

Community Leader's Guide



The following materials provide an overview of the kinds of skills and knowledge you need to help your community improve. There are self-tests you can fill out for your knowledge, questionnaires that the group you are working with can fill out, basic information that will help you and your group function effectively, and some exercises that will help you practice skills. Everything in this guide is practical and has been used successfully.

These materials can be used by: trainers and consultants in working with a community group, concerned citizens who want their

community to improve and are willing to take on a leadership role. There are many different sets of attitudes and activities which go into long-term community development.

The contents of this manual represent a set of building blocks that include communication, team building, planning, meeting management, volunteer management and fundraising. Each block incorporates the skills discussed in the earlier blocks so we suggest you begin with communication.



If you have comments, please send to [Marlene Rebori at reborim@unce.unr.edu](mailto:Marlene_Rebori@reborim@unce.unr.edu)

Adapted from the "Community Leader's Guide" developed cooperatively by: Community Colleges of Spokane, Institute of Extended Learning and Washington State University Cooperative Extension.

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Introduction: Communication

It is easy to talk... but it is less easy to communicate. It is easy to be silent while another is talking...but less easy to truly hear and understand. Communication, above all, comes from the heart. If your emotional desire is to make a meaningful connection with another person, you will keep communicating until you have both heard one another's message.

Communication skills of individuals in a group have an enormous impact on the quality of decision-making that occurs in the group. While it may seem simple to communicate, the reality is that how one expresses oneself is impacted by the life experiences one has had. Similarly, we tend to hear according to what we want to hear or we interpret what we hear on the basis of past life experiences. When you combine this with the large variation in vocabulary and the multiple meanings that many words have, one can see that achieving clear communication is a challenge and requires continual effort.

This section describes four specific communication skills:

- paraphrase
- perception check
- behavior description
- "I" statements

along with some self-quizzes and some exercises to help you practice these skills.

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How do You Listen?: A Self-quiz

Purpose:

Your answer will help you discover where you may have developed listening habits which keep you from being a good listener.

Process:

Read each question. Do not try to second guess the intent. Answer with yes or no, according to your usual behavior.

1. Science says you think four times faster than a person usually talks to you. Do you use this excess time to turn your thoughts elsewhere while you're keeping general track of a conversation?
2. When somebody is talking to you, do you try to make him or her think you are paying attention when you are not?
3. When you are listening to someone, are you easily distracted by outside sights and sounds?
4. When you are puzzled or annoyed by what someone says, do you try to get the question straightened out immediately either in your own mind or by interrupting the speaker?
5. Do certain words, phrases, or ideas so prejudice you against the speaker that you cannot listen objectively to what is being said?
6. Do you listen primarily for facts, rather than ideas, when someone is speaking?
7. If you feel that it would take too much time and effort to understand something, do you go out of your way to avoid hearing about it?
8. If you want to remember what someone is saying, do you think it is a good idea to write it down as she or he goes along?
9. Do you deliberately turn your thoughts to other subjects when you believe a speaker will have nothing particularly interesting to say?
10. Can you tell by a person's appearance and delivery that he or she won't have anything worthwhile to say?

If you have answered "no" to every question, you are a rare individual; the perfect listener. Each "yes" shows you a very specific listening habit to change, if you want to improve your communication.

Adapted by Family Community Leadership from Listen to Hear, Ohio State University Extension Service



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Listening Habits

Let's look at each of the self-quiz questions one by one.

Answer to Question 1:

Skip and jump listening. Most people talk at the rate of 125 words per minute. Most of us think at least four times faster than this. With concentration and practice, we can listen and understand as much as 500 words per minute. Since we think so much faster than people speak, our minds tend to wander to other things.

A good listener avoids mental wandering and concentrates on the speaker.

Paying attention to voice changes, facial expressions, and gestures will also help increase your ability to concentrate on what is being said. You can develop better thought patterns by asking yourself questions such as, "What is the speaker trying to say?" "What point is the person trying to make?" Weigh facts given by a speaker by raising such mental questions as... are the facts accurate, prejudicial, complete? Is the source reliable?

Answer to question 2:

Pretending attention habit. Many of us learned at an early age how to pretend to be listening. We frequently do this when the subject is difficult to comprehend, or the speaker is a person we do not recognize as an authority. Or we may have something else on our mind.

This non-hearing level of listening cheats us out of a chance to learn

Answer to Question 3:

Yielding to distractions habits. It takes conscious effort to screen out the distractions whether they are audible, visual or physical. Eliminate as many distractions as possible. If you can't eliminate the distraction, fight it by concentrating on ideas presented by the person talking to you.

Listen at the thinking level.

Answer to Question 4:

Supersensitive or argumentative listening. If you have firm convictions or prejudices, a person presenting a different opinion may unwittingly step on your mental toes. When this happens, you unconsciously stop listening and start developing arguments to defend your position. In the meantime, you may have completely missed the main points of the other person's comments.

A good practice is to learn to control your emotional reaction.

Hear the person out. Evaluate objectively the facts and opinions he presents. Try to figure out why the person is saying what he says. You may learn an entirely new idea.

Answer to Question 5:

Emotional deaf spots. Certain words can push our button, or make us see red. They trigger an emotional reaction and we pull down a mental filter turning the speaker out. We start thinking of unpleasant memories brought

up by the use of one of these words or phrases. While we are recovering from this emotional reaction, we may miss much important data the other person was trying to give us.

List those words and phrases that cause you trouble.

Analyze them to find out why they bother you. Recognizing your response, using the words, becoming aware of your sensitivity, and learning to be objective will help you control your emotional reactions.

Answer to Question 6:

"I get the facts' listening. A speaker is presenting a series of facts. While you are trying to concentrate on fact one and memorize it, the speaker may already be discussing fact two or three. After several facts you wind up with a few memorized, other garbled, and some missed completely.

Instead listen for ideas.

Weigh one fact against another. Look for relationships between facts as a person is speaking and you will find that she may be using several facts to develop one or two main ideas. You will be listening at the "thinking level".

Answer to Question 7:

"Skip the difficult' listening. To quit listening if a subject is difficult to understand can become a habit. You could cheat yourself by "tuning out" things you might really want to know.

Make a point to concentrate on topics that require effort to follow.

It will help if you ask the speaker a question that will help clarify a point or understand a main idea. If you can't interrupt, make a note to ask the question when the speaker is finished.

Answer to Question 8:

Pencil-and-paper listening. When we concentrate on taking notes we can only hear half of what is being said. Write down just enough to let you recall those ideas. A thoughtful person will have a prepared summary for you when a lot of detail is presented.

Develop the habit of listening for ideas.

Keep in mind that the more senses - eyes, ears, mouth, nose, touch are involved, the more effective communication becomes.

Answer to Question 9:

Premature dismissal - or the habit of deciding in advance this subject is not important. We can close our mind to whatever the speaker has to offer. An open approach will be to correct this habit. If we listen closely, even an uninteresting or boring person may have an idea we can use.

Answer to Question 10:

Deceived by appearance or personal habits. just because a person may not look like your image of an authority does not mean she isn't. Some of our greatest scientists, artists, musicians, have not been impressive in either appearance or manner. If you must be mentally critical, wait for the person to speak. You will find by concentrating on what is being said that you will no longer be aware of the person's appearance.

Listen for ideas... then be critical.



ASSUMPTIONS

Please read the following stories and decide if the statements made about the stories are true (T), or false (F) or an assumption (?). Circle your answer in the margin.

Story 1

You are late one evening and see that the lights are on in your living room. There is only one car parked in front of your house and the words "Harold R. Jones, MD" are spelled in small gold letters across one of the car's doors.

- T F ? 1. The car parked in front of your house has lettering on one of it's doors.
- T F ? 2. Someone in your family is sick.
- T F ? 3. No car is parked in front of your house.
- T F ? 4. The car parked in front of your house belongs to a man named Jones.

Story 2

A businessman has just turned of the lights in the store when a man appeared and demanded money. The owner opened the cash register. The contents of the cash register were scooped up and the man dashed away. A member of the police force was promptly notified.

- T F ? 5. A man appeared after the owner had turned off the lights in the store.
- T F ? 6. The robber was a man.
- T F ? 7. The man did not demand money.
- T F ? 8. The man who owned the store opened the cash register.
- T F ? 9. The store owner scooped up the contents of the cash register and ran away.
- T F ? 10. Someone opened the cash register.
- T F ? 11. After the man who demanded money scooped up the contents of the cash register, he ran away.
- T F ? 12. While the cash register contained money, the story doesn't say how much.
- T F ? 13. The robber demanded money from the owner.
- T F ? 14. The story concerned a series of events in which only three persons are referred to: the owner of the store, a man who demanded money and a member of the police force.

Information obtained from Rural Development USDA



ASSUMPTIONS ANSWERS

1. T
2. ?
3. F
4. ?
5. ?
6. ?
7. F
8. ?
9. ?
10. T
11. ?
12. ?
13. ?
14. ?



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Communication Process: Overview

One process common to all groups is communication. Although there are a variety of definitions, we are defining it as the transmission of information from one person to another in a face-to-face setting and including both verbal and nonverbal interaction.

Communication in healthy, well-functioning groups has four important features--openness, full participation, trust and honesty in expressing feelings.

Openness in communication

Openness means sharing information needed to get work done or feelings resulting from interaction of group members working together. Confiding or confessing are often mistaken for openness of communication. Rather, through open communication, group members gain information needed for effective accomplishment of its work and for the development of group-centered orientation, attitudes and behaviors.

Trust

Openness of communication sometimes involves taking risks. Trust is an important feature of interpersonal communication if group members are to be open toward one another. If group members trust one another, fear of being ridiculed or "put down" is diminished - communication is healthy.

Full participation

Healthy groups value contributions, opinions, feelings and ideas of all members. Individual members are viewed as important resources for accomplishing goals and tasks. Since some people tend to be quieter than others, everyone needs to take responsibility to include them in the conversation.

Expressing feelings

People working together in groups experience feelings about one another, positive and negative. Feelings of anger, frustration and embarrassment are more difficult for many to express than are feelings of satisfaction and pleasure. Information about member feelings is important to a group.

Freeing and Binding Communications

Communication among members of a group is facilitated by some kinds of responses and inhibited by others. Freeing responses encourages openness of communication, trust and, thus, full participation. Binding responses inhibit openness and trust. Some examples of freeing responses are:

- Paraphrasing to check if you are hearing what is said
- Perception checking to see if your impressions of others' feelings are accurate

- Describing behaviors which influence you
- Describing your feelings about others communication; these are often called "I" messages.

Following this overview are specific examples for each of these four skill areas.

Some examples of inhibiting or binding responses are:

- Changing the subject without explanation
- Attributing motives to others
- Advising and persuading
- Judging and criticizing others
- Expressing approval or disapproval of others based upon your own standards

If you watch for freeing and binding responses, it will give you a good sense of the health of the communication processes.

It is important for the group leader to help improve communication. Think about the communication processes in client groups you are working with.

Do you observe

- People continually trying to make their position known and persuading others of its merits, talking past one another and unwilling to hear what others say?
- Unpleasant feelings remaining hidden?
- Feelings of others being ignored-little checking to find out what they are?
- Voices easily becoming loud and emphatic regardless of the issue?
- Seeing outsiders and their views as threats?
- A lot of talk about trivial issues with little attention to important ones?

Or do you observe...

- People continually checking to make sure they understand what others are saying and speaking to relevant issues?
- People showing concern for the feelings of others checking the accuracy of impressions?
- Voices remaining calm unless the issue is sensitive or very controversial?
- Continually listening to views of others outside the group?
- Important and fundamental issues and differences are common topics of conversation?

As a leader, careful observation and analysis of your groups will give you important information you can use to determine how to assist them to establish healthy patterns of interpersonal communication.



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Paraphrase

A Basic Communication Skill for Improving Interpersonal Relationships

The Problem: Tell somebody your phone number and he will usually repeat it to make sure he heard it correctly. However, if you

make a complicated statement, most people will express agreement or disagreement without trying to insure that they are responding to what you intend. Most people seem to assume that what they understand from a statement is what the other intends.

How do you check to make sure that you understand another person's ideas, information, or suggestions as he intended them? How do you know that his remark means the same to you as it does to him?

Of course, you can get the other person to clarify his remark by asking "What do you mean?" or "Tell me more," or by saying "I don't understand." However, after he has elaborated you still face the same question. "Am I understanding his idea as he intended it to be understood?" Your feeling of certainty is no evidence that you do in fact understand.

The Skill: If you state in your own way what his remark conveys to you, the other can begin to determine whether his message is coming through as he intended. Then, if he thinks you misunderstand, he can speak directly to the specific misunderstanding you have revealed. I will use the term "paraphrase" for any means of showing the other person some of the meanings you got from what he said.

Paraphrasing, then, is any way of revealing your understanding of the other person's comment to test your understanding.

An additional benefit of paraphrasing is that it lets the other know that you are interested in them. It is evidence that you do want to understand what he means. If you can satisfy the other that you really do understand his point, he will probably be more willing to attempt to understand your views. Paraphrasing, thus, is crucial in attempting to bridge the interpersonal gap. (1) It increases the accuracy of communication, and thus the degree of mutual or shared understanding. (2) The act of paraphrasing itself conveys feeling-your interest in the other, your concern to see how he views things.

Learning to paraphrase: People sometimes think of paraphrasing as merely putting the other person's ideas in another way. They try to say the same thing with different words. Such word-swapping may merely result in an illusion of mutual understanding, as in the following example.

Sara: Jim should never have become a teacher.

Fred: You mean teaching isn't the right job for him"

Sarah: Exactly! Teaching is not the right job for Jim.

Instead of trying to re-word Sarah's statement, Fred might have asked himself, "What does

Sarah's statement mean to me?" In that case the interchange might have sounded like this.

Sarah: Jim should never have become a teacher.

Fred: You mean he is to harsh on the children? Maybe even cruel?

Sarah: Oh, no. I meant that he has such expensive taste that he can't ever earn enough as a teacher.

Fred: Oh, I see. You think he should have gone into a field that would have insured him a higher standard of living.

Sarah: Exactly, teaching is not the right job for Jim.

Effective paraphrasing is not a trick or a verbal gimmick. It comes from an attitude, a desire to know what the other means. And to satisfy this desire you reveal the meaning his comment had for you so that the other can check whether it matches the meaning he intended it to convey.

If the other's statement was general, it may convey something specific to you.

Larry: I'd certainly like to own this book.

You: Does it have useful information in it?

Larry: I don't know about that; I mean the binding is beautiful.

Possibly the other's comments suggests an example to you.

Laura: This text has too many omissions; we shouldn't adopt it.

You: Do you mean, for example, that it contains nothing about the Negro's role in the development of America?

Laura: Yes, that's one example. It also lacks any discussion of the development of the arts in America

If the speaker's comment was very specific, it may convey a more general idea to you.

Ralph: Do you have 25 pencils I can borrow for my class?

You: Do you want something for them to write with? I have about 15 ball-point pens and 10 or 11 pencils.

Ralph: Great. Anything that will write will do.

Sometimes the other's idea will suggest its reverse or opposite to you.

Stanley: I think the Teacher's Union acts irresponsibly because the Administration has ignored them so long.

You: Do you mean that the T.U. would be less militant now if the Administration had consulted with them in the past?

Stanley: Certainly. I think the T.U. is being forced to more and more desperate measures.

To develop your skill in understanding others, try different ways of (1) conveying your interest in understanding what they mean, and (2) revealing what the other's statements mean to you. Find out what kinds of responses are helpful ways of paraphrasing for you.

