Make Your Own Facilitators' Guide

Sustainable Racine's "Tool Kit"
for
Vision Council Meeting 4 (May 7)

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The Super-Agenda for Sustainable Racine's Vision Council, Meeting 4
May 7, 7 - 9 PM
(Facilitators arrive at 6 PM)
Starbuck Middle School

Facilitator Meeting Preparation
Esther Letven, Prep session leader

6:00 PM	Facilitators convene in Room 105
6:05	Finish agenda development for your work group's session tonight (get coaching and help as needed)
6:20	Get coaching and practice on working with groups to produce refined goals
6:45	Set up your room appropriately for your work group
6:55	Help welcome Vision Council members

Vision Council Whole Group Assembly

7:00 PM Vision Council Work Session begins: Assemble in cafeteria

- Welcome back to all
- Purpose for tonight's session; place of tonight's session in overall plan
  [Refine goal and vision statements based on community input; prepare three minute presentation for whole Vision Council on May 23]
- Brief recap of April 23 community-wide results

7:10 Work groups go to assigned rooms

Work Groups Convene Individually

[See the rest of this booklet for suggestions on how to build your agenda for the remaining three sections of this work session. Agenda development form is on last page.]

7:15	Individual work groups begin work on improving goals and vision statements
8:40	Work groups plan three minute presentation to whole Vision Council on May 23
8:55	Work groups decide whether further meetings are needed: Any further changes to goal or vision statements must be completed by May 15
9:00	Adjourn directly from work groups

Helpful processes for the May 7 Work Group Session (7:15 - 9:00 PM)

Some (clarifying, we hope) words about agenda building.

In this "Tool Kit" booklet, we provide you with an outline of the categories of work to be done, and time frames for the work, but we do not tell you precisely what to do at each moment, as we were able to do for the public sessions on January 31 and April 23.

We have shown you a "super-agenda" that presents the blocks of time for the whole evening, including the time before you meet with your individual work group.

We believe that you need to consider two further agenda building steps:

(1) You need to build a process guide for yourself, a "facilitator's agenda" that tells you what you are going to do at each point as you work with your work group (7:15 - 9:00.) The last page of this booklet contains a form that is intended to help you complete this process agenda.

2. Based on your custom-tailored facilitator's agenda, you need to produce a short, simple agenda to propose to your work group. Ideally you should produce this proposed agenda on flip chart paper.

Before you work on either agenda, we suggest that you read this booklet, in which we suggest some options for ways to get the work done. You may pick and choose from what we suggest, or create your own approaches.

Don't skip the Conversation Guidelines (though you don't have to harp on them if all your work group members are regulars). This could be the night you need them most.

1. Share your ideas with the group.
2. Encourage other people to speak.
3. Listen with respect to other people's ideas.
4. Aim to create something new together before you leave.
5. Allow the facilitators to keep the meeting on track, including recognizing people to speak, if necessary.
6. Abide by common courtesy: listen without interrupting; no personal attacks; no side conversations; no disrespectful behaviors toward others.
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.

7:15 Open Well

Even though the whole Vision Council will have met briefly in the cafeteria, when the work group moves into its work space, it will be useful to treat it as a second beginning. In order not to lose precious minutes as people "warm up" to the task, prepare a set of energetic, briskly presented opening activities:

1. Welcome people again and thank them for coming.

2. Ask people to introduce themselves.

   If your group has several newcomers or people not familiar with each other, you may want to suggest one thing more that people can say about themselves. If you want to emphasize the personal so people can keep getting to know each other, you could suggest, "Tell us what you would be doing tonight if you were not here." If people know each other relatively well and you want to emphasize the work at hand, you could request, "Please tell us three words that describe your work on the Vision Council so far." Or…you be creative. Avoid asking any question that will embarrass or put someone on the spot.

3. State the purpose for this session -- the tasks to be accomplished. People will have heard this once in the opening session in the cafeteria. They may need to hear it two or three more times.

   Use your own words to describe the two tasks: (1) improving the goal and vision statements, based on community input; and (2) preparing a three minute presentation the group will need to make to the whole Vision Council on May 23.

4. Ask people to remember and work within the seven conversation guidelines.

5. Propose an agenda for the group's work until 9:00 PM.

7:25 Improve Work Group Goal and Vision Statements

Things you need to know:

☛ **Last chance for goal and vision statement improvement:** Unless your group decides to hold a special meeting, this session is people's last chance to work on the goal and vision statements.

