Civic Engagement Forum: Shaping Your Economic Future

Purpose of the Forum

Residents are more likely to embrace the proposed solutions to local problems when offered the opportunity to voice their opinions and offer their insights on the important opportunities and challenges present in their community. Furthermore, they are more likely to welcome the opportunity to actively participate in putting proposed solutions into action.

The forum represents a valuable opportunity for local people to engage in discussions about the assets of local communities and the issues that are limiting their ability and that of the region to realize their full potential.

Pre-Forum Guidelines

Potential People to Invite

Consider a broad range of people who represent different sectors and segments of the population in the community. To ensure the forum accurately captures the pulse of local residents, a diversity of people must be invited to the forum – individuals who can offer different viewpoints and perspectives on ways to advance the well-being of the community. The mix of people to invite could include:

- Industry and financial leaders
- Representatives of faith-based organizations
- Entrepreneurs/small business leaders
- County Extension Service personnel
- State and federal Congressional representatives or staff
- Local and regional government representatives
- Minority and women-owned business owners
- Chamber of Commerce, economic development, and/or tourism organizations
- Workforce Development Board representatives from the area
- Educational leaders and organizations
- Nonprofit, voluntary and civic-minded organizations
- Community foundations
- Rural cooperatives

Where to Host the Forum

Selecting an easily accessible location is important, including paying close attention to the special needs of individuals with disabilities. The forum should be held in a location that is non-threatening or non-intimidating to individuals you want to participate. While city/town hall, the courthouse, or the Chamber boardroom may automatically come to mind as an ideal location for a forum, the LEAD team should consider whether these are inviting venues for those you want to attract to the forum. Perhaps schools, public libraries, county Extension offices, or community centers may prove to be ideal locations for achieving a good turnout.

Scheduling the Forum

The meeting should be scheduled at a convenient time for the target audience. Evening meetings may work best, but some communities may produce better attendance for a breakfast or luncheon event. If an evening meeting is the most desirable, consider resident's commute time from work to determine the starting time. In communities where many residents work out-of-town, a 6:30 p.m. starting time may be best; otherwise, a 5:30 p.m. starting time may be ideal. Again, it depends on the habits and commuting patterns of the residents. Because there is really no "best" day of the week that works in every community, polling key individuals to help select the day may be helpful.

Preparing for the Work after the Forum

Give thought to the work that will follow the forum as some important linkages will need to happen at this meeting. For instance, determine how to maintain contact with forum participants that do not choose to join the planning process in the future as the planning continues. Be prepared to communicate the opportunities to stay connected at the close of the forum.

Identify someone to collect the "About Me" forms and maintain those contacts. As the team moves forward and identifies specific needs to build linkages in the community, this information may help quickly identified knowledgeable individuals to help.

Identify someone to take pictures of and collect the flip chart notes at the close of the forum and transcribe them into a single document. These notes should be shared with the planning team for review before the next meeting.

Setting up the Forum Space

The area should be set up with round tables that will seat 6-8 people allowing enough space for the expected participants to fill all spots. Number each table and place a table tent in the center with the number clearly visible. Place a flipchart and markers at each table. Place "ingredients for success" cards or table tents on tables.

Preparing the PowerPoint

The basic PowerPoint slides are provided for your convenience. However, some slides require customization before the session begins. For instance, you will need to insert your planning team names and/or logos, the agenda, and appropriate contact information on the final slide.

Materials Needed:

- PowerPoint Slides
- Nametags
- Table Tents with Table Numbers
- Numbered sign-in sheet that matches number of tables
- "About Me" Forms
- Markers
- Pens
- Worksheet Packets
- Flipcharts
- Sticky dots
- Table rotation materials (see below for suggestions)
- Computer
- Projector
- "Ingredients for Success" cards or table tents for participants
- Timer

Preparing for Participant Arrivals

Provide nametags for participants as they enter. Encourage them to just use their first name as this promotes an atmosphere of equality and relaxed discussion. Have a sign in sheet numbered down the side to match the number of tables you have. As people arrive, enter their names in order down the page and give them a sticky dot or card with the table number on it. This will be their assigned table for the first round. NOTE: Assigning people straight down the list as they arrive helps to break up groups that may have come in together, making for a richer conversation. Additionally, provide an "About Me" form (see handouts) that has more detailed contact information including the county in which they live, email, phone, address and employment or groups/organizations with which they are associated. This information will be helpful in determining what sectors have been part of shaping the civic forum outcomes.