The next time someone is angry with you or is criticizing you, try to paraphrase until you can demonstrate that you understand what he is trying to convey as he intends it. What effect does this have on your feelings and on his?

An exercise for practicing this skill

- 1. Divide the group of people into groups of three.
- 2. Person #1 will make a statement
Person #2 will paraphrase the statement
Person #3 will observe and comment
- 3. Do this three times, so each member of the triad gets to play each role.

Remember: learning best occurs through doing, so practice will teach you more effectively than reading.



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Perception Check

In perception check, you describe what you perceive to be the other's inner state in order to check whether you do understand what he feels. That is, you test to see whether you have decoded his expressions of feeling accurately. You transform his expressions of feeling into a tentative description of his feeling. A good perception check conveys the message,

"I want to understand your feelings-is this (making a description of his feelings) the way you feel?"

Examples:

"I get the impression you are angry with me?" This is mind reading, not perception checking.

"Am I right that you feel disappointed that nobody commented on your suggestion?"

"I'm not sure whether your expression means that my comment hurt your feelings, irritated you, or confused you."

Note that a perception check (1) describes the others feelings, and (2) does not express disapproval or approval. It merely conveys, this is how I understand your feelings. Am I accurate?"



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Behavior Description

A basic Communication Skill for Improving Interpersonal Relationships

The Problem: If you and another person are to discuss the way you work together or what is happening in your relationship, both of you

must be able to talk about what each of you does that affects the other. This is not easy. Most of us have trouble describing another's behavior clearly enough that he can understand what actions of his we have in mind.

Instead of describing the other person's behavior, we usually discuss his/her attitude, motivations, traits, and personality characteristics. Often our statements are more expressive of the way we feel about his/her behavior. And yet we may be unaware of our feelings at that time.

Let's suppose you tell me that I am rude (a trait) or that I don't care about your opinion (my motivation). Because I am not trying to be rude and because I feel that I do care about your opinion, I have not moved closer to a shared understanding. However, if you point out that several times in the past few minutes I have interrupted you and have overridden you before you could finish what you were saying, I would receive a clearer picture of what actions of mine were affecting you.

The skill: Behavior description means reporting specific, observable actions of others without (1) placing a value on them as right or wrong, bad or good, or (2) making accusations or generalizations about the others motives, attitudes, or personality traits.

You try to let others know to what behavior you are responding by describing it clearly enough and specifically enough that others know what you observed. To do this you must describe visible evidence-actions that are open to anybody's observation. Sometimes, for practice, it is helpful to try beginning your description "I see that..." or "I notice that..." or "I heard you say...." to remind yourself that you are trying to describe specific actions.

Examples:

- **"Jim, you've talked more than others on this topic. Several times you cut others off before they had finished."**
- **Not:** "Jim, you're too rude!" which names a trait and gives no evidence.
- **Not:** "Jim, you always want to hog the center of attention." which imputes an undesirable motive or intention.
- **"Bob, you've taken the opposite of nearly everything Harry has suggested today."**
- **Not:** "Bob, you're just trying to show Harry up," which is an

accusation of undesirable motivation.

- Not: "Bob, you're being stubborn," which is name calling.
- "Bob, earlier today when I was worried about whether I could perform well, you told me about a thing you saw me do that you thought I did competently, that made me feel much better."
- Not: "Bob, you're really a nice guy!" This tells Bob you like him, but it merely puts him in a category and does not tell him what you liked about his action.
- Not: "Bob, you go out of your way to say comforting things to people." This imputes a particular motive to Bob. But his intention may have been primarily to help you keep in contact with evidence and with the perceptions of the rest of the group, and only secondarily to be comforting.
- "Sam, you cut in before I had finished." The word "deliberately" implies that Sam knowingly and intentionally cut you off. All that anybody can observe is that he did cut in before you had finished.
- Not: "Sam, you deliberately didn't let me finish."

Several members of the group had told Ben that he was too arrogant Ben was confused and puzzled by this judgement. He was confused because he didn't know what to do about it; he didn't feel arrogant or scornful of the others. In fact, he admitted that he really felt nervous and unsure of himself. Finally, Joe commented that Ben often laughed explosively after Ben made a comment that seemed to have no humorous aspects. Ben said he had been unaware of this. Others immediately recognized that this was the behavior that made them perceive Ben as looking down on them and, therefore, arrogant. The pattern, thus, was as follows:

- Ben's feelings of insecurity expressed themselves in an explosive laugh after Ben made a statement
- Ben's laughter caused the other person to feel put down and humiliated
- the other person perceived Ben as laughing at him
- the other person said Ben was arrogant
- Note that Ben had no awareness of his own behavior which was being misread until Joe accurately described what Ben was doing.



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Use of "I" Messages

Effective communication is a skill which can be learned and practiced. "I" messages are most helpful when you have a problem with another person or when you have a concern or feeling based on his or her behavior.

Definition: Speaker identifies his/her own specific feeling as a result of a specific behavior or event.

"I" messages have two parts: Feelings - "I felt angry and disappointed..."

Behavior or Event- "When I arrived at the meeting on time this morning and no one else was there..."

A combination of "I" messages and "active listening" achieves effective communication by providing clarity for each speaker and keeping communication channels open.

"I" messages are effective because:

1. they place responsibility with the sender of the message
2. they reduce the other person's defensiveness and resistance to further communications
3. they provide information about the other person's behavior but do not evaluate it
4. they help promote open communication in work and personal relationships
5. they build trust, create empathy and facilitate understanding between sender and receiver

A word of warning: "I think you..."

"I feel you..."... are not "I" messages.

When you are not describing your own feelings as you send a message, you may be evaluating, ordering or blaming the other person. When you are blaming someone else, you are sending "you" messages. **"You" messages are ineffective because:**

1. they label the receiver instead of describing your feelings
2. they put the receiver on the defensive against a negative answer
3. they tend to create inhibitions and closed behavior because they build distrust.

*Information obtained from **Unlock Your Leadership Potential**. Produced by the Department of Family, Youth and Community Sciences, University of Florida Cooperative Extension, Institute of Food and Agricultural Sciences, April, 1997.*



I/YOU MESSAGES

Change the following YOU messages to a more positive I message.

Example:

1. <i>You never call me.</i>	1. <i>I wish you would call me more often.</i>
2. You need to grow up!	2.
3. You don't listen to me!	3.
4. Everyone here hates me!	4.
5. That's a dumb idea.	5.
6. You always argue with me.	6.
7. No one does anything here.	7.
8. You annoy me; go away!	8.
9. Leave me alone!	9.
10. You never have time for me.	10.
11. You lied to me.	11.
12. Who invited you?	12.
13. Get out of my room!	13.
14. You never knock first!	14.
15. Shut up and quit complaining.	15.
16. You did a horrible job.	16.
17. You make me so mad!!	17.
18. How could you do this to me?	18.
19. You worry me to death.	19.
20. You are so inconsiderate!	20.



I/YOU MESSAGES ANSWER KEY

(There can be more than one correct answer for each “I” message; this is only a guideline for examples).

2. I think you are more mature than you act sometimes.
3. Sometimes I feel I am not being listened to.
4. I sometimes feel people dislike me.
5. Maybe we could try a different idea.
6. I feel hurt and upset when I think you are trying to argue with me.
7. Let's everyone work hard together.
8. I need some time to myself right now.
9. I'm very busy right now. Can we talk another time?
10. I feel that you don't have time for me anymore. Is something wrong?
11. I don't think that I was told the complete truth.
12. I didn't know you were coming.
13. My room is my personal space. I would like to be alone right now.
14. I like when people knock first before coming in. Could you know first next time?
15. I need some peace and quiet; I don't like it when people are so negative.
16. I think you can do a little better.
17. I get angry at you sometimes when you...
18. I am sometimes hurt by the things you do.
19. I worry about you so much.
20. Sometimes I think you don't consider how I feel.



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Practice test for identifying "you" and "I" messages

Instructions: Determine which of the following statements are "You" messages and which are "I" messages. Mark a "Y" next to those that you consider "you" messages and "I" next to the "I" messages.

1. I know we usually have a freewheeling discussion, but frankly, I've got to present a concrete proposal today, so I really feel pressured for time. _____
2. I felt excited by the book even if it dragged a little. _____
3. I think you've got to be more forceful. _____
4. Your proposal simply doesn't cut the mustard. _____
5. You did a fine job on your proposal. _____
6. I liked your idea; it turned me on. _____
7. I'm angry and frustrated by the program. _____
8. I wish you hadn't put me on the spot like that. _____
9. I get nervous when I have to answer a question and I'm not prepared. _____
10. I don't feel you're doing your best. _____
11. I'm scared of failing. _____
12. Are you having hard enough to make this program work? _____

Summary - a Self-Quiz on Freeing/Binding Messages

Which of these sentences do you think block further communication? Which might help free up more discussion?

1. If I were you, I'd avoid that job like the plague.
2. You've suggested a new way for me to look at this.
3. You deliberately misquoted her!
4. I wonder if my comment put you down.
5. I don't understand your last point.
6. You're absolutely right!

7. I don't agree with your opinion, because..
8. After all I've done, and now you're quitting.
9. I wonder how you feel about that idea.
10. The answer is right there in your Administrative Manual.
11. What will you do differently next time?
12. That's my responsibility.
13. Let me help you.
14. I don't agree with your recommendation because I can't afford the cost.
15. You think it takes too much time, huh?
16. You always have a pleasant telephone manner.
17. Your opinion is just like Jack's.
18. I can't understand why that comment should offend you.
19. Wife: "Wow, what a day!" ----- Husband: "I can't find the TV guide."
20. "Here are some things I think about."

Adapted from Communications in Community Groups by Robinson, Clifford, and Moorehead

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[Summary on Communication Skills](#)



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Summary on Communication Skills

Helpful Questions The questions below can be used to help clarify ideas and to facilitate group discussion.

1. To clarify purpose, ask

- What is your goal in suggesting or using this idea?
- What are you after?
- Why would you be doing it?

2. To clarify definitions, ask

- What do you mean when you say that.?
- What would be some examples of your idea?

3. To clarify the sources of someone's ideas, ask

- What groups or authors agree with you?
- Where were these ideas started?
- Where could we get data to support your ideas?
- Is that based on personal experience, or data, or on both?

4. To expand information about the idea, ask

- Could we hear more?
- How might we find out more about your views?
- How can we help you build your ideas?
- Do you have other reasons for saying that?
- What would be examples of your idea?

5. To clarify how long the person has held an idea, ask

- Is this a current belief you hold?
- Have you been feeling this way long?
- Do you feel you will always think that?

6. To clarify crucial factors, ask

- Which event was most significant in causing you to feel this way?
- What incident aided you most in forming your point of view?

7. To point out inconsistencies, ask

- Is this consistent with other points of view you have expressed?

8. To question the usefulness of an idea, ask

- Would it be beneficial for us?
- Could we make that idea work for our group?
- Is it something you (value) (like) (need)?
- What are some bad aspects of the idea?

9. To consider consequences, ask

- If we were to use your idea, what might we anticipate?

If implemented, would your idea create a better situation?
Where will your idea take us?

10. To clarify the strength of an idea, ask

How sure are you?
Could any other points of view be valid?

11. To consider alternatives, ask

What other choices might the group make?
Was this your only choice?
What other possibilities are there?

12. To point out similarities and dissimilarities of ideas, ask

In what way is your idea similar to Bill's?
Where do you and Bill differ?

13. To summarize, ask

Can one of you recall the facts we discussed?
Who can play back the data we have uncovered?

14. To provide an opportunity for insight and evaluation, ask

If given the opportunity to present this idea again, what would you do differently?
How did you feel while we were discussing this idea?
Would you share an idea with this group again?

15. To encourage people to share other ideas, ask questions which would

Help a group test to see if one member's belief is universally accepted
Test limitations of a person's ideas
Give a person the chance to list exceptions to his or her ideas
Encourage a person to list alternatives to an idea
Bring out evidence counter to a person's ideas
Cause a group to locate inconsistencies in a proposal
Cause persons to inspect the credibility of their information sources



Community Leader Guide



Strategies for Conflict

Conflict is a fact of life. The more people you deal with, the greater your chance of experiencing differences of opinion. In community development, some level of conflict is inevitable.

The positive thing about conflict is that it creates a high level of interest; that is, it makes a topic "hot." Heat generates energy and time. Sometimes a community leader will purposefully "heat up" a situation to attract energy. Properly handled, conflict can produce a progress in a group or community by allowing different ideas to come forward. As a result, people learn more about one another and think about a situation differently. New solutions can be created.

The negative thing about conflict is that it can create such discomfort that people retreat into small "war camps" to protect themselves. When people feel threatened, they tend to stop listening. When conflict results in a breakdown in communication (certain groups are no longer talking to or listening to one another), polarization occurs. This can retard progress, sometimes for many years.

The important thing is to be clear about the conflict and have a strategy to deal with it. At the strategy level, there are five general ways to deal with conflict:

- **Avoidance:** Ignore the conflict and hope it goes away.
- **Accommodation:** Give in to the person who disagrees with you. (maybe they are right, or "peace at all costs")
- **Compromise:** You give a little and the other party gives a little. This is one of the most common ways people deal with conflict. The problem here is that neither party may get what they actually wanted.
- **Competition:** Fight for your interests at all cost. Go on strike, start a war, take it to court. The problem here is that the losing party may come back to haunt you at a future date. You may win the first battle, but lose the second.
- **Collaboration:** Interest-based bargaining is a process by which both sides of a conflict listen and learn from one another. Out of their increased understanding, they create a solution which works best for both parties.

Depending upon the specific situation, any one of these strategies might be appropriate. For instance, if the conflict will go away if you ignore it and/or it is not important to you, avoidance might be a good strategy. If, on the other hand, the issue at stake is extremely important to you, competition may be your chosen strategy. If, as is often the case in community development situations, success may depend on achieving cooperation between several groups, then **compromise** or **collaboration** may be the best approaches regardless of your personal opinion regarding the conflict.

Conflict Management Skills

Regardless of the strategy you use, good communication skills are always important. Basic skills to resolve conflicts include:

1. **Talk directly:** Assuming that there is no threat of physical violence, talk directly to the person with whom you have the problem. Direct conversation is much more effective than sending a letter, banging on the wall, throwing a

- rock, or complaining to everyone else.
2. **Choose a good time:** Plan to talk to the other person at the right time and allow yourselves enough time for a thorough discussion. Don't start talking about the conflict just as the other person is leaving for work, after you have had a terrible day, or right before you have to make dinner. Try to talk in a quiet place where you both can be comfortable and undisturbed for as long as the discussion takes.
 3. **Plan ahead:** Think out what you want to say ahead of time. State clearly what the problem is and how it affects you (i.e., interests, concerns, etc.).
 4. **Don't blame or namecall:** Antagonizing the other person only makes it harder for him or her to hear you. Don't blame the other person for everything or begin the conversation with your opinion of what should be done.
 5. **Give information:** Don't interpret the other person's behavior: "You are blocking my driveway on purpose just to make me mad!" Instead, give information about your own feelings: "When your car blocks my driveway, I get angry because I can't get to work on time."
 6. **Listen:** Give the other person a chance to tell his or her side of the conflict completely. Relax and listen; try to learn how the other person feels.
 7. **Show that you are listening:** Although you may not agree with what is being said, tell the other person that you hear him or her and are glad that you are discussing the problem together.
 8. **Talk it all through:** Once you start, get all of the issues and feelings out into the open. Don't leave out the part that seems too "difficult" to discuss or too "insignificant" to be important. Your solution will work best if all issues are discussed thoroughly.
 9. **Work on a solution:** When you have reached this point in the discussion, start working on a solution. Two or more people cooperating are much more effective than one person telling another to change. Be specific: "I will turn my music off at midnight" is better than a vague, "I won't play loud music anymore."
 10. **Follow through:** Agree to check with each other in specific times to make sure that the agreement is working...then really do it.