☛ **Time frame:** Your group will have about 70-75 minutes to complete work on the goal and vision statements.

☛ **Necessary information from April 23 community sessions:** For your work group only (not for all ten work groups) you will have available:

- ✓ A community-wide total of green and red dots assigned to each goal statement your work group produced.
- ✓ Comments from each site, identified by site.
- ✓ "Questions For Reviewing Your Goals," a useful tool for your work group.
- ✓ The draft Goals Workbook.
- ✓ A memo to the Vision Council from the Vision Stewardship group (the Sustainable Racine committee overseeing the process).

It will help if you get an advance look at the April 23 results that relate to your work group. You will also need to remember all you can about the group and its prior work, if you have worked with this group at previous Vision Council work sessions.

How to develop an organized approach or "internal agenda" (in advance) for your group's work on improving goal and vision statements

1. The first step the group should take, with you, is to assess how much work it needs to do on its vision and goal statements. You can speed through this part of the work by doing an assessment in advance. Then you can make a starting proposal to the group about a way they can allocate their time.

   In order to plan your process agenda, you will need to make some educated guesses about how to answer these questions:

   A. *Does the group have a vision statement? If not, it should produce one for its topic area.*

      If the group has a vision statement and you expect members are satisfied with it, no time need be allocated.

      If they have a vision statement and are likely to want to revise it, you might want to allocate 15 minutes or so.

      If the group has no vision statement and need to write one from scratch, you may need 20 - 30 minutes.

   B. *How much revision and addition do you anticipate for the goals?*

      If you are familiar with the work group, consider how members felt about each goal statement before April 23 and whether they planned to work on them further, regardless of community input. Then consider, as well, the amount of community suggestions for change.

Depending on how much time you anticipate having left after working on the vision statement (should be between 40 and 60 minutes), divide the available time among the goals, based on how much work you expect (guess) they will need. You may want to propose larger amounts of time for those goals for which there are significant competing comments, or which you already know the group finds problematic.

Put clock times on your proposed time allocations and write up a proposed agenda on a flip chart sheet.

As an example, let's invent a mythical group that has a vision statement that is not yet satisfactory, and six goals, three of which drew substantial comment. Your proposed agenda *could* look something like this:

Please note: This sample agenda is only one approach. You will need to use your knowledge of your group, and make some judgments. Maybe your group should consider the goals first and work on the vision last, for example. That is up to you.

Proposed agenda for final work on vision and goal statements:

7:15	Opening, welcome, agenda, purpose, conversation guidelines
7:25	Vision statement revisions (20 minutes)
7:45	Goal 4 (10 minutes)
7:55	Goal 6 (10 minutes)
8:05	Goal 1 (10 minutes)
8:15	Goals 2, 3, and 5 (5 minutes each)

8:30 Look at all goals and the vision statement together and make sure we are satisfied.

8:40 Work on Vision Council presentation

8:55 Decide if we need to meet again

9:00 Adjourn

There are two main reasons for developing the proposed agenda in advance. First, it should help your group start work immediately instead of floundering. Second, it should help you and the group recognize the limitations of the time frame so that you can avoid getting stuck unnecessarily on one goal when you have several others to address.

Whatever agenda you develop, in the first ten minutes, as part of the many steps of opening well, you will want to show the proposed agenda and ask if anyone wants to suggest changes. If so, take the suggestions and work with the whole group to figure out what to do about the proposed changes. If no changes are suggested, you can say, "This will be our agenda for tonight, then." [For drama, if you need some, you can mark out "Proposed" on the flip chart -- with a flourish.]

2. All that long sequence in Number One was about equipping you to make an agenda proposal to your group once you move out of the cafeteria and into your work group room. Once the group agrees to the agenda, you may want give the group an idea of its powers, and its limits. You might want to make some or all of these points:

   A. We have community input on some [or all] of our statements. You should consider it carefully, within the time we have available, and see if you can understand prevailing opinions about each statement. We may also find some single statements to be important or provocative even though the opinion may reflect only one

person's view.

B. Ultimately it is this group's decision what to include in the vision and goal statements.

C. It is helpful to remember that other people are going to be involved in taking the next steps based on whatever vision and goal statements we produce, so it will be helpful if the language is clear.

D. We don't have as much time as we might like. But if we work efficiently we can complete this work. At the end of this evening, we can schedule more work before May 15 if we feel we have to.