Table Rotation Protocol

The goal of the rotation is to ensure that participants are mixed with different people at each round. You may do this a number of different ways. Here are a few possibilities. Feel free to adjust or adapt to meet your needs.

- Place a cup on each table that has slips of paper with the numbers of each table. For instance, if you have 10 tables, the cup would have ten slips of paper numbered consecutively from 1-10. At the close of a round, participants would draw a number from the cup to determine their next table. They could then deposit the slips back into the cup so the process can be repeated on subsequent rounds. This is quick and easy, but does require a bit of thinking about the number of tables you have and the number of seats at each table. For instance, if you have eight tables and eight spaces at each table, this is an easy 1 to 1 match. However, if you have more tables than you have spaces at each table, you'll need to stagger the numbers.
- The table facilitator goes around the table and gives the participants the number of their next table. Again, this takes a bit of forethought to consider how to ensure even numbers at all tables without overfilling the space at any one table.

What if the Tables Are not all Filled Up? If this happens, before the session begins, ask people from the highest numbered tables to leave those tables and fill in empty spots on lowest numbered tables so that participants are more equally distributed across all the tables. Be sure to leave one seat empty at a table or two in case latecomers need to be added.

Civic Engagement Forum: Facilitator's Guide & Key Roles

Forum Facilitator

This role is vital to the flow and effectiveness of the forum. The forum facilitator:

1. Helps create a comfortable environment for the participants.
2. Welcomes participants as they enter the meeting room.
3. Explains the purpose of the forum and shares the guidelines for a successful forum. (These are ground rules the facilitator should share with those participating in the forum.)
4. Briefly reviews the agenda and explains the logistics of how each round will work.
5. Poses the questions for each round and makes sure the questions are visible to everyone.
6. Urges the participants to share their honest views of the topics being discussed.
7. Encourages people to engage one another at their tables.
8. Appeals to everyone to voice their opinions. The forum intentionally seeks out participants with different perspectives on the issues discussed during the forum, so having all people weigh in on these issues is important.
9. Moves around to the various tables to observe how the discussions are going. Discreetly lets the table facilitator know when it may be time to move on to another issue/item that the group needs to tackle during a specific round.
10. Ensures key insights are being recorded visually whenever feasible (i.e., flip chart paper) since this will help everyone to see the key points each table wants to share with the other participants.
11. Serves as timekeeper or appoints a timekeeper to ensure everything stays on schedule.
12. **MOST IMPORTANT:** Stays impartial as the group weighs the various questions. It is critical that this person not share his or her perspective on any of the items under discussion. He or she must truly remain neutral throughout the forum.

Table Facilitators/ Recorders

NOTE: As the forum facilitator, please review these roles and responsibilities with the table facilitators to ensure that they fully understand how they are to conduct each of the rounds during the course of the forum. A table facilitator should be assigned to every table in use at the forum. A copy of these roles is provided at the end of this document to use as a handout for table facilitators as a reminder.

1. With the participants at your table, review the specific questions they will address during the round.
2. Guide the group through each step of the round (as outlined in the meeting protocol).
3. Capture all the key points and record these on the flip chart.
4. Urge individuals to use the thinking sheet to jot down their ideas and insights.
5. During discussions, seek to engage everyone at the table.
6. Work diplomatically to prevent one or more persons from dominating the discussion.
7. Turn table notes in from each round, ensuring the table number is recorded on the page.
8. Remain at the table when others leave for the next round; welcome new people to your table.

Forum Participants

1. Share your honest views.
2. Listen carefully and respectfully to the views of others.
3. Only one person speaks at a time.
4. Speak from your own personal perspectives or experiences rather than on behalf of others.
5. Be sure everyone at the table shares talking time equally.
6. Turn off or silence your cell phones.

NOTE: These are provided as table tents or cards for participants and will also be listed on a PowerPoint slide discussed at the opening of the forum.

Civic Forum: Detailed Guide

Welcome & Introduction to the Forum [slide 1]

5 MINUTES

Have opening slide up when participants enter the room.

- Welcome participants to the Civic Engagement Forum.
- Identify the forum partners responsible for bringing it to their community.
- Recognize the national partners: funded by the USDA Rural Development federal agency in partnership with the nation's four Regional Rural Development Centers and the Purdue Center for Regional Development.
- Explain that their community is one of 6 pilot sites around the country selected to participate in LEAD.