Community Leader Guide



Communications Review

Communications Review			
	I am good at	I am fair at	I need help with
1. Listening to others			
2. Making people feel comfortable			
3. Paraphrasing			
4. Checking my perceptions of another person's feelings			
5. Describing others' behavior and how it influences my feelings or actions			
6. Expressing my feelings			
7. Expressing my ideas clearly			
8. Accepting a compliment			
9. Accepting negative feedback			
10. Helping a group deal with conflict appropriately			
11. Understanding my own style of dealing with conflict			



Community Leader Guide



Conflict-Management Style Survey

Conflict-Management Style Survey			
Name: _____		Date: _____	
<p>Instructions: Choose a single frame of reference for answering all fifteen items (e.g., working-related conflicts, family conflicts, or social conflicts) and keep that frame of reference in mind when answering the items. Allocate 10 points among the four alternative answers given for each of the fifteen items below.</p>			
<p>Example: When the people I supervise become involved in a personal conflict, I usually:</p>			
Intervene to settle the dispute.	Call a meeting to talk over the problem	Offer to help if I can	Ignore the problem
<u>3</u>	<u>6</u>	<u>1</u>	<u>0</u>
Be certain that your answers add up to 10.			
1. When someone I care about is actively hostile toward me, i.e., yelling, threatening, abusive, etc, I tend to:			
Respond in a hostile manner. _____	Try to persuade the person to give up his/her actively hostile behavior. _____	Stay and listen as long as possible. _____	Walk away. _____
2. When someone who is relatively unimportant to me is actively hostile toward me, i.e., yelling & threatening, abusive, etc, I tend to:			
Respond in a hostile manner. _____	Try to persuade the person to give up his/her actively hostile behavior. _____	Stay and listen as long as possible. _____	Walk away. _____
3. When I observe people in conflicts in which anger, threats, hostility, and strong opinions are present, I tend to:			
Become involved and take position. _____	Attempt to mediate. _____	Observe to see what happens. _____	Leave as quickly as possible. _____
4. When I perceive another person as meeting his/her needs at my expense, I am apt to:			
Work to do any-thing I can to change that person. _____	Rely on persuasion and "facts" when attempting to have that person change. _____	Work hard at changing how I relate to that person. _____	Accept the situation as it is. _____
5. When involved in an interpersonal dispute, my general pattern is to:			
Draw the other person into seeing the problem as I do. _____	Examine the issues between us as logically as possible. _____	Look hard for a workable compromise to work itself out. _____	Let time take its course and let the problem work. _____
6. The quality that I value the most in dealing with conflict would be:			
Emotional strength and security. _____	Intelligence. _____	Love and openness. _____	Patience. _____
7. Following a serious altercation with someone I care for deeply, I:			

Strongly desire to go back and settle things my way. _____	Want to go back and work it out whatever give-and-take is necessary. _____	Worry about it a lot but not plan to initiate further contact. _____	Let it lie and not plan to initiate further contact. _____
8. When I see a serious conflict developing between two people I care about, I tend to:			
Express my disappointment that this has to happen. _____	Attempt to persuade them to resolve their differences. _____	Watch to see what develops. _____	Leave the scene. _____
9. When I see a serious conflict developing between two people who are relatively unimportant to me, I tend to:			
Express my disappointment that this has to happen. _____	Attempt to persuade them to resolve their differences. _____	Watch to see what develops. _____	Leave the scene. _____
10. The feedback that I receive from most people about how I behave when faced with conflict and opposition indicates that I:			
Try hard to get my way. _____	Try to work out differences cooperatively position. _____	Am easygoing and take a soft or conciliatory. _____	Usually avoid the conflict. _____
11. When communicating with someone with whom I am having a serious conflict, I:			
Try to overpower the other person with my speech. _____	Talk a little bit more than I listen. (feelings). _____	Am an active listener (feeding back words and. _____	Am a passive listener (agreeing and apologizing). _____
12. When involved in an unpleasant conflict, I:			
Use humor with the other party. _____	Make an occasional quip or joke about the situation or the relationship. _____	Relate humor only to myself. _____	Suppress all attempt at humor. _____
13. When someone does something that irritates me (e.g., smokes in a nonsmoking area or crowds in line in front of me), my tendency in communicating with the offending person is to:			
Insist that the person look me in the eye. _____	Look the person directly in the eye contact. _____	Maintain intermittent eye the person. _____	Avoid looking directly at. _____
14.			
Stand close and make physical contact. _____	Use my hands and body to illustrate my points for her. _____	Stand close to the person without touching him. _____	Stand back and keep my hands to myself. _____
15.			
Use strong direct language and tell the person to stop. _____	Try to persuade the person to stop. feelings are. _____	Talk gently and tell the person what my. _____	Say and do nothing. _____
Total _____	Total _____	Total _____	Total _____



Community Leader Guide



Conflict-management style survey

scoring and interpretation sheet

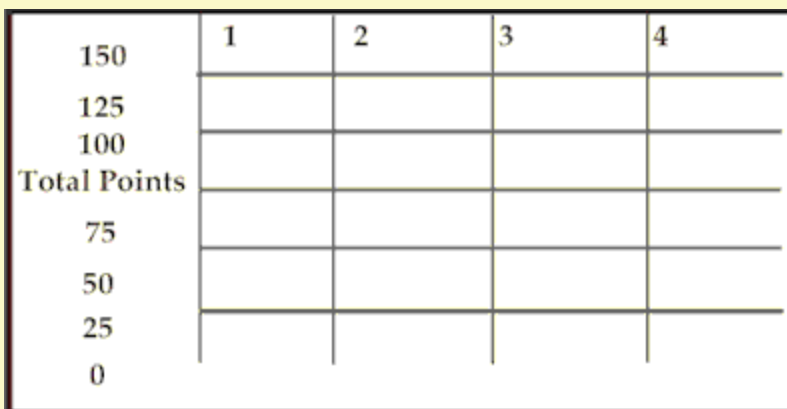
Instructions: When you have completed all fifteen items, add your scores vertically, resulting in four column totals.

Put these on the blanks below.

Totals: _____

Column 1 Column 2 Column 3 Column 4

Using your total scores in each column, fill in the bar graph below.



Column 1. Aggressive/Confrontive. High scores indicate a tendency toward "taking the bull by the horns" and a strong need to control situations and/or people. Those who use this style are often directive and judgmental.

Column 2. Assertive/Persuasive. High scores indicate a tendency to stand up for oneself without being pushy, a proactive approach to conflict, and a willingness to collaborate. People who use this style depend heavily on their verbal skills.

Column 3. Observant Introspective. High scores indicate a tendency to observe others and examine oneself analytically in response to conflict situations as well as a need to adopt counseling and listening modes of behavior. Those who use this style are likely to be cooperative, even conciliatory.

Column 4. Avoiding/Reactive. High scores indicate a tendency toward passivity or withdrawal in conflict situations and a need to avoid confrontation. Those who use this style are usually accepting and patient, often suppressing their strong feelings.

Now total your scores for Columns 1 and 2 and Columns 3 and 4.

Column 1 + Column 2 = _____A Column 3 + Column 4 = _____ B

If Score A is significantly higher than Score B (25 points or more), it may indicate a tendency toward aggressive/assertive conflict management. A significantly higher B score signals a more conciliatory approach.

Source: Marc Robert, University Associates

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[Strategies for Conflict](#)



Community Leader Guide



Introduction: Team Building

Most work occurs, at some point, in a group. Groups have a "life of their own." That is, groups are more than the sum of the individuals who compose them. This section talks about some of the stages a group may go through as it is becoming a true team that works well together. It provides a self quiz about "task" (the activity or work an individual or group carries out) and "maintenance" (the work of keeping human

relationships and communication healthy in the group while it carries out its tasks). The skills needed for tasks are somewhat different from those needed for group maintenance.

Understanding the stages of team development and the need to address both task and maintenance can enable you to provide **situational** leadership: leadership that changes according to the group situation.

An exercise to help a group develop a working agreement for team ground rules is provided as well as an assessment tool.

	Things I Need to Know About Team Building	Where Do I Find It?
1. Things I Need to Know >>>	1. Helping a group get "on task" to get work done	8 & 9
2. Stages of Group Development	2. Maintaining good group relationships	6 & 7
3. Leadership Styles	3. Recognizing the stage a group may be at (form, storm, norm, perform)	2
4. Situational Leadership	4. Identifying various leadership styles and behaviors	3
5. What is My Leadership Style?	5. Recognizing my most comfortable leadership style	5
6. Working Agreements	6. Changing my approach to meet different situations	4
7. Establishing Working Agreements	7. Helping a group establish procedures (meeting times, decision making, etc.)	6 & 7 & 8
8. How Productive Groups Communicate	8. Help members recall their agreements and progress at the beginning of the next meeting (recording and reviewing group agreements and other actions)	6 & 7 & 8
9. Team Effectiveness	9. Making sure all members have a chance to express their ideas	6 & 7 & 8
	10. Identifying behaviors in a group that are keeping it from achieving its goals	9

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[Stages of Group Development](#)



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Community Leader Guide



Stages of Group Development

There is a tendency for all groups to go through some predictable stages of growth. A new group, which is just forming in the community around shared concern for an issue, will go through some version of these stages. Even a group which has been intact for a long time may go through some aspects of these stages when they introduce new members, take on new leadership, or begin planning for a new

and unfamiliar situation.

These stages are summarized as follows:

Form: During this stage, group members are basically concerned with "what are we here for?" People will tend to look for a strong leader to get things moving in a new unstructured environment. Discussion will focus on different perceptions of the reason the group has come together, what types of information may be needed. People are "checking out" one another to decide whether they want to be a part of the group. Little work is normally accomplished at this stage because there is some anxiety about the new situation and a fair amount of confusion and how to proceed.

There are two important things to accomplish at this stage: 1) everyone needs to feel welcome and included, to have a sense that their opinions will be respected; 2) there needs to be some consensus, or group agreement, about the basic mission or goal they are seeking to work toward. The first item is called a "**maintenance**" concern (maintaining good group relations) and the second is a "**task**" concern (getting the work done).

Storm: Once members have "bought in to" the group and its goals, there tends to be a time when power plays occur regarding who will be in charge and what actions will be taken to reach a goal. The leadership established during the first stage may be challenged by other group members. Special interests in the group will try to assert themselves. There may be many different ideas about how to meet the goal. The resulting frustration about how to proceed may trigger intense feelings. Members will feel unstable at this time and there will be a sense of polarization in the group. Some groups may move through the storm phase in one meeting; other groups can stay stuck in this phase for years. The group facilitator can help the group most by getting conflict out in the open, encouraging good communication skills, and showing confidence that this is a healthy stage and one that the group will resolve.

Norm: By hammering out their differences, the group should reach general agreement on their roles in relationship to one another and the ground rules for how to get their work done. These ground rules, or "norms," will address both how people treat one another and how meetings are conducted (maintenance) as well as who will do what work and how work will get carried out (task).

At this stage, a leader or facilitator can become less directive. Members will feel comfortable and there will be a sense of team cohesiveness and common spirit. At the end of this chapter is a section on **working agreements**, which provides a step-by-step process for establishing group ground rules. The chapter on Planning also addresses how to get agreement on a plan of action.

Perform: Now that the team has established its norms, it becomes capable of diagnosing, solving problems and making decisions. This is the stage where a great deal of work can occur. Because of the growth in the earlier stage, the group can become increasingly creative. As new tasks emerge, the group tackles them confidently. The group can work as a full group as well as delegate work to task forces and individuals.

Initiative in leadership may come from any group member and most members share responsibility. Although it takes work to achieve a team, it is worth the efforts because of the high level of productivity that can occur over a long period of time.

Re-form: At some point, most groups return to the form stage, either because their original purpose has been achieved or because of membership/leadership turnover.

[Return to Team Building](#)

[Leadership Styles](#)



Community Leader Guide



Leadership Styles

Some studies of leadership have categorized group leaders in the following four categories:

Directive: Someone who is task-oriented and provides firm guidance about how to proceed toward accomplishing a goal. This style is not highly supportive in terms of encouraging individual efforts, and involving others in decision making. Sometimes this is called an authoritarian leadership style. It is high task, low maintenance.

Coach: Someone who is both highly directive on task but also highly supportive of individuals' feelings and participation. This style is high task/high maintenance.

Supporter: This type of leader/facilitator shows a great deal of confidence in the group's ability to carry out its task, while giving little direction on task. This style focuses on making sure everyone participates in the discussion. It is low task, high maintenance.

Delegator: Such a leader primarily "gives away" the work in the group, both task and maintenance areas (low/low). This is sometimes called a "laissez faire" style.

The next section shows which leadership styles might be most suitable at the different stages of group development. Changing your style according to the situation is called situational leadership.

[Return to Team Building](#)

[Summary: Situational Leadership for Team Development](#)



Community Leader Guide



Summary: Situational Leadership for Team Development

"Directing" is valuable in the **"Form"** stage

In general at the beginning of any small group, people are relatively eager to be there and have high expectations. There is some anxiety about the nature of the situation and they are looking for something they do not yet have, such as information, knowledge, skills, clarity of goals and roles, etc. People are usually feeling very dependent and look to the leader to satisfy their needs. Morale starts out at a fairly high level but decreases fairly rapidly during this stage. The work accomplished begins at a low point and gradually increases as understanding and competencies develop.

The leader behavior that is most important during this stage is to help the group with the task. This includes clarifying what the task is, setting realistic and attainable goals and planning for the acquisition of necessary skills. Clarifying group goals and tasks in a realistic way is especially important and is related to later morale. There is some need for some supportive behavior during this stage, especially related to acceptance by the leader and other members. However, the need for supportive behavior is much more moderate than the need for task-related behavior. Establishing an accepting atmosphere and shared leadership and decision making as the group progresses is important. Being overly personal and supportive at this stage can lead to unrealistic expectations and therefore greater disappointment during the next stage.

"Coaching" is valuable in the **"Storm"** stage

Stage 2 is never quite as clear as Stage 1, but is characterized primarily by a decline to some extent in the morale of the group and the gradual increase in task performance. The major morale issues are frustration, discouragement and sometimes anger about task success and competition among members and between the formal leader and members. There is often a testing of both the task and process goals and confusion about roles. Morale aspects can interfere with the task during this stage. The dissatisfaction comes from the discrepancies between the initial hopes and expectations and the realities of the situation.

The appropriate leader behaviors call for more balance between directive and supportive behaviors and high levels of both. Task behaviors may include redefining goals and expectations to make them more realistic and attainable, and continued training and coaching in skills and knowledge about task and group process. Supportive behaviors would include more active listening and encouraging input from members, acknowledging of difficulties and focusing on building supportive member relationships and group cohesion. The goal is to work toward less dependency and more self-sufficiency and competence not only about helping members develop task-related skills and knowledge but also, and of equal importance, is the development of interpersonal and group maintenance skills so that leadership functions can be shared. It is important to acknowledge and tolerate member dissatisfaction without denying them or taking them too personally. Denial or offensive behavior may unnecessarily escalate group members' feelings or drive them underground but will not resolve them.

"Supporting" is valuable in the **"Norm"** stage

This stage is characterized by increasing levels of morale, harmony and continued increase in task competence. There is less resistance, more comfort with the reality of the situation, a progressive internalization of goals and skills, more inclusion and

integration within the group, and fewer fears of rejection or incompetence. Collegiality and mutual respect increase as members begin to assume more of the leadership functions.

