Collaboration and Community Team Building:
Working with Community Teams

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Collaborative Meetings

Preparation, Execution, and Follow-Up

Step 1: Team Start Up

- Work with your internal team to identify the purpose of the meeting, the immediate goal, and the long-term objective.
- Identify the target public audience that will participate in each meeting and identify their level of involvement based on the public participation spectrum
- After identifying the audience and the objectives of the meeting, decide how the public needs to be engaged.
- Be sure to convey this information to the participants before AND during the meeting.

Step 2: Data Collection

Before

Prepare the Participants

- Participants should receive details of the location, time, and agenda of the upcoming meeting.
- They should receive this information well in advance of the meeting, giving them adequate time to prepare, think of questions, and clear their schedules so they can attend.
- The audience should know who is expected to speak at the meeting and whom to contact should they have any questions before the event.

Prepare the Space

- Secure a space for the meeting that is conducive to the meeting's purpose. If planning small group exercises, avoid space with fixed seating and the inability to cluster participants comfortably.
- Make sure the space is well lit and has enough chairs/tables to accommodate all participants comfortably. Any information presented should be visible from all seats.
- Make sure the facility has restrooms or water fountains nearby and space for the participants to take a break.
- Consider providing snacks or lunch to keep the audience engaged, and comfortable.

Collaborative Meetings

Prepare Yourself

- Know your audience and anticipate their questions. This will help you be more prepared and knowledgeable about the situation and make your presentation more personable.
- Information, slides or handouts should be easy to read and easy to understand.
- Prepare enough materials for all participants.

During

- Keep the meeting focus on the meeting objective.
- Begin every meeting by explaining the agenda and objective, roles and rules.
- Present your information clearly.
- Leave time for questions and comments.
- Solicit input from every participant through individual exercises and/ or group discussion.
- After the meeting is over, make sure that the public has a CMS contact for any questions.
- Inform the public about next steps so they know when to expect updates or future meetings.

Step 3: Team Analysis

- Make time to analyze data with your team immediately following the data collection step (public meetings).
- As a team, summarize public data, determine its implications on your project/decision and decide what to do next.
- Be respectful of all public input, even if you do not agree with it.
- Decide how you will share you findings with others in your organization and with the public.

IAP2 Spectrum of Public Participation

iap2
International Association for Public Participation

Increasing Level of Public Impact →

	Inform	Consult	Involve	Collaborate	Empower
Public participation goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.
Promise to the public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example techniques	▪ Fact sheets ▪ Web sites ▪ Open houses	▪ Public comment ▪ Focus groups ▪ Surveys ▪ Public meetings	▪ Workshops ▪ Deliberative polling	▪ Citizen advisory committees ▪ Consensus-building ▪ Participatory decision-making	▪ Citizen juries ▪ Ballots ▪ Delegated decision

Checklists

Conversation Techniques

"There is nothing more powerful for sharing knowledge and creating innovative solutions than people engaged in conversation about something they care about."

Graphic Templates: These guides are colorful, pre-printed metaphors that create both a framework and open space for recording a group's thoughts and ideas.

Café Conversation: The Café is an interactive approach that allows groups of individuals to have a conversation, think together and explore questions that matter to their organizations and to the community.

Participants engage in conversations at their tables, noting key insights and perspectives, and then move to another table with new people to cross-pollinate ideas and insights. At the end of the café the entire group shares their collective thoughts in a facilitated "town hall" style discussion.

Journaling: To stimulate thinking, have participants write in free form about a topic for 5 minutes before discussing their ideas.

Create a Picture Collage: Using magazine pictures to express underlying emotions and values. Provide participants with a stack of magazine pictures, scissors, glue and 11X17 paper. Ask them to create a story of an ideal experience out of these magazine pictures.

Photographs: Photographs provide another way to elicit opinions and ideas from participants. Share photographs of various aspects of a concept, service or community. Also, ask participants to take photographs to help share their opinions.

Sticky Notes: These provide a rapid way for facilitators and participants alike to record comments. Sticky notes can also be moved or clustered to provide focus and direction for a conversation.