What is lead? [slide 2]

2 MINUTES

Briefly explain the purpose of LEAD. Ultimately, LEAD is an opportunity for the community to bring together a larger set of partners to focus on 1-3 opportunities for action that can serve to strengthen the community/region for future economic growth.

Explain to participants that their role today will be key in helping to identify the opportunities that will be carried forward by the LEAD initiative, and that they will have the opportunity to join the work as it moves forward.

What will we be doing? [Slides 3-5]

5 MINUTES

Show the agenda [slides 3-4] which includes specific topics that the forum participants will discuss over the course of the forum. Indicate that the process will require people to change tables at some point. Let them know that you will provide them with instructions prior to the start of each round. NOTE: These two slides are samples only – be sure to adjust to fit your schedule.

Then, share with them the ingredients for having a successful forum [slide 5]. These can be placed as table tents on each table, given out as cards to each participant, or shared in other ways to help promote the session's success.

ROUND 1: Examining the Strengths of the community [Slide 6]

30 MINUTES

Introduce the first round of questions. Introduce the first one, then after about 10-15 minutes, bring up the second discussion point for the tables to consider:

- ✓ What do you think are your community's greatest strengths? [10-15 minutes]
- ✓ Put a star by the THREE things that your group sees as the most positive features (greatest strengths) of your community. [5-10 minutes]

Collect and synthesize charts: Remind table facilitators to put their table numbers on the chart pages. Next, ask volunteers to pick up the charts and post to a designated wall together in the room. Do not do a report out at this time. Rather you will take these up and have a small team synthesize them while the participants continue with the next round. This should be done quietly in the background while tables continue to work on Round Two. The summary should include a listing of the top 3 features ranked in order by the number of tables that identified it as a top 3 feature.

ROUND 2: Exploring Major Challenges in the community [Slide 7]

30 MINUTES

Once the important strengths are captured, change the focus to the key challenges currently impacting the community.

- ✓ What do you think are your community's greatest challenges? [10-15 minutes]
- ✓ Put a star by the three things that your group sees as the greatest challenges. [5-10 minutes]

Report out process [slide 8]: In order to get maximum information in the most efficient manner, call on the presenter for each table to share ONE major challenge that the table identified. Move to Table 2, then Table 3, and so on with each table adding one new challenge identified. As challenges are identified, list them on a flipchart. Ask people to listen carefully so they don't repeat a challenge that has already been listed. After giving every table an opportunity to respond, move to a second round asking for ONE new item from each table's list. If necessary, move through a third round of responses from each table if there remains new ideas that need to be offered or until all ideas are listed. When all of a table's ideas are listed, they can simply "pass."

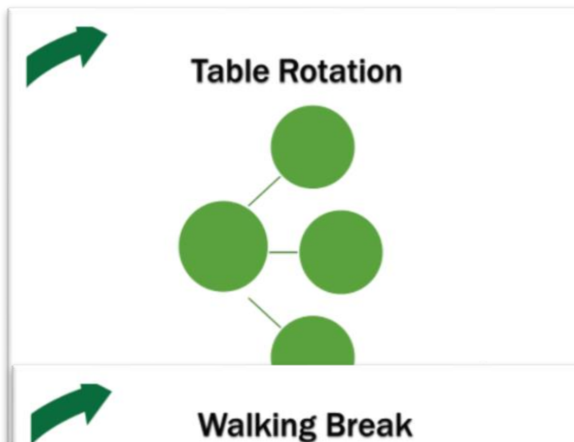

Table Rotation [slide 9]: Provide participants instructions on the process for table rotation, and ask them to find their new tables.

Walking Break [slide 10]: Prior to the break, assemble all of the "Strengths" charts along with the summary in one part of the room and all the "Challenges" charts along with the summary just created in another part of the room.

Invite participants to take a 15 minute walking break and read the charts posted around the room. Consider what opportunities might exist in the region for enhancing strengths and/or addressing challenges. (15 min.) 1 minute instruction; 15 minute break; 4 minutes to regroup tables for Round 3.

Round 3: Identification of Opportunities [Slides 11-12]

30 MINUTES

Meeting Facilitator: Ask the participants to rotate to a new table using the process you have identified. Then set up the next round using the key ideas provided below.

This last round will capture thoughts on ways to build on the strengths and address the challenges that exist in the community.

- ✓ As a table, consider what opportunities might exist for enhancing our strengths or addressing our challenges. Take into consideration, the following guiding questions: [20 minutes]
  - What challenges might this opportunity help address?
  - What strengths might his opportunity enhance?

