to be done and ask them to decide whether they want to do more work with these area-specific ideas at this point.

Record carefully.

3. Repeat the process for the Action Opportunities — the Blue card ideas from groups, and the Yellow, Green, and Pink card ideas from individuals.

4. Identify aspects of the Forum results that are unique or of special concern to this area.

You may simply ask, "Now that you have seen all these ideas, are there some that seem particularly important to this part of the Racine area? Let's list everyone's suggestions, without disagreement, and see what our collective thoughts are about this."

8:00 - 8:40 Section Three: Prepare a brief report for the Vision Council.

The purpose of this section is to give the delegates the opportunity to prepare for a three minute presentation they will make to the Vision Council at its first meeting.

1. Describe the task: to prepare a three minute presentation for the first Vision Council meeting that shows the essence of what happened at your site on January 31. This presentation may be traditional, like an oral report, or it may be creative. It is up to the delegates to decide.
2. Invite delegates to make proposals to each other about the **contents** of the report.

The contents may be obvious from the preceding discussion, but it will also be useful to take suggestions. Use brainstorming rules: Every suggestion counts; no disagreement with any item until the list is complete. Then encourage open discussion of alternatives, and move the group toward closure. If you need a closure system, you could invite people to vote for the top three items, and then see which seven or eight items drew the most support. If you use a voting system, ask people to look at the whole set, once they have voted, to make sure it does include all the group's best thinking. Invite the group to make adjustments if they need to.

Tell them they may use their three minutes in any way they choose — from traditional information sharing to artistic/dramatic presentation.

Encourage them to consider alternatives and to have fun with this, but don't make them feel that they must do something other than a traditional report. Encourage open discussion of alternatives, and then move the group toward closure.

3. Discuss and reach agreement about the **form** for the report.

8:40 - 8:45 Section Four: Discuss suggestions for the Vision Council process

The purpose of this section is to get ideas from delegates about ways to make the Vision Council process successful.

Take the ideas in brainstorm fashion, and record them on the flip chart. There is no need to vote or choose the most important of these ideas.

1. Invite the group to brainstorm suggestions to Sustainable Racine about ways to make the Vision Council process successful. Meeting times and places are fixed. All other aspects of the meetings are open for suggestions. The Vision Council will have about 150 members, and will finish its work in June.

8:45 - 9:00 Section Five: Determine next steps

The purpose of this section is for the Delegates to decide whether they need or want to meet again before the first Vision Council meeting; if they do choose to meet again, they must set up the meeting and determine its agenda.

1. Ask the group whether they feel ready for the first Vision Council meeting. If they do, thank them and adjourn.
2. If the group needs to meet again, ask them to answer these questions:
 - (1) How much time will you need?
 - (2) When can you meet?
 - (3) Where?
 - (4) What will be your agenda?
 - (5) What kind of resources will you need from Sustainable Racine for that meeting (including facilitator and recorder) or can you meet on your own?
3. When planning is complete, thank people warmly for their good work, and adjourn.

Facilitators: After the participants have left, please fill in the facilitators' questionnaire report form, and return them to the Sustainable Racine liaison.

9:00 Adjourn

Recorders: Please make sure all flip chart pages are numbered, dated and in order. Check to make sure internal headings are in place so that someone who did not attend could still follow the results. Label the whole set of flip chart sheets with the site name and number, and the date. Make sure the whole batch go to the Sustainable Racine liaison.