Dots: Brightly colored sticky dots. These are often used to vote and prioritize ideas. Dots can also be assigned to individuals or specific groups within a meeting to track their specific opinions (i.e. their thumbprint)

Checklists

Decision Options

Option	Pros	Cons	Uses
Spontaneous Agreement	• Fast, easy • Unites	• Too fast • Lack of discussion	• When full discussion isn't critical • Trivial issues
One Person Decides	• Can be fast • Clear accountability	• Lack of input • Low buy-in • No synergy	• When one person is the expert • Individual willing to take sole responsibility
Compromise	• Discussion creates solution	• Adversarial win/lose • Divides the group	• When positions are polarized, consensus improbable
Multi-voting	• Systematic • Objective • Participative • Feels like a win	• Limits dialogue • Influenced choices • Real priorities may not surface	• To sort or prioritize a long list of options
Majority Voting	• Fast • High quality with dialogue • Clear outcome	• May be too fast • Winners and losers • No dialogue • Influenced choices	• Trivial matter • When there are clear options • If division of group is okay
Consensus Building	• Collaborative • Systematic • Participative • Discussion-oriented • Encourages commitment	• Takes time • Requires data and member skills	• Important issues • When total buy-in matters

Checklists

Guidelines for Public Engagement

Give the public a sense of how involved they will be in the process before the meeting takes place.

If there are decisions to be made:

- Establish an understanding of who will be making the decisions, how the decisions will be made, how decisions will be implemented, and how they will be reported and evaluated.
- If the public has any part in impacting the decision, provide an opportunity to provide meaningful input.
- Provide a forum for decision-makers to understand individual and collective perspectives. Emphasize a willingness to listen and consider the presented ideas.
- The impacted public should not just participate in the process; they should also be given the opportunity to participate in the implementation and evaluation stages.

Checklists

Managing Difficult Situations

Hints & Tactics

- It is a good idea to have "ground rules." Post them on a flip chart for everyone to see.

- Review the ground rules at the beginning of a meeting. If someone is violating the rules – politely refer or point to the rules. Tell your participants the rules are there to emphasize productivity and fairness for everyone, including facilitators and staff.

- Brainstorm with colleagues in advance and try to anticipate public concerns. Consider "dry runs" with your colleagues to practice tough questions. The more prepared you are, the better you will be able to handle difficult situations. Well-prepared and effective meetings can "head off" some difficult situations.

- Consider acknowledging public concerns up front during your presentations. This "steals the thunder" of those who may plan to "attack." Know your weaknesses and don't be afraid to address them.

- Know both sides of an issue.

- Have a "safety valve" – additional staff available to provide personal assistance or a way to direct difficult questions for more information in a less public setting.

- Capture comments or concerns in writing – note cards for comments and questions for participants can be a helpful "safety valve."

- Don't fake it. If you don't know the answer to a question or don't know how to respond to a comment, be honest. Tell them you don't know but will get back to them. Have a plan for the best way to follow up with participants.

- Don't try to cover up or make excuses for a mistake. Apologize and promise to follow up on a problem.

- Rephrase questions or comments in softer language. This conveys that you heard the comment or question, but does so in a non-threatening manner.

- Never respond to insults with an insult – don't let an unruly participant "bring you down to their level." When a situation becomes confrontational and personal, stay calm. "When it gets hot, stay cool."

Checklists

- Avoid responding in a personal way and saying “you” in difficult circumstances. Use “‘I’ Statements.”

- If you can, identify and reach out to disgruntled parents or participants in advance of the meeting. Make personal contact when they arrive at the meeting by talking to them and soliciting their concerns. Try to connect with them. This can help minimize and manage possible public confrontations during the meeting.

- Watch your “non-verbals.” The participants are watching you: don’t frown, cross your arms, look at your watch, or shake your head. Use signs of understanding like nodding or standing with open arms to express support. This applies to supporting staff as well.

- A facilitator can manage the meeting but does not provide the detailed content; that is the presenters’ job. The facilitator can manage the Q&A and comments while serving as a buffer between a frustrated public and the presenter or expert.

You cannot always “win” an audience over. Maintain your cool, present facts with a professional and caring demeanor – even if it is a subject you are uncomfortable with.

Post Meeting Etiquette

Hand written thank you note to hosts and anyone who helped organize the meeting.

Make use of the web for any handouts or information you used during the meeting.

Consider developing a FAQ and posting it on the web – this can prevent any confusion about verbal answers you gave to questions in the meetings – refer public to the FAQ.

Make sure you follow-up on any promises you made – it adds credibility to you and your organization. Even if you can't deliver, make the contact!

- *"I will have to check on that for you."*
- *"Give me your email (phone number) and I will let you know."*
- *"I will let so and so know about your concern and we will follow-up with you."*

Collect emails for follow-up distribution – easy to do, broadcast emails for next meetings, new information, etc.

Checklists

Pre-Meeting Questions

Four Questions to Answer Before and at the Start of a Meeting

1. Purpose -- Why are we having this meeting?

2. Team -- Why has this particular team been pulled together? What is the role of each individual at the table? What is the role of this team in this project?