- ✓ Given these opportunities, what ***could*** we do? (As a table, what do we think is feasible?) The focus is on what is feasible and may have the greatest support and/or resources. Table facilitators should simply walk table participants back through the list they generated and place a check mark beside the items that the participants believe ***could*** be done. [5 minutes]

- ✓ Given the opportunities we could do, what ***should*** we do? (Of the ones with check marks, what do we, as a table, think is most pressing or urgent?) Starting with the items the group checked as "could be done," the table facilitators should walk participants back through a discussion of which of those should be done, meaning they are pressing and could lead the community to a positive win. Table facilitators should place a ***star*** beside these selections. [5 minutes]

There is not a set number of "coulds" or "shoulds" for this round. However, participants are encouraged to consider these questions carefully as they will shape the direction of the remainder of the process.

Groups Report out [slide 13]

5 MINUTES

Ask each table facilitator to name **one** opportunity from the table's ***should*** list, being careful not to repeat what has already been said. The forum leader should record these onto a master list. Once each table has had the chance to name one item, go around again to see if there are other "**should**" items that have not been named. If all of a table's selections have already been named, the facilitator can just pass. Continue with additional rounds as needed to ensure that all "should" items are listed. Once the list is complete, ask if there are similar ideas that should be grouped together. If so, combine those and make one clean list and draw lines between the different options to prepare for the voting process to come.

Prioritizing Opportunities [slide 14]

5 MINUTES

Table facilitators should ensure that every person has 3 dots. Participants should place their 3 dots on the 3 opportunities that they feel should be the top priorities the group should consider moving forward. After everyone has voted, add up the total number of dots for each opportunity to see which priorities are most important to the group as a whole.

Overview of Resources [slide 15]

30-60 MINUTES, depending on number of agencies

NOTE: Be sure to update this slide prior to the session with the federal agencies and other funding agencies in the room. Also the placement of this portion of the event is somewhat flexible. However, at this mid-point it provides some "food for thought" as the second half of the session progresses.

During this time, ask the funding partners in the room to share a brief overview (10-15 minutes each) on the kinds of efforts they fund. However, if the overall number of agencies is more than 4 or 5, you may need to set a shorter time limit.

Consider using a timer and a set of timekeeper cards (5 minutes, 1 minute, time is up) to keep the session from going over the time allotted.

Additional note: Encourage agencies to bring materials to share at a table that participants can browse at their leisure. Also, encourage them to sit at appropriate tables relevant to their funding priorities once the discussions around specific prioritized opportunities begin.

Priority Discussions Introduction [slide 16]

10 MINUTES

Once the voting is complete, consider which priorities have surfaced as most important to the community. The number of priorities selected for the second half of the forum requires some guidance by the coach. For instance, if the community is very small and resources are scarce, focusing on only one priority may be an appropriate approach to suggest. Likewise, if one priority soared well to the top of others by numbers of dots, that may indicate the need/desire for a significant focus with other priorities being reconsidered after an initial success. However, a set of priorities with very close number of votes at the top may point to selection of several opportunities to explore. Or if the community has successfully brought a broad set of participants and partners into the process, pursuing more than one opportunity simultaneously may be feasible.

Ultimately, the community decides. So, as you prepare to begin the next session, discuss the voting results with the group and suggest a number of topics that seems appropriate, given these considerations. But ask the group if they agree with that suggestion, keeping in mind that local desires and interests will ultimately drive progress.

Once the group has agreed on the topics to be explored during the afternoon, assign topics to the various tables around the room. Then ask participants to select a topic on which they wish to work for the remainder of the forum. Chances are these will be larger groups so may require some shifting of chairs or space to provide adequate seating for all participants.

Picturing Success [slide 17]

20 MINUTES

This slide contains the first of three discussions around the identified priorities. For this first discussion, invite participants to dream a little. Ask them to imagine they had been wildly successful in pursuing the opportunity they selected. In 3-5 years [or another appropriate time period if opportunities are very short in nature], how will this community be different? What changes would the work you had accomplished made in the community? The point of this question is to imagine the future they hope to create through the work.

The Path to Success [slide 18]

30 MINUTES

The second discussion builds on the previous dream of success. Considering where we are now, what would the community need to do to reach its vision of success? While these do not necessarily need to be every little step along the way, the group should at least point to major tasks that would need to be accomplished. The point of this question is to visualize the pathway from the present to the envisioned success.