As the group moves from dissatisfaction through resolution there is a gradual shift in the leader's behavior with less emphasis on task and goal clarification and more emphasis on supporting and acknowledging the efforts of group members to assume both the task and group maintenance functions previously provided by the leader. There is less need to direct the group in its task and a slowly decreasing need for supportive behavior from the leader as members assume more and more of the maintenance functions and develop more confidence and cohesiveness. A difficult issue for many managers during this stage is to give up control over decisions and to trust the group to assume a partnership role in the process. The harmony and positive feelings that characterize this stage can be a block to further development if the group avoids conflict and disagreement for fear of losing cohesion. Continued encouragement of free expression of differences and valuing those differences will help the group move to stage 4.

"Delegating" is valuable in the **"Perform"** stage

Skills in both task and maintenance functions continue to increase during this stage. There is a mastering of task skills and internalization of goals. Positive feelings match or exceed initial desire. There is a high level of work on the task and more efficient use of time. Continued increase in skills and success in task accomplishment leads to positive feelings about the group and feelings of self-esteem and confidence. Group members work well together, can differ without competition and function autonomously without dependence on the leader.

For managers this can be a difficult stage because, to some extent, their special status in the group is eliminated. Monitoring goals and performance is still appropriate as is supporting the autonomous functioning of the group. In general there is less need for either directive or supportive behaviors and the leaders can turn their energies in other directions. Filling out the Task-People Leadership Questionnaire in the next section will help you (or people you are working with) think about your own leadership style and what skills you might need to work on if you are in a group needing a style different from what you are most comfortable with.

[Return to Team Building](#)

[T-P Leadership Questionnaire: An Assessment of Style](#)



Community Leader Guide



T-P Leadership Questionnaire: An Assessment of Style

Goal: To evaluate oneself in terms of task orientation and people orientation

Group size: Unlimited

Physical Setting: Participants should be seated at tables or desk chairs.

Materials

- I. T-P Leadership Questionnaire for each participant
- II. Pencil for each participant
- III. T-P Leadership-Style Profile Sheet for each participant

Process

- I. Without prior discussion, the facilitator asks participants to fill out the T-P Leadership Questionnaire.
- II. Before the questionnaires are scored, the facilitator presents a brief summary of leadership styles and group development.
- III. The facilitator announces that, in order to locate himself on the Leadership-Style Profile Sheet, each group participant will score his own questionnaire on the dimensions to task orientation (T) and people orientation (P).
- IV. The facilitator instructs the participants in the scoring as follows:
 1. Circle the item number for items 8, 12, 17, 19, 30, 31, 35.
 2. Write the number 1 in front of the circled item number if you responded s (seldom) or n (never)
 3. Also write a number 1 in front of item numbers not circled if you responded a (always) or f (frequently).
 4. Circle the number of 1's which you have written in front of the following items: 3, 5, 8, 10, 15, 18, 19, 22, 24, 26, 28, 30, 32, 34, 35.
 5. Count the circled number 1's. This is your score for concern for people. Record the score in the blank following the letter P at the end of the questionnaire.
 6. Count the uncircled number 1's. This is your score for concern for task. Record this number in the blank following the letter T.
- V. The facilitator distributes the Leadership-Style Profile Sheet and instructs participants to follow the directions on the sheet. He then leads a discussion of implications members attach to their location on the profile.

Variations

- I. Participants can predict how they will appear on the profile prior to scoring the questionnaire.
- II. Paired participants already acquainted can predict each other's scores. If they are not acquainted, they can discuss their reactions to the questionnaire items to form some bases for this prediction.
- III. The leadership styles represented on the profile sheet can be illustrated through role-playing. A relevant situation can be set up, and the "leaders" can be coached to demonstrate the styles being

studied.

IV.

Subgroups can be formed of participants similarly situated on the shared leadership scale. These groups can be assigned identical tasks to perform. The data generated can be processed in terms of morale and productivity.

[Return to Team Building](#)

[T-P Leadership Questionnaire](#)



T-P Leadership Questionnaire

Directions: The following items describe aspects of leadership behavior. Respond to each item according to the way you would most likely act if you were the leader of a work group. Circle whether you would most likely behave in the described way: always (a), frequently (f), occasionally (o), seldom (s), or never (n).

a f o s n 1. I would most likely act as spokesman of the group.

a f o s n 2. I would encourage overtime work.

a f o s n 3. I would allow members complete freedom in their work.

a f o s n 4. I would encourage the use of uniform procedures.

a f o s n 5. I would permit the members to use their own judgement in solving problems.

a f o s n 6. I would stress being ahead of competing groups.

a f o s n 7. I would speak as a representative of the group.

a f o s n 8. I would needle members for greater effort.

a f o s n 9. I would try out my ideas in the group.

a f o s n 10. I would let the members do their work the way they think best.

a f o s n 11. I would be working hard for a reward or recognition.

a f o s n 12. I would tolerate postponement and uncertainty.

a f o s n 13. I would speak for the group if there were visitors present.

a f o s n 14. I would keep the work moving at a rapid pace.

a f o s n 15. I would turn the members loose on a job and let them go to it.

a f o s n 16. I would settle conflicts when they occur in the group.

a f o s n 17. I would get swamped by details.

a f o s n 18. I would represent the group at outside meetings.

a f o s n 19. I would be reluctant to allow the members any freedom of action.

a f o s n 20. I would decide what should be done and how it should be done.

a f o s n 21. I would push for increased efficiency.

a f o s n 22. I would let some members have authority which I could keep.

a f o s n 23. Things usually turn out as I had predicted.

a f o s n 24. I would allow the group a high degree of initiative.

a f o s n 25. I would assign group members to particular tasks.

a f o s n 26. I would be willing to make changes.

a f o s n 27. I would ask the members to work harder.

a f o s n 28. I would trust the group members to exercise good judgement.

a f o s n 29. I would schedule the work to be done.

a f o s n 30. I would refuse to explain my actions.

a f o s n 31. I would persuade others that my ideas are to their advantage.

a f o s n 32. I would permit the group to set its own pace.

a f o s n 33. I would urge the group to beat its previous record.

a f o s n 34. I would act without consulting the group.

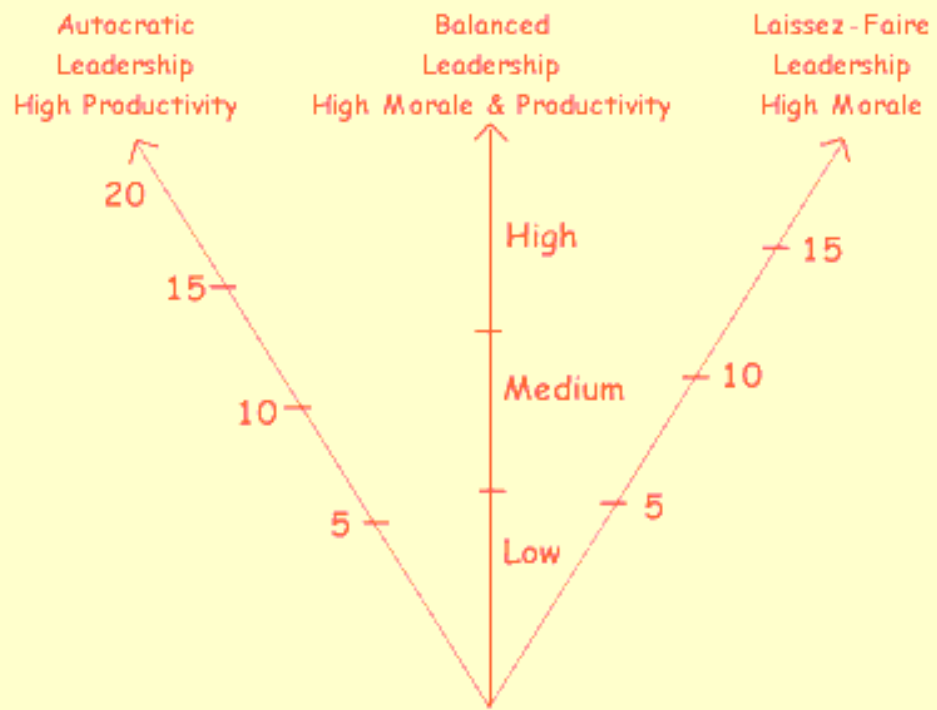
a f o s n 35. I would ask that the group members follow standard rules and regulations.

T _____ P _____

T-P Leadership Style Summary Sheet

Name _____ Group _____

Directions: To determine your style of leadership, mark your score on the concern for task dimension (T) on the left-hand arrow below. Next, move to the right-hand arrow and mark your score on the concern for people dimension (P). Draw a straight line that intersects the P and T scores. The point where that line crosses the balanced leadership arrow shows your score on that dimension.



Adapted from Wm. Pfeiffer and John Jones "Handbook of Structured Experiences" Vol. 1 Page 10, 1974



Community Leader Guide



Working Agreements

Regardless of its stage of development or the styles of its leaders, a group will be more effective when there is a clear understanding of expected behaviors from each member. These expectations are often called "working agreements." These agreements allow group members to clarify what is expected. It is important that each member have input into such agreements and a clear understanding of what is expected of his or her behavior.

Examples of Working Agreements:

Openness: Openness is not an end in itself, but a means to an end. I am willing to be open about my feelings and motives directly to the group.

Time: When team meetings are set, I will make every effort to be on time, come prepared, and help the group stay on task. If I am unable to attend, I will send my ideas, reports, or other material to the team.

Participation: Any member may ask for a survey of opinion at any time. The requesting member states what (s)he wants to know from the total group. Others may clarify the question. Each person then briefly states his/her current position on the topic (1 to 2 sentences). A call for a survey preempts other team action.

Decisions: Group decisions will be made by consensus. Consensus means that each member has had an opportunity to participate in the development of the decision and that all members are willing to "live with" the decision of the majority. It does not mean that the decision is everyone's first choice. To "live with" the decision means that all members agree to work toward the implementation of the decision.

Materials: For this project all materials and designs will be sent to _____ two weeks before our next meeting.

Reports: Each task force head will survey his/her workers on the designated topic and be prepared to give a brief report to the management team.

Washington State University, Organizational Development Specialist.

[Return to Team Building](#)

[An Exercise to Establish Working Agreements](#)



Community Leader Guide



An Exercise to Establish Working Agreements

Goal: To help a group agree on guidelines for how they work together **Group Size:** Twenty people or less. **Time Required:** One to one and one-half hours, depending on size of the group. **Materials:**

1. "Working Agreements" handout
2. Copies of the worksheet for each participant
3. Pencils, markers, newsprint, masking tape
4. If possible, use an overhead projector or white board so you can rewrite statements as the group talks. This is easier than using newsprint.

Process:

1. Review "Working Agreements" handout with the group.
2. Have the group fill out left half of worksheets (can modify) with instructions to focus on observable behaviors from this group or any past experience.
3. Translate each dislike into an "I Will" positive behavior statement.
4. Each person picks the top three preferred behaviors (rank 1, 2, 3).
5. Go around the group asking the first person to state his/her top priority. Remind the group that we are not here to debate the validity of a person's feelings, but to establish group agreement about effective behavior.
6. After the priority is written, ask if anyone else had the same or similar preferred behavior. Does the one written up state their idea completely? If not, modify. Once what is written represents the group, everyone can cross it off their list.
7. Ask the second person for a different priority and follow the same process.
8. Continue around the group until everyone's top three behaviors are covered.
9. Discuss what is listed until the group agrees that it wants to operate by each ground rule written. To cement the agreement, ask people to raise hands indicating that they personally agree to abide by these positive behavior ground rules in the group.

Ways to follow-up:

1. Type up results and distribute to everyone at next meeting.
2. Use information as a basis for an evaluation form so the group can monitor the degree to which they are following their agreements. See the "Team Effectiveness Critique" at the end of this chapter as an example.
3. Appoint a "bulldog" to remind group members when they are not adhering to the agreements.
4. Agree to take time for this subject at meetings so these desired goals become the norm for behavior.
5. Prepare a large poster to post at each meeting.

Working Agreements Worksheet

List behaviors that you dislike when working in a group	For each behavior that you dislike, list the corresponding preferred behavior "I will..."

[Return to Team Building](#)

[How Productive Groups Communicate](#)



Community Leader Guide



How Productive Groups Communicate

Why are some groups more successful than others? Why are some groups able to work together more easily than others? People who have worked with groups and studied group behavior report these differences. Check the group behaviors below that best represent your group, then discuss the responses.

In Productive Groups	In Less Productive Groups
<input type="checkbox"/> 1. People listen and pay attention to one another.	<input type="checkbox"/> 1. People do not listen and many tend to talk at the same time.
<input type="checkbox"/> 2. People discuss the subject at hand.	<input type="checkbox"/> 2. The discussion jumps from one idea to another.
<input type="checkbox"/> 3. Everyone's ideas and suggestions are welcomed.	<input type="checkbox"/> 3. Some member's ideas don't seem "to count," so these people do not act as if they belong to the group.
<input type="checkbox"/> 4. Everyone has a chance to state his or her view.	<input type="checkbox"/> 4. One or two people do all the talking.
<input type="checkbox"/> 5. The group uses its agenda as a guide for discussion.	<input type="checkbox"/> 5. The agenda is not clear and there is no written guide for discussion.
<input type="checkbox"/> 6. One or two members are appointed to summarize the discussion and to see that everyone has had a chance to speak.	<input type="checkbox"/> 6. No one summarizes or checks to see if everyone who wants to speak has actually spoken. Discussions go on and on until people get tired.
<input type="checkbox"/> 7. Members know and use problem-solving steps.	<input type="checkbox"/> 7. No order is followed for identifying and solving problems.
<input type="checkbox"/> 8. Members are clear about group decisions and committed to them.	<input type="checkbox"/> 8. Decision making is muddy and people are not committed to the group's plans.

[Return to Team Building](#)

[Team Effectiveness Critique](#)



Community Leader Guide



Team Effectiveness Critique

Instructions: Distribute this to each member in your group. Circle the number on each scale you feel is most descriptive of your team. Decide whether this is just for its most recent meeting or for how it generally functions. Have one person summarize the scores and report them to the group. Set aside time for group discussion of the results.

<p>1. Goals and Objectives There is a lack of commonly understood goals and objectives.</p>	<p>Team members understand and agree on goals and objectives.</p>
<p>2. Utilization of Resources All member resources are not recognized and/or utilized.</p>	<p>Members resources are fully recognized and used.</p>
<p>3. Trust and Conflict There is little trust among members and conflict is evident.</p>	<p>There is a high degree of trust among members and conflict is dealt with openly and worked through.</p>
<p>4. Leadership One person dominates and leadership roles are not carried out or shared.</p>	<p>There is full participation in leadership; leadership roles are shared by members.</p>
<p>5. Control and Procedures There is little control and there is a lack of procedures to guide team functioning.</p>	<p>There are effective procedures to guide team functioning; team members support these procedures and regulate themselves.</p>
<p>6. Interpersonal Communications Communications between members are closed and guarded.</p>	<p>Communications between members are open and participative.</p>
<p>7. Problem Solving The team has no agreed-on approaches to problem solving and decision making.</p>	<p>The team has well-established and agreed-on approaches to problem solving and decisions.</p>



8. Experimentation/Creativity

The team is rigid and does not experiment with how things are done.

The team experiments with different ways of doing things and is creative in its approach.



9. Task Completion The group does not get much done.

The group carries out its goals.