3. Meeting Goal -- What do we need to accomplish or decide by the end of this meeting?

4. Commitment – How will the agenda enable us to accomplish our meeting goal? How will this meeting position us to accomplish our larger goal? What will happen next?

Checklists

Preparing for Collaborative Meetings

Handouts & Agendas:

Why are we reading this document? What is it?

Tell the reader why the document is important. Objectives, goals, and purpose of the handout will give them an overview and most importantly help them decide if they will bother to read the rest of the document.

The handout should be a key take-away. Something that the audience member can use in the future to jog his/her memory of your presentation and key points.

Short & Simple:

Don't use more text than necessary – avoid "a wall of text." Make the handout short, to the point, and touching on the most important facts; the handout or visual should not be a script for the accompanying presentation- it should be an outline emphasize key words.

Simple and direct language will communicate to the broadest audience – avoid bureaucratic language and terms that are not commonly understood.

Basic Layout:

Just as the material on the handout should be easy to understand, it should also be visually easy to read. There is seldom need to use fancy fonts, tiny text, or extremely large headings. The eye moves across, then down. Remember this when formatting your text and the layout of the document.

Other Things to Include:

Your follow-up information will help people remain engaged and give them a method to find answers for remaining questions.

Checklists

Visual Aids:

Less is more:

Slides and overheads should not be cluttered. Use white space, clear fonts, bright crisp colors, and text large enough for your audience to read comfortably.

Keep the number of slides to the minimum; a title slide with the date and your name, a slide with the agenda of the presentation, and as few slides for the body of your presentation as possible. Remember, your slides will be an outline to the presentation, not a script. Always have a closing slide that includes a way to get more information or answers for follow-up questions. Consider developing a Frequently Asked Questions (FAQ) document as a reference or takeaway document.

Checklists

How to Manage the Experience

- **Was the Context Clear?** Make sure you clearly explain what the project or issue is, why it is important to get citizen participation and how their input will be used.

- **Was the meeting held in a safe and comfortable environment?** Public participation can feel cold and intimidating. Promote dialogue by seating participants at roundtables as opposed to auditorium style seating. Materials should be clear and concise and easy to understand. Do not set up barriers (such as an elevated stage) between participants and members of a public agency. Food and beverages always help.

- **Was there mutual trust and respect throughout the meeting?** Trust and respect are ingredients for effective public participation. Begin a meeting by explaining the purpose, outcome and agenda for the meeting. Establish ground rules. Demonstrate trust and respect by actively listening. Always stay neutral when soliciting input.

- **Were participants adequately educated in the discussion topic?** Provide participants with the information they need – through handouts or presentations – so they can provide informed responses. Be sure to keep information clear and simple.

- **Did every person participate?** Encourage full participation through individual and small group exercises such as table conversations, individual comment cards and questionnaires. Facilitators should solicit participation.

- **Were conversations focused?** Provide clear instructions for conversation topics. Visual tools, such as graphic templates help to focus and guide conversations.

- **Were conversations rich in content and ideas?** Use a variety of conversation techniques including brainstorming, café, story telling, journaling, and collage to stimulate participation. Ask participants to tell you the 'whys' behind their points of view.

Checklists

Facilitator Observation Checklist[1]

Behaviors That Help	Behaviors That Hinder
• Ensure that all participants provide relevant information • Help establish a climate of trust, openness and cooperation • Stay neutral • Encourage participation (i.e., “play ping-pong”) • Listen actively • Ask questions • Repeat and record comments in participants’ “own words” • Keep focused on outcome/task • Manage conflict • Help group take responsibility for and ownership of meeting outcomes	• Talks too much • Tries to be the center of attention • No understanding of group needs • Ignores conflict • Puts people down • Never asks, “How are we doing?” • Strays into content • Poor listener • Loses track of key ideas

[1] Adapted from: *Facilitation at a Glance!*, by Ingrid Bens. A joint publication of GOAL/QPC and Association for Quality and Participation (AQP). 1999.