Resources [slide 19]

30 MINUTES

The third and final discussion builds on the previous pathway discussion. Considering the pathway the community would need to take, what resources would help them reach success? Encourage the groups to consider all relevant resources including:

- Ones already available and ready to use
- Those that exist in the community but may need to be adapted or developed
- Those that would need to be brought in or created (i.e. don't exist in the community right now)

The point of this question is to develop a resource list that acknowledges the important resources available internally, but is also realistic about what may be missing.

One rule: They cannot write down "grants," "funding" or any other type generic word for money. Rather they must dig down to why they need the money. Money is just a tool to get resources you need. What are the resources the community believes it would "buy" with funding? For instance, suppose a community decided it needed an after school program, but felt it was not possible without grants. Ask, "What would you use the grant funding for?" Perhaps the answers would be to pay teachers, to buy art supplies, to purchase snacks. Then the resources needed actually are: teachers, art supplies, and snacks. By moving people past the barrier of "got to get grants," they may be able to envision different paths to their resources. Continuing on this example, perhaps retired teachers would volunteer hours, local artists would bring materials and teach classes, and local faith-based organizations would donate packaged snacks. It may not be necessary to go into this explanation prior to the discussion; however, it is provided here for the sake of the coach's understanding of the rule in case of questions.

Opportunity Group Report Out [slide 20]

5-15 MINUTES - Time Varies by number of groups

Provide each group with a five minute time limit to summarize their three-part discussion. This can be fun and upbeat by setting the stage. Before beginning, set a timer for a couple of seconds so that the participants can hear the sound of the ending signal. Tell them that when they hear that sound, everyone starts clapping, whether the speaker is finished or not.

Then ask for a volunteer reporter that thinks they can beat the clock (5 minutes). Once the volunteer begins speaking, start the timer. If the reporter finishes before the timer, encourage them by starting a round of applause. If the timer goes off, start applauding and thank them enthusiastically (others will follow your lead and clap). Keep it fun and upbeat, and you're not likely to have more than one person that goes over the allotted time.

Next steps and concluding remarks [slide 21]

10 MINUTES

This is a wrap up slide that helps participants understand what will happen next. While the forum facilitator (you) have taken a central role in the forum, helping the community understand their ownership is vital.

One approach: Ask the LEAD team to stand and briefly explain that these individuals have been responsible for organizing the forum and are committed to pursuing action over the coming months. (Have them continue to stand) Ask anyone that lives in the community (county/region) to stand. Speaking to them, note that they are the ones that have the most at stake in the success of the LEAD initiative. While others (like yourself) are here because they care, the ones standing have the most to gain from success. Allow people to be seated. Then ask for a show of hands of those willing to continue to work on the priorities identified today. Thank them and tell them about the process going forward. Be sure to include the next meeting date and be sure a sign-up process is available.

If someone from the LEAD team is not already identified to gather and type the notes, you may want to solicit a volunteer from this group. HOWEVER, be sure to take pictures of all notes before they leave as a back-up. Because…life happens.

Closing Comments [Slides 22-23]

5 MINUTES

a) Express your sincere thanks to those taking part in civic engagement forum.
    b) Remind people to turn in their "About Me" forms if they haven't already.
c) Encourage them to sign up for future work.
d) Close with Slide 23 with the appropriate contact information inserted.

After the Forum

Once the forum is over and participants have left, be sure to do these things:

a) Make sure all flip chart papers are labeled with the round number and table number (where applicable).
b) Take pictures of all charts as a back-up way of preserving the rich data.

c) Gather all charts together ensuring to keep them in a logical order so they can more easily be transcribed.
d) A person should volunteer to type the notes and converts them into a single document to serve as a record for the group. Once the notes are typed, they should be distributed to the planning team and reviewed prior to the next meeting.
e) Gather all "About Me" forms and record the information in the way that best serves your follow-up communication plan. Keep in mind as you move forward that some of these individuals may serve as important links to help move the process along.

Table Facilitator Responsibilities

1. With the participants at your table, review the specific questions they will address during the round.
2. Guide the group through each step of the round (as outlined in the meeting protocol).
3. Capture all the key points and record these on the flip chart.
4. Urge individuals to use the thinking sheet to jot down their ideas and insights.
5. During discussions, seek to engage everyone at the table.
6. Work diplomatically to prevent one or more persons from dominating the discussion.
7. Turn table notes in from each round, ensuring the table number is recorded on the page.
8. Remain at the table when others leave for the next round; welcome new people to your table.