Source: Mark Alexander, University Associate

[Return to Team Building](#)

[Team Building Review](#)



Community Leader Guide



Team Building Review

Team Building Review			
	I am good at	I am fair at	I need help with
1. Helping a group get "on task" to get work done			
2. Maintaining good group relationships			
3. Recognizing the stage a group may be at (form, storm, norm, perform)			
4. Identifying various leadership styles and behaviors			
5. Recognizing my most comfortable leadership style			
6. Changing my approach to meet different situations			
7. Helping a group establish procedures (meeting times, decision making, etc.)			
8. Help members recall their agreements and progress at the beginning of the next meeting (recording and reviewing group agreements and other actions)			
9. Making sure all members have a chance to express their ideas			
10. Identifying behaviors in a group that are keeping it from achieving its goals			

[Return to Team Building](#)

[Planning](#)



Community Leader Guide



Introduction: Planning

Planning does not mean writing something on paper and forgetting about it. Planning is a step-by-step process that enables a group to agree on how to take meaningful action to solve a common problem or achieve a desired improvement.

- [1. Strategic Planning](#)
- [2. Visioning and Organizational Mission](#)
- [3. Community Assessment](#)
- [4. Goals and Objectives](#)
- [5. Action Plans](#)
- [6. Monitoring and Evaluation](#)

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[Strategic Planning](#)



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Community Leader Guide



Strategic Planning

What is Strategic Planning?

Strategic planning is a systematic effort by an organization or a community to envision its desired future and plot a course of action for realizing that future. This type of planning implies widespread participation and a review of the environment.

Planning also occurs in "smaller chunks" when a group is trying to solve a specific problem or reach a desired goal but is not needing to question the overall future or purpose of the group. Planning is basically the same as problem solving and is an ongoing activity in most organizations and businesses. The strategic planning process is essentially a democratic process in which power is distributed equally among the participants.

Why Plan?

Our world is changing more rapidly than ever. We have more information about options, the economy is shifting, and our families are changing. The more change occurs, the more important it is to plan and to revisit our old plans. History and great leaders have taught us that visions of the future have great power. Studies show us that businesses with strategic plans outperform their counterparts which lack formal plans. It is easy to become so preoccupied with day-to-day issues that our organizations lose all sense of mission and direction. The planning process accomplishes several valuable things:

- it stimulates forward thinking and clarifies overall direction
- it helps solve major problems confronting an organization or community
- it builds teamwork and expertise
- it improves performance
- it enables us to influence rather than be influenced

When Not To Plan

A full-scale strategic plan is time-consuming and therefore costly. There are times that the costs can outweigh the benefits. These include:

- when a gifted leader is in place and everyone is happy following that person's lead. In one sense, planning can be viewed as an effort to duplicate, what goes on in the mind of a gifted intuitive leader.
- when there are life-threatening problems that must be addressed. Critical problems should be attended to before proceeding with longer-range planning.
- when implementation is unlikely (no money, no commitment, etc.)
- when poor plans are likely to result because the needed information or people are not in place.

How To Plan

The following describes the general steps in any planning or problem-solving process. Details on what each step means are then discussed in the following sections. Specific techniques and tools to carry out activity are provided in this and following chapters.

These steps can be adapted to fit your specific situation. Not all the steps must be done each time. The order of the steps may vary; for instance, a person may bring a

proposal of how another group has successfully solved a problem to a meeting where the problem is first being discussed. In this type of situation, the assessment of need and discussion of objectives and possible action plans might all occur at one meeting. Finally, many different methods can be used to carry out each step. The important thing is to take time to design the most appropriate planning process for your situation.

Problem-Solving Process

Phase 1 Early Awareness

People are acting more or less randomly in response to what is happening in the community. There is confusion about what are causes and what are symptoms of a problem and a sense of powerlessness. Out of this general awareness, some type of group forms to discuss the situation further.

Phase 2 Need Identification

Group members begin to identify specific needs and problems from their own point of view. These concerns are shared with other people, resulting in some agreement on what the problems or needs actually are. Formation of a representative group is very important at this stage. A common vision begins to develop as people work together assessing their community or scanning their environment.

Phase 3 Goals and Objectives

Once needs have been identified and an overall vision or mission agreed upon, goals are set that provide the directions to be taken in planning. Specific objectives describe the strategies to be used in pursuing these directions.

Phase 4 Action Plans

Next, planning for action takes place. This may include seeking the cooperation of new people, considering many alternatives, assessing resources required for the proposed action, publicity to solicit support of the larger community, and final commitment of the necessary people involved to the agreed upon plan of action.

Phase 5 Action or Implementation

The planned activity occurs. This may involve the delegation of authority to one or two people to manage the planned activity. These people are then responsible to monitor the day-to-day activities, to make adjustments as necessary, and to report back to the planning group on progress.

Phase 6 Assessment and Monitoring of Effects

An evaluation of the planned activity occurs and results are reported back to participants both during and after the time of the activity.

Who Should Do The Planning?

In an organization, it is essential to have the support of the chief executive officer before undertaking a wholesale planning effort. In a community, it is wise to have the support of key members of such groups as the city council and chamber of commerce. In either event, it is extremely important that a representative group be created. This honors the American ideals of democratic representation; but practical experience (and research) show that such representation and the support it creates are necessary for successful adoption of plans. Every community has an example of the "perfect plan"

that was defeated because the people affected by it were not involved in its creation.

How Is A Representative Group Formed?

- Ask:
 - Who is affected by the problem?
 - Who might be affected by the plan?
 - Who will be responsible to support or fund the plan?

Seek a mixture of old and young, male and female, wealthy and low-income, college and self-educated members. Seek a mixture of viewpoints. Seek people from different geographical areas and representatives from different agencies. The focus of your planning effort will help you select appropriate representatives. For a health planning effort, you would want health professionals and consumers. For a land use plan, you would want a mixture of development and preservation interests. For a community-wide effort, you will need a cross-section of the entire community.

What Are The Groups' First Steps?

As frustrating as it may seem, the group needs to plan how they are going to plan. That means they need to reach a general agreement about why they have formed a group and what process/timetable they will follow to develop a plan. They should review each phase in the planning process and answer such questions as:

- Who needs to be involved in establishing the overall purpose of the planning effort (vision, mission, needs assessment activities)? How much time might those steps take?
- Who needs to be involved in setting the goals and objectives? Are there resource people who should be included? How long might be needed?
- You may not know who should be included in action planning until the goals and objectives are in place; but you should be able to agree on approximately how long the action planning phase should take.
- Once action planning has occurred, there will be specific timetables for a sequence of activities and the question of how to monitor and evaluate those activities will also have been answered.

Where Do You Fit In The Planning Process?

The communication and teambuilding skills sections are directly relevant to where you might best fit. The self-quiz will help you re-think your possible leadership role and your own personal development goals.

[Return to Planning](#)

[Take The Self-Quiz To Determine Your Problem-Solving Behavior](#)



Community Leader Guide



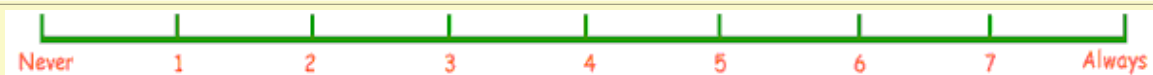
How Do You Solve Problems? Take The Self-Quiz To Determine Your Problem-Solving Behavior

When your group is struggling with a problem, how do you tend to behave? Think about where your strengths and weaknesses are in helping a group through a planning or problem-solving process.

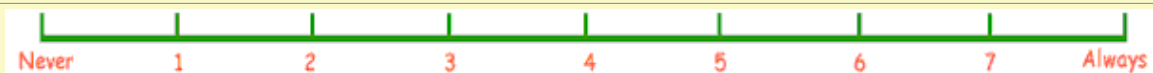
1. When a problem comes up in a meeting, I try to make sure it is thoroughly explored until everyone understands what the problem is.



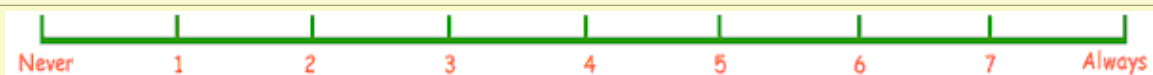
2. I ask why the problem exists and what the causes are



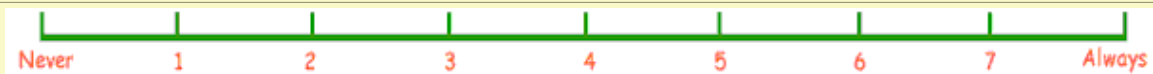
3. I tend to accept the first solution that is proposed by a group member.



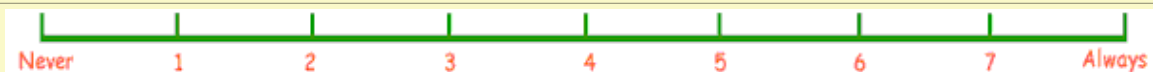
4. When a group decides upon which solution to adopt and implement, I make certain it is clear what the decision is, who should carry it out, and when.



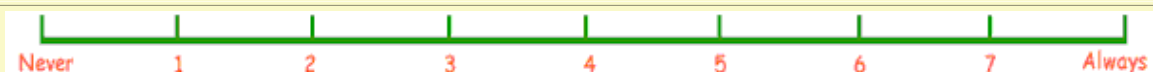
5. I do not take the time to really study or define the problem the group is working on.



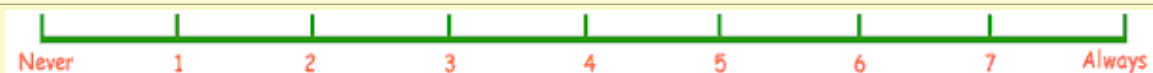
6. I have a tendency to propose answers without really having thought the problem and its causes through carefully.



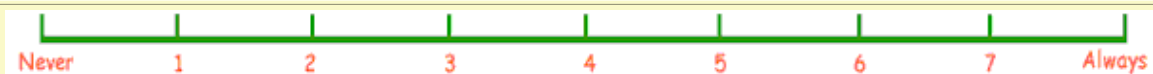
7. I make sure that the group discusses the pros and cons of several different alternative solutions to a problem.



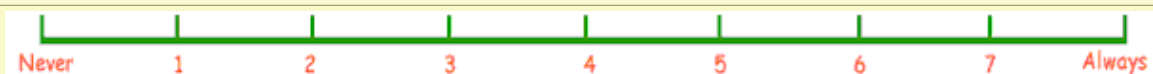
8. I tend to let decisions remain vague, figuring the group will take care of things without a lot of structure.



9. I push for definite follow-ups on how decisions reached at earlier meetings work out in practice.



10. I know if the results of the group's work are worth the effort.



Source: Washington State University Cooperative Extension



Community Leader Guide



Vision and Organizational Mission

What is "Visioning?"

"**Visioning**" is a word used in recent years for what previously was called "Futuring." There has been much research and increased attention on the power of visualization. Visualization is an inner, intuitive sense of union between a person and the content being imagined. An emotional and physiological response involving a person's whole being is generated by the active focusing of one's imagination. People can change their blood pressure, increase sports accuracy, and accomplish what they dream of as a result of active visualization.

By leading a group through a common visualization and having them share, in discussion, the results of that experience it is possible to establish a shared sense of the desired future of their community or organization.

How Do You Achieve a Common Vision?

The basic technique consists of:

1. Designing a guided visualization activity
2. Having people write long-range goals based on their visualization
3. Look for commonalties and establish a total group vision

How Do You Design a Guided Visualization Activity?

It is best to have slow, peaceful music playing in the background. A person reads a statement slowly and calmly to the audience, whose members are sitting in relaxed positions with their eyes closed. Research shows that music paced to the human pulse/heartbeat, a voice that is somewhat monotone, and an atmosphere of relaxation is important to release the power of human visualization.

The other important ingredient is crafting the right words for the people and the situation. The basic storyline of a 3-5 minute statement that results in futuring or visioning involves taking the individual out of their current situation and having them return at a date distant in the future. Upon their return, they are invited to use all their senses in imagining the changes that have occurred.

An Example of a Guided Visualization Activity

"You have just won a lottery and are awarded an all expenses paid trip for yourself and your family to a wonderful, distant location." Research shows that creativity is released when people feel playful and safe, so whatever story you make up that takes individuals out of their current situation should have those ingredients built in.

"You are offered an exciting job in (name of place) that you can't turn down, so you end up staying much longer than you had planned. After ten years, you find yourself missing your home. You miss the (describe with carefully chosen adjectives, the natural features that characterize the environment). You miss your friends and people are asking you to come back and help them in a

changing situation."

Careful crafting of this will evoke the things people value most about their community or organization.

"You fly into (name local airport) and drive/walk through (community or organization). What do you see as you look at (name a section of town or a part of the organization. Repeat the questions until the main parts of the setting for which you are planning have been visited.) What has changed? What do you hear people talking about? How does (name of place) feel?"

Then leave a quiet time for people to digest the information their own brains and hearts are generating during this journey before inviting them to open their eyes and instructing them to write down the key elements of their vision.

What is a mission statement?

An organizational mission statement can develop out of a visioning activity, but is more focused in nature than a vision. In a community development context, the mission statement **may** be for the planning group that is attempting to actualize the vision. In established organizations, the mission statement clarifies what the organization is or is striving to become. Obviously, achieving a community-wide vision may require many different organizations with varying mission statements. An organization itself, however, might choose to develop a vision that is broader and creates a larger context within which it can then refine its mission statement.

The three basic elements of a mission statement are:

- 1) **What:** What customer or client needs the organization exists to fill (not what products or services are offered)
- 2) **Who** are the primary audiences the organization exists to serve
- 3) **How** does the organization carry out its business (its style, activities, and methods)

It is important that the mission statement be clear and understandable and brief enough that most people can remember it.

Why have a mission statement?

The value of a mission statement is that it:

- reminds members of their basic, overriding purpose
- clarifies the arena in which the group operates - can help determine how resources are to be allocated to different demands
- helps distinguish the organization from others

How do you develop a mission statement?

A mission statement can be established by using brainstorming and prioritizing techniques described in the next chapter. The number of people who should be involved and how much time it will take depends on the complexity of the organization.

How do you decide if you need a vision or mission statement?

Whether or not you need the overall direction provided by a broad vision of the desired future or a clarification of organizational purpose depends on the degree to which the planning group has or does not have a clear sense of purpose. If there is confusion about the overall context you are operating in and the kind of future you are working towards, it will make it difficult for people to agree on goals and move forward to the action stage. In such an event, it is likely that a few hours spent on vision or mission will be very productive. If, on the other hand, a group is well organized and knows "what it is about" then they may be able to move directly into

community assessment or goal-setting.

Examples of a Vision Statement and a Mission Statement

These examples show the difference in breadth and focus between the two statements of purpose.

A Community Vision Statement

The City of Z is a quality place for people of all ages to live, work, and learn. Attractive residential areas offer housing affordable to a variety of income groups. A vibrant downtown provides a wide range of products and services that meet the needs of both residents and visitors. Green pathways link different areas of town and pedestrian traffic is encouraged - A unique recreational area provides opportunities both for entertainment and specialized shopping as well as outdoor recreation activities. The City of Z attracts growth and development in a planned manner in the core area and along its southern edge, while preserving the rural atmosphere that characterizes some of its neighborhoods and the unincorporated area to its west.

A County Mission Statement

The mission of X County government is to provide essential and mandated services which will preserve and benefit the health, safety, and welfare of the general public. Services are provided in a professional and courteous manner through the effective and equitable management of available public resources. X County government recognizes that its employees and volunteers are the foundation upon which these services are provided.

[Return to Planning](#)

[Create a Common Future: A Group Exercise](#)



Community Leader Guide



Instructions to Create a Common Future: A Group Exercise

Goal: To enable a group to establish a common vision for their preferred future.