Checklists

Group Behavior Observation Checklist

Behaviors That Help	**Behaviors That Hinder**
Actively listening	Talking too much
Paraphrasing main points	Interrupting
Questioning to clarify - "Let me understand this better"	Pushing for a solution
Open and flexible	Blocks – insists on getting one's way, doesn't compromise
Checking for agreement on what is to be resolved	Dominates – tries to run the group by dictating or bullying
Problem solving – looking at alternatives	Talking off topic – changing the subject
Win/win attitude – concern for other person	Win/lose attitude - personal slurs/ disrespect
Concern for other person's goal	Withdrawing – doesn't participate or offer help or support to others
Feedback – give specific details	Grandstanding – draws attention to one's personal skills, boasts
Praising other's ideas	Criticizing other's ideas, as opposed to giving them useful feedback
Building on other's ideas	Pushing your own ideas while ignoring other's input
Asking others to critique your ideas and accepting the feedback	Getting defensive when your ideas are analyzed
Being open to alternative courses of action	Sticking only to your ideas and blocking suggestions for alternatives
Dealing with facts	Basing arguments on feelings
Staying calm and friendly towards colleagues	Getting overly emotional, showing hostility in the face of any disagreement

From: *Facilitation at a Glance!,* by Ingrid Bens. A joint publication of GOAL/QPC and Association for Quality and Participation (AQP). 1999.