3. Next, you will need to suggest an approach, a way to work, a sort of process "launch pad" for getting the group's work done well. When you make your suggestion, consider it a proposal.

Please note: Whatever approach you decide to take, encourage your group to think about how each vision and goal statement relates to the three "legs" of sustainabilty: economy, equity, environment. People have chosen many of their draft visions and goals with sustainabilty in mind. In some cases, it will strengthen the statements if the Vision Council delegates make the link to sustainabilty more explicit in the language.

Alternative Approach A: One possibility is to apply a set of questions to each statement you are revising. For example, if the group is about to start revising its vision statement, you could suggest that you apply these questions (and show them on a flip chart):

1. What did the community suggest about this statement?

2. Based on the community's comments, or on our own reflections, what changes are needed in this statement (if any)?

3. Based on the "Questions For Reviewing Your Goals" how do we need to improve

this statement?

4. Consider carefully the comments from the Vision Stewardship Group. They have spent two meetings developing this feedback for you.

Alternative Approach B: Another way to get things going might be to ask people to take a quick survey with each other about the statement under consideration:

> "Based on the community input, the "Questions For Reviewing Your Goals" and your own knowledge, how many of you think this statement needs:
>
> (1) No revision;
> (2) Moderate revision;
> (3) Significant revision.

Then ask those who think it needs significant revision to identify their concerns and make suggestions for changes. Ask others in the work group whether they accept the proposed changes. Facilitate to consensus.

If no one wants to make significant revisions, but some propose moderate revisions, ask them to identify their concerns and make proposals for changing the statement. Facilitate to consensus.

You can create Alternatives of your own, based on your preferred way of working, and your knowledge of your work group. The primary thing here is to treat any alternative as a proposal, suggesting it to the group and asking if they accept it. Nine times out of ten, the group will accept, and you will move on. But when you

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Remember you can use the consensus method to work on these statements. That method means that you work to get proposals into discussion, and check often to see how much agreement there is with the current proposal. With those people who indicate by showing a certain number of fingers or a certain color card that they are not yet satisfied with the proposal for new language, keep asking them why:

- "What will it take for this statement to work for you?"
- "How do we need to change this statement in order for it to include your interests?"
- "Can you suggest a way to get your ideas included in this statement?"

and so on...

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have proposed something that seems unworkable or unclear to someone in the group, it is better to find out up front than to get started and then find you have problems.

Once you choose or develop an alternative, it is likely that the group will streamline it as they work with it. In any case, you will need to apply your process to each vision and goal statement the group has produced. It will be challenging, in some groups, to do this within the time available. Keep encouraging the group to participate actively and to move to closure as soon as people are ready.

You may find that part of facilitating this process will involve making your own proposals to the group for language that seems to satisfy their interests. It is better for specific proposals to come from group members. But sometimes no one can exactly express what they want changed in a way that translates well into a written statement. Then you may need to be a sort of on-the-spot verbal editor. For example, you may need to say things like "I think I hear you saying that if this word were changed to "excellent" everyone here could support it. Am I correct?"

Handy questions for this stage [choose from these or develop your own; use often to keep the meeting moving]:

- "Do we have any differing views on this statement?"
- "Do you accept this proposal? May I see your cards [or hands/fingers, if you are using "fist to five" consensus checking].
- "Are you ready to complete your work on this statement?"
- "Are you ready to move to the next statement?"
- "Have we heard all the ideas about changing this statement?"

Remember that you may need to make a LOT of proposals to get one goal done. Don't get attached to your own ideas. Be especially sensitive about not making proposals of your own when there are people in the group who are perfectly willing to make their own proposals. But if needed, keep letting failed proposals go cheerfully ☻ and keep putting new ones out there, based on what you hear the group saying.

⌚ Keep a good watch on the passage of time. You may want to ask a group member to help with this, and to tell the group as it is running out of time for each piece of its work, according to the agenda it sets for itself. It is a good trick to keep people aware of time, and working efficiently, without allowing time worries to insert anxiety and pressure into the group's deliberations. Try to convey a sense of energetic purposefulness, and a respect for time, without sounding (or feeling) anxious about it.

✐**Special note about recording:** If you are recording with a teammate who is facilitating, or if you are recording as well as facilitating, here are some tips:

A. Keep in mind the overall recorder commitments to neutrality, and to making sure the group's work has a life past this meeting.