Group size: Unlimited

Physical Setting: A retreat setting is preferable in an attractive room separate from the daily work of

the participants.

Time Required: Approximately an hour for a small group (10-20); 1-1/2 hours for larger group.

Materials

- I. A guided visualization statement suitable to the group and its purpose.
- II. A tape recorder with soft, slow music.
- III. Pencils and paper for each participant.
- IV. Newsprint, marker pens, and masking tape for group reports.

Process

- I. Explain the purpose of the activity and the time it will take (1-2 minutes).
- II. Turn on the music and invite people to sit in a very relaxed position and close their eyes.
- III. Slowly read the guided visualization statement (3-5 minutes).
- IV. Invite people to open their eyes when they feel ready and allow as much time as is needed for every-one to do this. (2 minutes).
- V. Pass out paper and pencils and ask people "Based on what you have heard (earlier in the meeting) and the vision you just experienced, write down four goals or examples of what you would like (name of community or organization) to look like in the year (ten years from now)" (5 minutes).
- VI. Ask people to form into small groups to discuss what they have written on the cards and begin looking for similarities and differences. Group size can vary from 6 to 12. Someone should serve as recorder and reporter for each group. Suggest that everyone take turns and describe one thing on their card and if anyone else in the group has a similar idea, share it at that time. Go around, one by one, until everyone has had a chance to share. Then, if there is time, ask if there are ideas that have not been discussed. These small group instructions should be written on newsprint and the facilitator should observe the groups while they are working to make sure they are functioning. (3 minutes for instructions; 20-30 minutes for groups).
- VII. Each group give a 3-5 minute report. Newsprint summaries are put on wall. (time = # groups times 3-5 minutes).
- VIII. Work with the large group to clarify whether what has been described fits their vision of what they would like to be like in the future. Continue refining the words on the newsprint until there is general consensus about the vision.



Community Leader Guide



Community Assessment

Often in a planning process a group has reached some internal agreement about their overall purpose. They may share a vision or have a written mission statement. They may have identified a problem or a need that they think should be addressed. But before the group feels comfortable finalizing its goals and action plan, it usually needs to check with the larger community it is a part of - If

you are in an organization, the organization itself constitutes a community as well as the target groups it serves.

What is a Community Assessment?

There are different terms used, all of which we include under the general category of community assessment: environmental scan, SWOT (strengths, weaknesses, opportunities, and threats), and stakeholder analysis as well as such terms as key informant interviews, normal group process, and community forum. All of these seek to get at the same basic thing: to learn more about the environment you are planning in and for.

An *environmental scan* seeks to identify the most important factors that will affect your group and the planning process then seeks to address those factors.

SWOT is a method for identifying internal strengths and weaknesses in a group or community and external opportunities or threats that are coming your way.

Stakeholder analysis is based on the assumption that there are certain key people who either are most likely to be impacted by your plans or who hold the resources to determine whether or not your plans will be implemented. A study of stakeholder expectations and concerns can be an important guide to a planning group before they finalize their goals.

Why Conduct Such an Assessment?

Again, unless your group includes a mix of everyone in the community or your purpose is very narrow, you may need to learn more before you develop specific goals. An assessment can tell you:

- what *trends* will impact the issue you want to address
- what *resource people* are available to help you in your planning
- what level of community support *or opposition* you are likely to encounter
- what *preferred actions* people already favor

How Do You Conduct an Assessment?

There are several methods:

- *secondary (already existing) data sources*
- *surveys (phone, mail, or door-to-door)*
- *key informants (including stakeholders or a panel of experts)*
- *group discussions*
- *community forums*

Some of the advantages and disadvantages of these methods are summarized in the following pages. The bibliography lists documents which provide more detailed information about such questions as how to design a survey or select a sample population to survey. This guide is not intended to answer all your questions, but to guide you to a level where you know what kind of additional information you want and, hopefully, where you can find out.

Surveys

Surveys can be done on an entire community but are usually done on a partial sample of the community.

When doing a sample, make sure it is random-that each member of the community had an equal chance of being chosen for the survey.

The most commonly used survey techniques are:

- Person-to-person interviews
- Drop-off and pick-up questionnaires
- Mail questionnaires
- Telephone interviews

Advantages of Surveys

- A small randomly selected sample can provide a great deal of information about the knowledge, opinions, and attitudes of a larger group.
- A survey can be used as a way for people to feel involved in a planning or decision-making process.

Disadvantages of Surveys

- If the sample is not random, you will get biased results.
- You must be very careful in wording questions to avoid biased questions or ones that offend respondents.
- Time and care are required to select a sample, construct the questions, and interpret the results.

Key Informant

This method gathers information from persons who are in a position to know the community well, such as longtime residents, public officials, business managers, or respected leaders. It is important to draw key informants from all segments of the community.

Advantages of Key Informant

- Provides an opportunity to establish rapport and trust with important community leaders.
- You can get in-depth information on a variety of issues.
- You can return to informants to clarify issues (or resources) as needed.

Disadvantages of Key Informant

- Selecting some people to be informants and not others may create resentment on the part of those not selected.
- Information may be difficult to quantify and summarize accurately.

- Rather than acting as a representative of a segment of the community, a key informant may give primarily his/her opinions and biases.

Nominal Group Process

Get together a group representing various groups in the community to discuss a problem or issue. The methods of conducting the group meeting may vary, but one approach is for members to write their individual ideas on paper, combine the written ideas into an "agenda" which everyone discusses together, and then establish priorities by silent balloting.

Advantages of Nominal Group Process

- May stimulate creative thinking and cross-fertilization of ideas.
- Can generate many ideas in a short period of time.
- A quick way of getting opinions from people with diverse backgrounds.

Disadvantages of Nominal Group Process

- Must have a skilled and flexible leader who can encourage people to express themselves and yet control those who might try to dominate the meeting.
- Must be limited to small groups (10-20 members) or large groups which then break into smaller groups.
- May not be appropriate when trying to decide between already identified alternatives or when coordinating activities to accomplish goals.

Community Forum

One or more public meetings to which residents are invited to express opinions and concerns on a particular issue.

Advantages of Community Forum

- Provides an opportunity for people from diverse backgrounds to express ideas.
- Can provide a quick picture of important community concerns
- Can be effective for publicizing efforts in an area.
- If done correctly, citizens will feel they have been involved in the planning process.

Disadvantages of Community Forum

- Requires skilled leadership to run the meeting.
- If not well advertised, will not get a cross section from the community.
- May cause participants to become frustrated if objectives of meeting are not made clear.

Community Asset Building/Mapping

A new approach to conducting community assessments is asset mapping or capacity building. Rather than focusing on negative problems in your community, an alternative approach is to focus on what assets your community has to offer and the capacities and skills a community can use to improve their situation. Asset mapping examines a community's well-being based on the resources provided by local institutions, such as schools or business, community associations, such as churches, parks, neighborhood clubs, or cultural groups, and the assets of individual residents in the community, such as senior centers, youth groups, artists, etc. Within these three major categories lie a wealth of assets that can be mapped for any community. Once a community identifies their assets, they can begin to rebuild the relationships among the institutions and associations that will be best capable of addressing problems. In summary, asset

mapping is based upon the strengths and capacities of the community rather than its weaknesses or deficiencies.

For a detailed description of how to conduct asset mapping in your community refer to:

Building Communities from the Inside Out: A Path Toward Finding and Mobilizing A Community's Assets. 1994. John P. Kretzmann and John L. McKnight. ACTA Publications, Chicago, IL

To order a copy of this publication please contact:

ACTA Publications

4848 North Clark Street

Chicago, IL 606040

Phone: 800.397.2282

FAX: 800.393.0079

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[Goals and Objectives](#)



Community Leader Guide



Goals and Objectives

What are Goals and Objectives?

Goal: A broad statement of what you want to achieve in a medium time frame (3-5 years) A goal statement is future oriented and somewhat general, but it needs

a verb to clarify the action and the outcome must be specific enough that you can tell if you have achieved your goal.

Objective: A specific statement of how you will reach your goal, in a short time frame (one year).

Most goals have several different objectives. The objective describes one area of activity that helps achieve the larger goal. It is measurable and specific.

What Do Goals and Objectives Provide?

- A means of communicating the group's purposes.
- An orientation for new members.
- A basis from which to make organizational changes.
- A basis for long-range planning and evaluation.

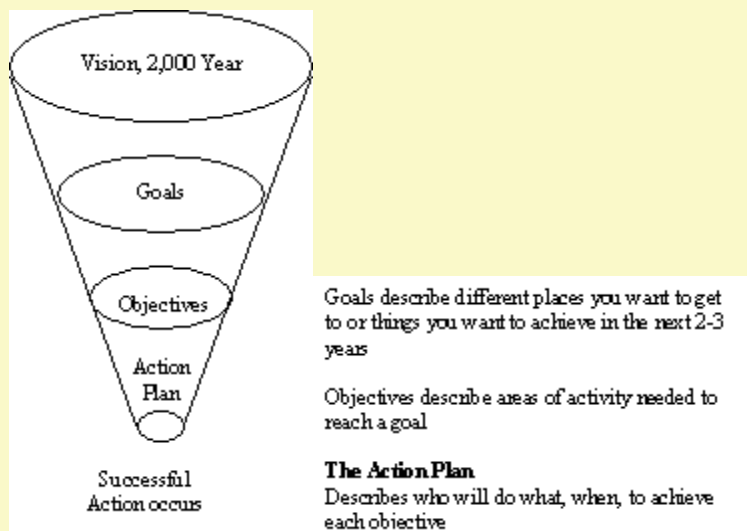
It is not uncommon for a planning group to consider one action area as one objective to achieve a larger goal, while the volunteers who are working in that action area consider it a goal. It is not so important to worry about the terminology, as it is to understand the function that goal statements and written objectives serve.

Why Have Written Goals and Objectives?

The basic concept to understand is that of "tunneling". The vision statement or mission statement represents the top of the funnel, where it is very wide. Such a statement encompasses many different activities and people within it. It gives people an overall purpose that they share in common; but it does not explain why some people should work on one thing and other one another. Goals and objectives are at the mid-point on the funnel. They help separate out the targets you are aiming at. Beneath each objective, lower in the funnel, come the very specific steps to be taken by specific individuals. Without agreement on this funnel, successful action does not come out at the bottom.

Without written goals and objectives, most groups become confused over time. It is not uncommon for a means to become an end. For example, a group organizes around the mission of serving the handicapped. One of the three goal areas they select is to operate a business to employ the handicapped. In a few years, the activities of the business become an end in themselves and people begin thinking that making the largest profit or expanding the business is the goal, rather than serving the handicapped. The handicapped employees are gradually replaced and the purpose of the organization changes.

When confusion arises during the action stage as many people work on many projects, it is important to have written goals and objectives to look at to keep the "ends" and the "means" in focus.



How Do You Develop Goals and Objectives?

Most groups are clarifying their goals all the time. A basic method for helping a group establish goals and a specific technique that is recommended one follow before writing objectives are explained on the following pages.

Examples of goal and objective statements and forms for recording a group's goals and objectives can be found at the end of this section.

Basic Goal-Setting Method

1. Select a facilitator.
2. Set the context as shown #1 in the Force-Field Analysis below.
3. Form the group(s) that will use the technique. The ideal group is five to nine persons, but can be up to 12 people.
4. Have the members of the group seat themselves around a table in a room that has a nearby wall where 5x7 index cards may be taped and read clearly from where the members sit.
5. Focus on a single question, problem or issue.
6. Have the individuals in the group silently brainstorm as many ideas as possible in response to the question, and record them on their personal worksheets.
7. Have individuals pick out the three to five best items from their personal worksheets and transcribe them onto separate index cards. Make sure people write legibly enough and large enough so that their cards can be read when posted on a nearby wall. (one idea per card, with "BIG LETTERS")
8. Have group members attach a tape roll to the back of each of their cards.
9. Collect the cards (shuffling them if anonymity is important) and start taping them one at a time to a nearby wall, clustering cards with similar themes together. As an alternative, the group may wish to tape all cards to the wall at once, and as a group rearrange the cards into thematic clusters. ("Is this item connected in any way to other cards you see up here?")
10. The label for each cluster of cards should be selected by the group. Once the group agrees to a category's name, it should be written on a separate card and placed at the top of the items in the category. These label cards should be differentiated in some way, perhaps a different color card or ink, or by drawing a box around the category name. ('What do all the cards in this cluster have in common? What is this about?')
11. Once all items are on the board and included in a category, the items can be rearranged and the categories tinkered with until the group thinks the results make the most sense. Categories might be arranged in logical, priority, or

temporal order. New items may be added and old one deleted as necessary. Subcategories should be added as needed.

12. When the session is over, the information should be typed in outline or spreadsheet form, and distributed to the group as a draft set of goals.
13. Agree on further work. Often you will find that many of the ideas that were brainstormed are either objectives or action steps. The next page describes a method for generating objectives once a goal has been established. If there is time left in the meeting, the group can work as a large group on one goal at a time. Or small groups can divide up the goal statements and draft a set of alternative objectives for achieving the goal. If there is not time, the group needs to agree how the next step in the planning process will occur. They may want to involve other people, interview specialists, or do research before the next meeting. They may agree to delegate goal areas to committees.

A Method To Help Identify Objectives:

Force-Field Analysis

Force-field analysis is a method that allows people to identify conditions that might help or prevent them from reaching a goal. Objectives can be written easily when they seek to minimize the barriers and strengthen the positive areas.

To conduct a force-field analysis, use the following steps:

1. Clearly state the goal or desired situation.
2. Identify the situation "as it is".
3. Brainstorm the forces, which will *help* you reach your goal.
4. Brainstorm the forces, which might *prevent* you from changing the present situation.
5. Prioritize the negative forces in order of the most significant obstacles which can be dealt with.
6. Brainstorm possible solutions to the prioritized list of obstacles.
7. Brainstorm ways in which the positive forces can be preserved or taken advantage of.
8. Write objectives and action plans based on these solutions.

An Alternative Method Is To:

1. List the different ideas people identified as ways to reach a goal.
2. Brainstorm the pros and cons for each idea and have someone write them down.
3. Facilitate a group discussion regarding which alternative approaches look most promising.
4. If there is no consensus, (see page 81), give each person three votes to pick the objectives they think are most feasible. Using sticky dots or markers, have people record their votes on paper.
5. Seek group agreement as to which objectives will be pursued as ways to reach the goal.

Writing Objectives

I. Mission

To preserve sea gulls and promote compassionate public interest in their pursuit for self-realization.

Goals:

Supply crash helmets to fledging seagulls in rocky environs.

- a. Identify by June 1st, three potentially rocky areas frequented by seagulls.
- b. Design a seagull crash helmet by June 1st.
- c. Identify four volunteer plastic craftspeople by June 1st.
- d. Have thirty completed crash helmets by September 15th.
- e. Have thirty seagulls outfitted with helmets by November 1st.

II. Organize public tours to seagull habits.

III. Plan a "take-a-seagull-home-to-lunch" week.

	Organize public tours to seagull habits.	Plan a "take-a-seagull-home-to-lunch" week
(a) Identify by June 1st, three potentially rocky areas frequented by seagulls.	(a)	(a)
(b) Design a seagull crash helmet by June 1st.	(b)	(b)
(c) Identify four volunteer plastic craftspeople by June 1st.	(c)	(c)

(d) Have thirty completed crash helmets by September 15th.	(d)	(d)
(e) Have thirty seagulls outfitted with helmets by November 1st.	(e)	(e)

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[Action Plans](#)



Community Leader Guide



Action Plans

Why Write an Action Plan?