Checklists

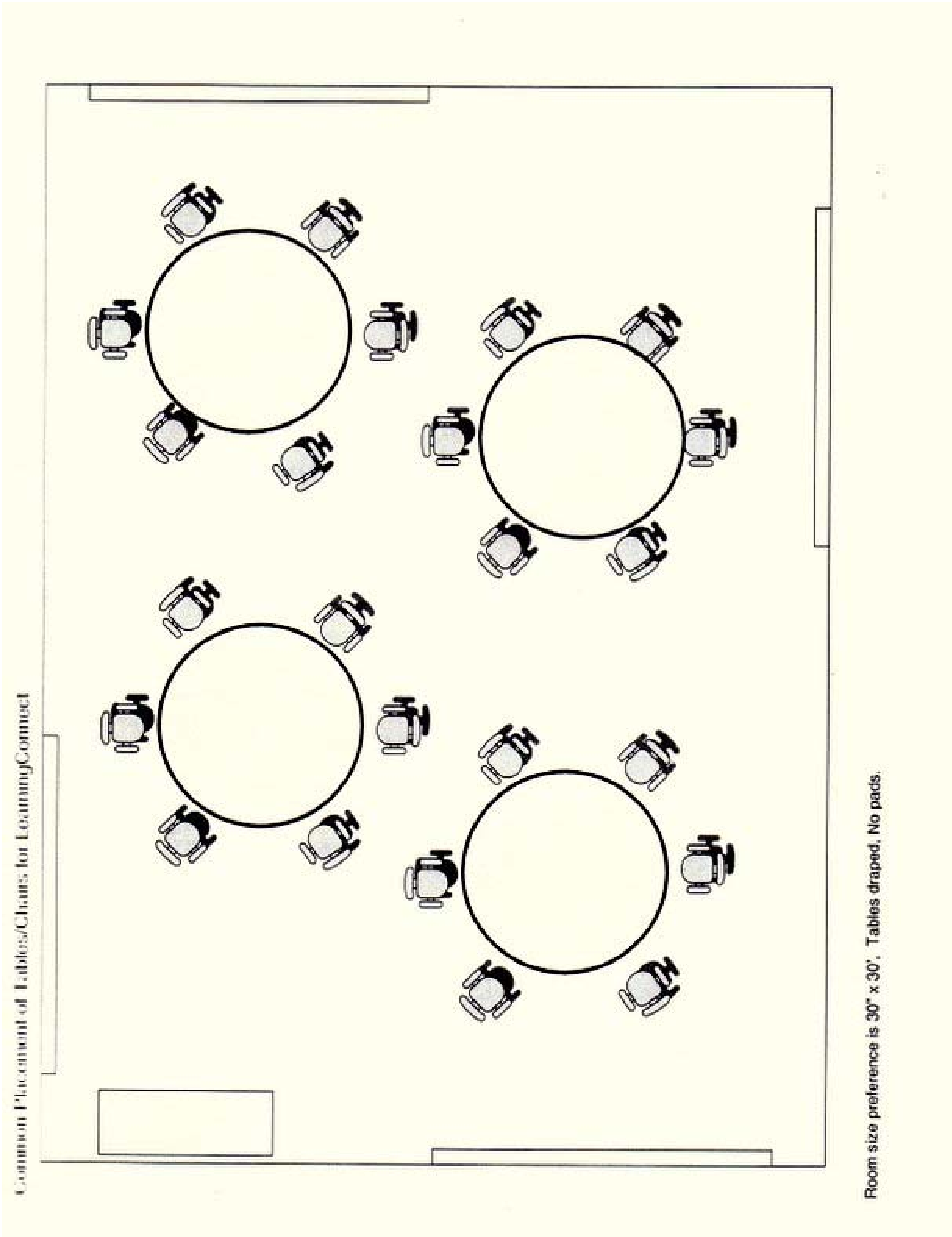
Room Checklist

☐	Atmosphere – is the room cheerful or depressing? Does it have an outside window?
☐	Layout – Is the room large enough or will it be too small? Can you post flip charts on the walls?
☐	Furniture – Are the chairs comfortable? Too comfortable? Are there tables? What shape are they? Is the furniture movable?
☐	Conveniences – Where are the rest rooms, fire exits, lunchroom, etc.?
☐	Lighting – Is there sufficient lighting? If there are windows, can they be darkened?
☐	Noise – Is the room free of excessive noise? What is scheduled in the room next door?
☐	Heating and Cooling – Will the temperature be appropriate and can you control it? If you cannot control it yourself, how can it be controlled?
☐	Does the room have needed audio-visual equipment?

ROOM ARRANGEMENT AND ITS IMPACT ON DIALOGUE

Circle	Chairs in a circle with no table provide an informal atmosphere. Good for small groups, but no writing surface.
Semicircle	Good if you are going to be recording info on a flip chart. Scribe/facilitator can stand at the open end.
Round Table	Facilitates eye contact and informality while providing a place for writing. Facilitators can sit at the table or move around the outside.
Square/Rectangular Table	More formal, makes eye contact difficult. Tends to be the norm.
U-Shaped Table	U-shape with chairs on the outside. Allows facilitator to enter the U-shape and make more direct eye contact with the members.
Closed Square Shape	Open up the square so you can use the space inside the square.

Checklists


Common Placement of Tables/Chairs for LearningConnect
Room size preference is 30' x 30'. Tables draped. No pads.

Training Aids

Sample Brochure

Community Workshop Agenda...6pm-8pm

- Welcome and Orientation *(CMS Staff/Group Discussion)*
- Boundary Option Presentation *(CMS Staff Presentation)*
- Reactions to Boundary Options *(Small table/Large Group Discussion)*
- Next Steps in Process *(CMS Staff)*

About the CMS Boundary Process

As the student population in Mecklenburg County increases, the Charlotte-Mecklenburg School system must periodically update all jurisdictions and student assignments for individual schools, including new schools.

When evaluating changes to boundaries, CMS will develop solutions that take into consideration demographic information, transportation zones; natural boundaries such as major streets, neighborhoods, and other criteria, including boundaries that distribute students based on projected growth patterns.

It's the responsibility of CMS planning staff to develop options for the 2008-2009 school year, share these options with the public, incorporate feedback, and present recommendations to the Board.

Has CMS already decided what the school boundaries will be for 2008-2009 and 2009-2010 school year?

No. CMS staff has developed options for consideration. Based on public input, CMS staff will recommend one of the proposed options to the Board of Education or recommend an alternative option.

CMS Goal for Public Participation in the Boundary Determination Process

To obtain meaningful feedback on boundary options from parents and community residents.

Our Promise

We will keep you informed, listen to your input, acknowledge your concerns, and provide feedback on how your input influenced the decision on boundaries.

cms®
Charlotte-Mecklenburg Schools

CMS Staff
Scott McCully
Executive Director, Planning Services and Student Placement

Christine Hamlett
Planning Specialist, Planning Services Department

Jennifer Dean
Planning Specialist, Planning Services Department

For more information about these boundary options visit…
http://www.cms.k12.nc.us/departments/studentPlanning/maps08-09/

Questions or comments may be sent to
planning@cms.k12.nc.us
or call (980) 343-6246

cms®
Charlotte-Mecklenburg Schools

CMS
2008 and 2009
School Boundary Options

Community Workshops
Fall 2007

<u>More Students / School</u>

An elementary school with six rooms per grade level (kindergarten through fifth)
K-5=23 students per class = 6 x 6 x 23 = 828 students on the traditional calendar

On a multi-track year-round calendar, the school can hold eight sections per grade with 23 students per class = 8 x 6 x 23 = 1,104

So 1,104-828 = 276 additional students or **33%** increase

Training Aids

Successful Collaborative Meeting Experiences Include…

Structured Presentation

Well Facilitated

- No one dominates
- Within agenda/time
- Listen
- Clear information
- Personalized
- Connected

Good Environment

- Arrangement
- Hearing
- Seating
- Temperature
- Scenery

Learn Something From the Participants

Clear Expectations

- Met
- Understood

Good Turnout

- CMS Staff
- Successful attendance
- More than usual crowd
- Diverse crowd

Know the Community

- Have solutions and answers
- Anticipate problems

Meaningful Input- Quality, not Quantity

Correct Timing for Input

Follow-up Response & Impact of Decisions

Preplanning with the Internal Team

Public Walks Away with Information and is Positive

Training Aids