B. For the 7:25 - 8:40 work session on vision statements and goals, you will likely need to take a "work sheet" approach to recording. You will be recording for a group editing process. You will primarily need to record delegates' suggestions for revising vision or goal statements. You may find that you record a few words, mark them out and replace them with others, and need to start over again several times before a group reaches agreement.

C. IMPORTANT: Be sure the final version of each vision and goal statement, as the group approved it, goes to the Sustainable Racine staff. It will help if you mark out thoroughly or discard all interim draft versions of each statement, and give only the final versions to the staff.

D. Do what you can to work quickly and efficiently. Often people will keep making "fine-tuning" suggestions even though they are comfortable with current language. If you sense that the group is very near agreement on language, after thorough discussion, you can help the

facilitator check on whether people have reached consensus. You could say something like this, "As I am recording, I don't hear much disagreement with either 'quickly' or 'rapidly.' Could you live with either of them? Could you pick one and move one?" You may be able to help the group ✂ cut through its own confusion.

If you choose to help move things along in this way, you must be prepared to let your suggestions go easily and cheerfully when the group rejects them. ☻

Even though two words or phrases seem to you to have the same meaning, the Delegates may want to continue discussing two different ways of saying something because the differences matter in ways that are hard to see from the outside. It's still their group, and it's still their responsibility to make decisions about how to state their vision and goals.

8:40 Work groups plan three minute presentation to whole Vision Council on May 23

This should be easy facilitation. Your work is to explain the task to your work group, give them a time limit ⌚ (probably around 15 minutes) and then ask them to make their plans with each other. Make sure any agreements they make get recorded for their use. ✍

Describe their task to them:

❧ As a way to prepare for the development of one overall vision for this whole effort, each work group will make a three minute presentation to the whole Vision Council on May 23.

❧ This presentation is about your group's **vision**, not the goal statements. It should convey, in any way the work group members want to show it, the following kinds of things:

- The underlying reasons and feelings behind your vision
- The heart and soul of your vision
- The thoughts, feelings and ideas behind your vision
- Why did you come to this vision?

❧ These vision presentations will be the first, important step in a full morning of structured work toward having one integrated vision for the whole process of work toward a vision for the greater Racine area's sustainable future.

8:55 **Work groups decide whether further meetings are needed: Any further changes to goal or vision statements must be completed by May 15. (Please let Deena [Ext 24] or Milton [Ext 23], know if you will be meeting again.)**

Any additional work on vision or goal statements after this evening must be completed and delivered to the Sustainable Racine office by 5:00 PM on May 15.

It may be obvious to you and to everyone whether the group plans to meet again or whether it has concluded its work. If people plan to meet again, make sure everyone knows where, when, and for how long.

If it is not clear whether the group wants to meet, either to work on vision and goal statements or to work on the vision presentation to the whole Vision Council, ask them.

- "Do you want to meet again to do more work on your vision or goal statements? That meeting would need to happen before May 15."

- "Do you want to meet again to prepare for your presentation to the Vision Council? That meeting could take place anytime before May 23."

Facilitate to consensus on what the group plans to do.

9:00 Adjourn

Thank everyone for coming.

Unless the group plans a special meeting, this is the last session for this work group, and will be your last opportunity to work with them as a facilitator (or as a facilitation team.)

Ask the delegates to assemble in the cafeteria when they arrive on May 23. There will be no individual work group sessions that day.

Say good night and bye.

And many, many thanks to you, dear facilitators and recorders, for your hard work on this demanding project.

Flip chart pages you may want to prepare in advance of May 7

1. Your proposed participants' agenda, with specific times allocated to specific goal or vision statements (see page 6 for an example).

2. If you use a set of questions to move through revisions of each statement, similar to those on page 8, put them on a flip chart page.

3. The seven conversation guidelines, if not otherwise available.

Build your agenda for 7:15 - 9:00 here

7:15 Open well: What will you include?

_____

_____

_____

7:25 Work on improving goals and vision statements: What process (or approach) will you propose to the work group? How will you plan to make time for each vision and goal statement that needs work?

_____

_____

_____

_____

8:40 Work groups plan three minute presentation to whole Vision Council on May 23: How will you explain and handle this?

_____

_____

8:55 Work groups decide whether further meetings are needed: Any further changes to goal or vision statements must be completed by May 15. How will you introduce this?

_____

_____

9:00 Adjourn directly from work groups