Action plans are extremely important. They provide the bridge from the general ideas your group has about what they want to see happen to the actual implementation. The most common place where group planning falls down is at this stage. Community groups often assume that individuals know what steps to take and no one is assigned a coordinating role. As a result, work is not carried out. People become frustrated. If action does not occur on a regular schedule, the group begins to characterize itself as "all we do is talk about the problem but nothing gets done." Have you been in a group that failed to implement its plan?

What Is In an Action Plan?

The action plan records who is going to do what, when. It also identifies any resources that people will need to carry out that step. For every set of actions, there needs to be an overall coordinator or contact point who is different from the people carrying out the action step. Those are the people who monitor action and make sure individuals are receiving the necessary support.

How Do We Write an Action Plan?

From the standpoint of group maintenance, this is the stage to double-check that everyone is in agreement. As you begin filling out the forms (next section), you want to make sure that the group has time for the following conversations:

- Do we need to choose one objective or another? Can it be both?
- We thought we were in agreement to this point, but now there seems to be disagreement and how to implement. Let's talk this out. (this is where you may discover you had a different interpretation on goals or objectives)
- Are we moving too fast? I sense some people are not quite ready to commit to this plan. What are your concerns?
- Let's check for group consensus. Is there anything happening that you cannot live with?

In terms of the task, you are answering the questions about:

- What exactly will happen to achieve this objective?
- Who will be responsible to carry out the activity?
- Whose support do we need?

There are different ways to record this information. You can choose the format you think will work best for your group. The important thing is to write it down and give everyone a copy. This is the stage where, if a plan is not written, it will affect people's ability to get the job done.

[Click here to print two pages showing three different record keeping formats.](#)



Community Leader Guide



Action Plans

Who Can Help Us Develop an Action

Plan?

The two remaining chapters on Volunteers and Fund raising will be relevant to your action plan. The section on Resources in the Appendix lists specific sources of help for the action planning stage.

How should we record our action plan?

If the tasks are fairly simple and well-understood, either of the two formats on the following page might be suitable.

Goal: _____

Objective: _____

Major Action # _____

Person Responsible: _____

Timeline: _____

Resources Needed: _____

Major Action # _____

Person Responsible: _____

Timeline: _____

Resources Needed: _____

Project Plan		
Goal: _____		
Objective: _____		
Tasks	Person Responsible	Due Date

The format below has been successfully used by many groups in carrying out complex projects involving several different actors.

Project work plan

Project: Purpose:	Coordinator: Committee:
-------------------	-------------------------

Task	Who will do it?	Timeline:			
		Start	End	Cost	Resources
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

Completion Date: Results:	Notes:
Follow up needed:	

SOPPADA

The last step in your action plan will be to be clear about what kind of support you need from other groups. Communicating effectively with other groups is key in helping you achieve your goals. You may want volunteers, money, or their vote.

One simple way to communicate with other groups is to have a one-page summary about the situation. An easy way to remember what could go into the summary is **SOPPADA**:

- **S=Situation:** what is the overall situation that gave rise to the project. Describe the problem or need.
- **O=Objective.** What is your group's objective... what is it you want to achieve?
- **P=Plan:** Give a little more detail about the plan or proposal of how you will achieve that objective.
- **P=Price:** If you know some costs, list them... especially if you are seeking a financial donation from the group you are contacting!
- **A=Advantages:** What are the benefits to the particular group you are contacting of supporting this proposal? (you might change this for each group... think of it from their perspective)
- **D=Disadvantages:** If you don't tell them the possible disadvantages, they will think them up by themselves. It is better to get any possible problems on the table from the beginning.
- **A=Action:** Exactly what action do you want from the group? Do you want money? Manpower? Signatures on a petition? The more specific you are about what you are asking for, the more likely it is that you will get it!

Don't forget to include a SOPPADA summary in your action plan. This can be used to recruit and orient volunteers as well as funding sources.

[Monitoring and Evaluation](#)



Community Leader Guide



Monitoring and Evaluation

Why Evaluate?

Evaluation is the least practiced part of planning in most communities. However, if you are receiving money from any outside source you will be expected to provide some type of summary report. Evaluation is the process not of summarizing what you

accomplished, but comparing it to what you set out to accomplish. It asks the question:

Did we do what we set out to do?

A complete evaluation also asks: What was the impact of our activity?

It is not unusual that well-conceived actions result in an unanticipated results. Even if everyone carries out the actions that were agreed upon, evaluation may show that those actions did not achieve the objective or goal. If you do not evaluate, a group can continue actions long after the goal has been achieved or continue action which are not achieving the goal at all.

How Do We Evaluate?

You must plan for how and what you are going to evaluate before activities begin. The coordinator who is monitoring activities to ensure that they are in place is the person most suitable for keeping records needed for evaluation, unless you have money to pay an outside evaluator. Some large projects funded by public monies require an outside, neutral evaluator.

There are two basic philosophies of evaluation. One is that the evaluator should be separate from the action and as neutral as possible; he or she collects the information, analyzes it, draws independent conclusions, and presents recommendations to the group that has carried out the plan. The other philosophy is that of participatory evaluation and believes that those who carry out the plan are the best qualified to interpret the information and draw conclusions. In either event, recommendations are seldom valued unless the group who must adopt them is involved in refining them.

The planning group should develop answers to the following questions:

Purpose:	1. What do we want to know?
Levels:	2. What level of outcome do we want?
Evidence:	3. How can we measure the outcome?
Data Gathering:	4. Who will collect the information? How will they collect it? When?
Analysis:	5. What does the information tell us? Who will interpret the information that has been collected and draw conclusions and make any recommendations?
Reporting:	6. Who is the information reported to? What format does it need to be in?
Resources:	7. How much time and money will be involved?

The evaluation should make sense to the group that is coordinating the action. It should

help you know whether you reached your goal or not. It should help you justify what next steps are needed.

What Kinds of Things Should Be Evaluated?

Only your group can answer that question. This page lists the different types of events which can be monitored and the kinds of evidence that will measure them, beginning at the lowest level (how much time was spent by how many people; how much money was spent) to the highest level (what was the end result of the activity?; how many people were helped; What changes occurred?) Inputs are the means to an end. End results are the goals you are trying to achieve.

Examples of Evaluation Indicator Level	
<u>Level</u>	<u>Examples of Possible Indicators</u>
7. End results	Increase or decrease in numbers of businesses; population increase; improvement in public services or facilities; reduced drop out rate.
6. Change in behavior	New capacity by local citizens to implement development strategies; changes in how a group makes decisions or who they cooperate with.
5. Increase in skills	Workshop evaluations show that leaders have learned something and knowledge new. Behavior or opinions demonstrates new knowledge was acquired.
4. Reaction/Attitudes	Participants report feelings of renewed commitment, enthusiasm, confidence (or anger, hopelessness). People honored their contract to attend meetings and carry out activities (or did not)
3. People involvement	Change in numbers of people participating in activities, client contact, etc.
2. Activities	Number of workshops delivered, committee meetings held, new partnerships formed
1. Inputs	Amount of new money raised; in-kind contributions; hours of expertise or labor committed to project.
<i>Source: Claude Bennett, "Analyzing Impacts of Extension Programs" USDA, 1979</i>	

PLANNING REVIEW	I am good at	I am fair at	I need help with
1. Understanding the basic steps in a planning or problem-solving process			
2. Explaining the advantages and disadvantages of planning			
3. Helping a group establish a future vision or mission statement.			
4. Helping design a community assessment tool			
5. Helping a group brainstorm			
6. Helping a group analyze the pros and cons of alternative approaches			
7. Helping a group prioritize			
8. Help a group prepare "visual plans" (flow chart, management matrix)			
9 Managing complex information (history, evaluations, summary reports)			
10. Helping a group recognize training it needs to accomplish its goals.			
11. Acquiring resources (people, money, information equipment, etc.)			



Community Leader Guide



Introduction: Meeting Management

Because almost all group work takes place in meetings, meeting management deserves special attention. Teams learn to work together by participating in meetings, plans are generated, mutual understanding is developed, and decisions regarding actions are made in meetings.

	Things I Need to Know About Meeting Management	Where Do I Find It?
1. Alternatives to Meetings	1. Do I really need to call a meeting?	1
2. Decision Making Methods	2. Are there ways, other than voting, to make decisions?	2
3. Planning Meetings	3. What is parliamentary procedure and when do you use it?	2
4. Preparing an Agenda	4. What do I need to think about and plan for prior to the meeting?	3
5. Leadership Roles	5. What goes into the design of an agenda?	4
6. More About Facilitation and Facilitators	6. Are there specific leadership roles that will make the meeting more productive?	5
7. Dealing with Difficult Members of Meeting Situations	7. What is a facilitator and do I need one?	5 and 6
8. Meeting Evaluation Tools	8. How do I handle disruptive group members and/or situations?	7
9. Summary	9. Is there a way that I can evaluate my meeting leadership effectiveness?	8
	10. How can I help the group evaluate their effectiveness?	8
	11. What is the role of a process observer and do I need one?	8

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[Alternatives to Meetings](#)

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Alternatives to Meetings

Don't hold a meeting for a meeting's sake. Other methods of collecting needed information are described in the table below:

Meeting Purpose	Possible Alternatives
a. Feedback	<ul style="list-style-type: none"> • Phone calls • Questionnaire • Informal conversation over lunch • Quick meeting in the hall
b. Briefing	<ul style="list-style-type: none"> • Letter/memo/e-mail • Phone conference calls • Informal conversation over lunch
c. Educational/training	<ul style="list-style-type: none"> • Classes/workshops outside organization • Reading lists
d. Problem Identification	<ul style="list-style-type: none"> • Questionnaire • Phone conference calls • Personal conversations • Subcommittee
e. Solution – Generating Ideas and Options	<ul style="list-style-type: none"> • Subcommittee • Individual work
f. Evaluation and Decision Making	<ul style="list-style-type: none"> • Individual work • Subcommittee
g. Implementation	<ul style="list-style-type: none"> • Subcommittee or Task Force • Individual work

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[Decision Making Methods](#)



Community Leader Guide



Decision Making Methods

Nothing is more frustrating than a meeting that does not result in any decisions or make any progress toward accomplishing group objectives. The table below outlines several different approaches to decision making and describes the advantages and disadvantages of each

Method of Decision Making	Disadvantages	Advantages
1. Decision by authority without discussion	One person is not a good resource <i>for every decision</i> ; advantages of group interaction are lost; no commitment to implementing the decision is developed among the other group members; resentment and disagreement may result in sabotage and deterioration of group effectiveness; resources of other members are not used.	Applies more to administrative needs; useful for simple, routine decisions; should be used when very little time is available to make the decision, when group members expect the designated leader to make the decision, and when group members lack the skills and information to make the decision any other way.
2. Decision by authority after discussion	Does not develop commitment to implement the decision; does not resolve the controversies and conflicts among group members; tends to create situations in which group members either compete to impress the designated leader or tell the leader what they think he or she wants to hear.	Uses the resources of the group members more than the previous method; gains some of the benefits of group discussion.
3. Expert member	It is difficult to determine who the expert is; no commitment to implement the decision is built; advantages of group interactions are lost; resentment and disagreement may result in sabotage and deterioration of group effectiveness; resources of other members are not used.	Useful when the expertise of one person is so far superior to that of all other group members that little is to be gained by discussion; should be used when the need for membership action in implementing the decision is slight.
4. Average of members' opinions	There is not enough interaction among group members <u>for them to gain from each other's resources and from the benefits of group discussion</u> ; no commitment to implement the decision is built; unresolved conflict and controversy may damage group effectiveness in	Useful when it is difficult to get group members together to talk, when the decision is so urgent that there is not time for group discussion, when member commitment is not necessary for implementing the decision, and when group members lack the skills and information to make

	the future.	the decision any other way; applicable to simple routine decisions.
5. Majority control	Usually leaves alienated minority that damages future group effectiveness; relevant resources of many group members may be lost; full commitment to implement the decision is absent; full benefit of group interaction is not obtained.	Can be used when sufficient time is lacking for decision by consensus or when the decision is not so important that consensus needs to be used, and when complete member commitment is not necessary for implementing the decision; closes discussion on issues that are not highly important for the group.
6. Minority control	Does not utilize the resources of many group members; does not establish widespread commitment to implement the decision; unresolved conflict and controversy may damage future group effectiveness; not much benefit from group interaction.	Can be used when everyone cannot meet to make a decision, when the group is under such time pressure that it must delegate responsibility to a committee, when only a few members have any relevant resources, and when broad member commitment is not needed to implement the decision; useful for simple, routine decisions.
7. Consensus	Takes a great deal of time and psychological energy and a high level of member skill; time pressure must be minimal, and there must be no emergency in progress.	Produces an innovative, creative, and high-quality decision; elicits commitment by all members to implement the decision; uses the resources of all members; the future decision-making ability of the group is enhanced; useful in making serious, important, and complex decisions to which all members are to be committed.

Many of the decision-making methods described above do not require the convening of a meeting. The two most common methods used during meetings are 1) majority rule using Parliamentary Procedure and 2) consensus.

Parliamentary Procedure is well established as a traditional way to formalize decisions. Its advantage is it takes relatively little time and there is a clear, stable, fair set of steps that lead the group to closure on a decision. Its disadvantage is that people not experienced with the rules are less likely to participate. In some situations, the reliance on voting and rule by the majority can be a drawback if support is needed from all members in the group or if successful action can be blocked by a minority that does not agree with the decision. A brief explanation of Parliamentary Procedure is given on the next page.



Community Leader Guide

Parliamentary Procedure at a Glance

• = cannot be amended

To Do This	You Say This	May You Interrupt Speaker	Must You Be Seconded	Is the Motion Debatable	What Vote Is Required
Introduce business	"I move that."	no	yes	yes	Majority
Amend a motion	"I move to amend this motion by."	no	yes	yes	Majority
○ Request information	"Point of information"	yes	no	no	No vote
○ Suspend further discussion/ action	"I move we table this motion"	no	yes	no	Majority
End debate and proceed to a vote	"I move the previous question"	no	yes	no	2/3 majority
Postpone discussion	"I move we postpone this matter until."	no	yes	yes	Majority
Have a committee work on it	"I move we refer this matter to a committee"	no	yes	yes	Majority
○ Verify a voice vote by show of hands	"I call for a division of the house"	no	no	no	No vote
○ Object to considering some matter	"I object to consideration of this matter"	yes	no	no	2/3 majority
○ Resume consideration of a tabled item	"I move to take from the table."	no	yes	no	Majority
○ Reconsider a previously decided item	"I move we reconsider action on."	yes	yes	yes	Majority
○ Consider something in unscheduled order	"I move we suspend the rules/agenda and."	no	yes	no	2/3 majority

○ Object to procedure used or personal affront	"Point of order"	yes	no	no	No vote Chair rules
○ Vote on chairs ruling	"I appeal the chair's decision."	yes	yes	yes	Majority
○ Complain about noise, room temperature, etc.	"Point of personal privilege"	yes	no	no	No vote
○ Recess the meeting	"I move that we recess the meeting until."	no	yes	no	Majority
○ Adjourn the meeting	"I move that we adjourn"	no	yes	no	Majority

Consensus Decision Making

Consensus decisions are based on all members supporting the decision or action. Consensus is not a compromise because members work to seek mutual understanding and agreement on the decision. Consensus building incorporates all members' opinions and values into the decision. This approach is more difficult because it utilizes the tension created by a diversity of opinions to reach a creative agreement. Consensus building can be quite time consuming. The benefit of building consensus on complex, high stake decisions is that it fosters group empowerment, builds group cohesion, and improves interpersonal relationships and accountability.

Reaching consensus requires time and hard work. Whereas people generally understand majority rule, consensus is not so easily understood. There are many misconceptions such as it takes too long, or that everyone must agree unanimously on a decision. Consensus is reached when members mutually agree to a decision and feel their concerns regarding the issue have been adequately addressed; it is not unanimity. Consensus means that:

- All participants contribute.
- Everyone's opinions are used and encouraged.
- Differences are viewed as helpful rather than hindering.
- Everyone can paraphrase the issue.
- Everyone has a chance to express feelings about the issue.
- All members share in the final decision.
- Enough time is taken so that all voices are heard and understood before any effort to finalize a decision is made.
- All members agree to support the final decision and accept responsibility for its implementation.

When working to build consensus, it can be very helpful to have 4 or 5 **levels of consensus**. The group may prefer to work with fewer levels for simplicity but the following 5 levels are given as an example:

1. I can easily accept the decision or action.
2. I can accept the decision or action but it may not be my preference.
3. I can accept the decision or action with minor changes.
4. I accept the will of the group, but I don't necessarily agree with the decision or action.

5. I cannot accept the decision or action.

If a member expresses a level 5 concern, the group does not have consensus. If everyone has a level 4 or higher, consensus is reached. Using levels of consensus helps groups to be more time efficient while still addressing the concerns while building mutual agreement. The decision to use consensus levels should be made prior to any discussion of the issues at hand.

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[Planning Meetings](#)



Community Leader Guide



Planning Meetings

If a meeting is needed, it is worth planning for. A common trait of successful group sessions is methodical, careful, planning. What elements of planning assure top results? To develop an effective meeting plan the items described below must be given careful consideration.

- Define the purpose of the meeting.
- Identify the issues or topics that must be considered.
- Define the outcomes desired.
- Identify the participants.
- Identify the processes that may be used to achieve the purpose and reach the desired outcomes.
- Consider location, date, and time for the meeting.
- Consider the characteristics of the meeting's physical environment and equipment or other materials that will facilitate the group's productivity.

First the purpose for the meeting must be clearly established. Is the meeting being held to simply share information? If so, perhaps other methods may be more effective. Does the group need to make decisions and take action? Is the meeting being held to resolve conflicts or engage in team building? Writing the purpose down and being clear as to why the meeting is being held will serve as an important guide and checkpoint for all other planning decisions.

Next, identify the issues and/or topics that need to be addressed during the course of the meeting. Some items may only involve the exchange of information such as the submission of a report. Others may require group decisions and the development of an action plan. At this point it is helpful to review past meeting minutes and solicit the input of others to ensure that important items for consideration are not overlooked. For each item, determine the amount of time that can reasonably be allotted for its consideration and who will be responsible for leading the group in the item's consideration.

Next, for each item determine the desirable outcome of the topic's consideration. This is not to say that the plan should attempt to predetermine the group's action or decision. For example, the desired outcome may be identified as information sharing, general discussion, continued learning, delineation of creative options, goal setting, problem solving, decision making, and/or action planning.

Now, you need to consider the people who will be in attendance. How many people will be involved? More than 15 people may limit discussion and impede group action. If more than 15 people need to be involved, you should begin to consider more than one meeting or ways to subdivide into subcommittees or other smaller groups. Will everyone in attendance have the necessary background or will a review and update be required? How interested or disinterested will group members be in the topics? Can you anticipate difficult people or situations arising from the introduction of the items? Continue to ask yourself questions until you are comfortable with your understanding of group members and the dynamics that may emerge.

Considering the topics, desired outcomes, and the people involved, you now need to consider the processes that can be employed to use people's time most effectively and efficiently. Should you bring in an expert or assign a small committee to gather and present information to the group? Do you need small group brainstorming followed by priority setting and decision making? Can the required outcome be simply reached by using parliamentary procedures? Is the issue of sufficient importance that group consensus is required? Do you need a neutral facilitator to guide the group's discussions and resolution? Is the distribution of written reports followed by brief summaries better than more comprehensive oral reports? Thinking through the topic and determining the process to be used will help keep your meeting on time, running smoothly and increase the likelihood of success.

Location, date, and time are important considerations. Meetings that require concentrated attention and/or creative thinking may be better held away from the routine work environment. An off-site location might also be important if there are any territorial or "home court" advantages that must be considered. If small group work is desirable, the availability of break out rooms needs to be considered. In selecting the date you need to consider possible conflicts and the availability of those who need to be in attendance. People like to schedule meetings well in advance to avoid the need for last minute schedule changes. The time of day will greatly influence the amount of energy people bring to the meeting and the need for refreshments. Typically low energy times such as immediately after lunch or evening may require more frequent breaks or an increased number of energy creating group activities.

The physical environment of the meeting location can have a major effect on the success of the meeting. Below are some of the factors that should be considered:

- **Distractions** - Interruptions, phone calls, message deliveries, traffic noise, and other forms of distraction can break the rhythm of the meeting, slow it down or derail it entirely. Arrange the meeting place and set up the ground rules to avoid as many distractions as possible.
- **Comfort** - Overly comfortable chairs can create ambivalence while uncomfortable seating can create irritability. The temperature should be set to a comfortable level and monitored throughout the meeting. Check window location and be aware of glare. Lighting location and intensity should be sufficient for easy reading and note taking but adjustable to facilitate the use of audiovisual equipment.
- **Equipment** - Be sure that the meeting location can accommodate and support any equipment that you plan to use. Check on the size and condition of projection screens and the working condition of public address systems. Check the number and location of electrical outlets and determine if extension cords will be needed. Also have easel(s), paper, masking tape, and markers on hand for group exercises and recording.
- **Convenience** - Be sure group members know where they can park and how they can easily access the meeting location and restroom facilities.
- **Room setup** - Arrange seating to allow eye contact between as many people as possible. Tables or desktops should be provided if members will be required to complete writing assignments or take notes. Writing materials should also be provided. Members should be able to see audiovisual presentations with a minimum of disruption and rearrangement.

A meeting planning and facility setup checklist are given on the next page to help guide your preparation efforts.

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[Meeting Preparation Checklist](#)

To Do Prior to Meeting	By Whom?	By When?

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[Meeting Setup Checklist](#)



Community Leader Guide

Meeting Setup Checklist

Facilities:

- _____ Room reserved
- _____ Table and chairs arranged
- _____ Attractive appearance

Participants:

- _____ Invited to attend
- _____ Informed of time and place and how to access
- _____ Speakers or guests contacted and confirmed

Equipment/Materials:

- _____ Audiovisual equipment reserved tested and in place
- _____ Easel and paper
- _____ Copies of handouts
- _____ Copies of agenda
- _____ Masking tape
- _____ Name tags or tents
- _____ Markers, pens, writing pads
- _____ Other: _____

Housekeeping:

- _____ Refreshments
- _____ Lights (location, switches, dimmers)
- _____ P A system (location, controls, microphones)
- _____ Restrooms (locations, keys)
- _____ Trash containers
- _____ Temperature (controls)



Community Leader Guide



Preparing an Agenda

A meeting agenda serves as a road map to help us navigate our way through the meeting process. Without an agenda, the meeting can easily drift off course and prevent us from accomplishing the meeting purpose. Agendas can help us in three ways:

1. The thought required to complete the pre-meeting planning and build the agenda helps clarify the purpose and provides insight into process strategies that will increase the prospects for meeting success.
2. Distribution of the agenda prior to the meeting alerts members as to the purpose, the items under consideration, and the homework that might be required. It also allows members to provide suggestions for modifications deletions, and/or additions.
3. During the meeting, the agenda provides focus for group process and a record of progress and achievement.

Agendas can take many forms depending on the nature of the group and the degree of formality that is attached to the group and the meeting. Certain artistic license must be allowed to make the agenda attractive as well as functional. Regardless of the form, however, every agenda should contain the fundamental elements listed below:

- Group identification or meeting name
- Time, date and location. Be sure to highlight any changes from the routine if relevant.
- Purpose of the meeting.
- List of anticipated participants.
- Items to be discussed including:
 - ✓ Brief description including attachments with necessary background and any other briefing material.
 - ✓ Goal, desired outcome, or action required.
 - ✓ Allotted time.
 - ✓ Person responsible for leading the discussion.

Good agenda planning also involves attention to the order and sequence of items to be considered. Below are some helpful hints that will establish a positive atmosphere and improve the flow of the discussion:

- Circulate the draft agenda prior to the meeting to get member suggestions for changes, additions or deletions.
- Distribute the final agenda ahead of the meeting so members have time to prepare.
- Do not overload the agenda. Be certain that only those priority items that need face to face consideration are included. Meetings should generally last no longer than two hours. The beginning and ending times should be enforced.
- Allow time at the beginning of the meeting for the review of ground rules and the introduction of members and guests.
- Items that involve the participation of guests should be scheduled early in the agenda. This will permit your visitors to leave when they are finished and allow you to conduct the remainder of your business in private.
- Place the most compelling items near the top of the agenda. Members will have more energy and be able to give their full effort to the item. This also encourages people to arrive on time.
- Group related items together. This avoids having to repeat background information and reduces confusion.
- Allow time at the end of the agenda to discuss future agenda items and meeting details.

Remember, a well planned agenda shows respect for individual needs and recognition that meetings are only one part of our lives. Respecting the value of each member's time and contribution will pay off in increased member commitment.

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[Leadership Roles](#)



Community Leader Guide



Leadership Roles

For a group to be successful, they must have a variety of leadership roles performed. In traditional groups, those roles consist of president, vice-president, secretary, and treasurer. The advantage of traditional officer positions is that people are generally familiar with the roles. Having them in place for some period of time provides continuity for an ongoing group effort. A disadvantage can be

burnout from one individual carrying a disproportionate share of the responsibility or a false sense by the larger group that only the officers have power to make things happen.

Some groups have experimented with shared or rotating leadership roles. They have identified the tasks needed to run a successful meeting and assigned individuals to fulfill these roles. Below is an example of the roles identified:

- **Facilitator:** Sets the agenda, makes certain everyone is informed about the meeting and leads the discussion.
- **Host:** Arranges the location of the meeting, provides refreshments, greets and orients newcomers and monitors the location environment.
- **Recorder:** Records the essence of the discussion and all decisions on large sheets of paper so all can both "see" and "hear" what is said. Summarizes the record and distributes minutes after the meeting adjourns.
- **Timekeeper:** Reminds the group if they stray from the established time allotments established on the agenda. The group can then adhere more rigidly to the time frames or negotiate a change to the agenda.
- **Process Observer:** Monitors how the group is functioning and reports on concerns or suggestions for process alterations.

It is possible to rotate these roles at each meeting or on some agreed upon schedule. Another role that may not be suitable for rotation is that of **Librarian**. The librarian keeps all the group's records including minutes, reports, resource materials, correspondence and the history. An organization without a good record keeping system may be inflicted with amnesia.

The advantage of sharing leadership roles is that it creates a sense of shared responsibility and ownership for meeting outcomes. It also encourages a higher level of personal growth and builds the depth of human resources within the group. Rotating roles can reduce burnout, neutralize turf issues and alleviate power conflicts. The disadvantage is that it requires extra energy and time for inexperienced members to gain the skills and confidence required to proficiently fulfill their assigned roles. This requires an enhanced level of patience and tolerance as members may experience a loss of continuity from meeting to meeting.

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[More About Facilitation and Facilitators](#)



Community Leader Guide



More About Facilitation and Facilitators

What does "facilitation" mean? The origin of the word means, "to make easy." The job of the facilitator is to help make it easy for the group to get its work done. Facilitation is a special form of meeting leadership that requires a combination of technical skill, objectivity and, often courage. The facilitator manages the discussion and guides the participants to achieve a clear understanding of the agenda

item, the identification and merits of alternative actions and a final decision.

When should an outside facilitator be utilized? There are three situations that require external facilitation leadership. First, where people who hold varying levels of power are meeting together to determine important strategic directions for the organization or develop long range plans. Second, when complex problem solving or transformative planning requires specialized expertise and group decision-making techniques that are only available through an external source. Third, when it is important that all members of the group have an opportunity to participate in the resolution of the item under consideration.

Who should be the facilitator? Traditionally the presiding officer of the group fulfills this role. However, under a shared leadership approach the responsibility for facilitation can be rotated among agenda items or from meeting to meeting. Ideally, every member of the group should accept some responsibility for making things run smoothly and making the meeting go "easy." In the special situations described above an individual with no ties to the group may need to be brought in to provide assistance.

The attributes of a good facilitator are described as follows:

- **Objectivity** - A competent facilitator must set personal desires and biases aside and operate within the bounds of group generated discussion.
- **Communication** - A facilitator must model how to engage in relationships characterized by mutual respect. They need to be able to a) paraphrase and do perception checks, b) help everyone participate in the discussion and resolution, c) interpret nonverbal messages, and d) recognize and accept cultural norms different from their own.
- **Teambuilding** - The facilitator needs to help the group grow by focusing the group's attention on the dynamics of its own operation. The facilitator may need to help a group establish and enforce the ground rules by which it operates.
- **Planning Skills** - The facilitator needs to help the group accomplish its tasks by using problem solving techniques, accessing external information, and reaching group agreement on its purpose, goals, and strategies.
- **Collaborative Skills** - The facilitator needs to be able to identify other groups in the community whose cooperation or resources are needed. The knowledge and experience required to help a group form workable partnerships is also desirable.
- **Motivation for Personal Development** - Facilitator skills grow over time and through practice. Good facilitators seek opportunities for training and ask for feedback so they can continue to improve their effectiveness.



Community Leader Guide



Dealing with Difficult Members or Meeting Situations

One of the purposes of holding a meeting is to provide an opportunity for involvement by the members. However, sometimes individuals engage in behaviors that limit the participation of other members or prevent the group from accomplishing its task. Every group seems to have one or more of these individuals; the member who constantly complains but never offers a solution; the individual who

rambles on switching topics with no concern for the planned agenda; the member who delights in verbally attacking the leadership; or the heckler who responds to every suggestion or idea with sarcasm and "put downs." Fortunately, difficult members are few. Unfortunately the havoc they wreak can be devastating.

The table below lists some specific, troublesome behaviors and provides suggestions for coping:

Coping With Difficult People

Type of Difficult Behavior	Ways to Cope
<p>Complainers gripe continuously but never act to resolve the reason for their unhappiness.</p>	<ul style="list-style-type: none"> ● Listen attentively. ● Acknowledge and paraphrase the complaint. ● Don't agree or disagree. ● Keep conversation focused on the complaint. ● Pin the complainer to specifics. ● Avoid the accusation-defense-reaccusation loop. ● State the facts without comment or apology. ● Move to a problem solving strategy. ● Be prepared to start this process over several times. Complainers do not want to solve the problem. This robs them of their power.
<p>Super-Agreeables are sincere, supportive and agreeable to your face or in public, but may act in a contrary way behind your back. They often fail to follow-through on commitments.</p>	<ul style="list-style-type: none"> ● Make honesty non-threatening. ● Be personable if it is genuine. ● Curb their willingness to make commitments they cannot possibly fulfill. ● Seek win-win situations. ● Establish specific responsibilities and deadlines. ● Listen carefully as the truth often lies in their humor.
<p>Negativists object to everything and assert that whatever is proposed won't work or is impossible. They rob any group of enthusiasm and optimism.</p>	<ul style="list-style-type: none"> ● Counter their attitude with realistic optimism. ● Do not agree with them. ● Don't hurry to propose solutions. ● Use their negative attitude as a "devil's advocate." ● Work with those who are enthused.

<p>Silent-Unresponsives appear indifferent and answer every question or request for help with a short nod or grunt.</p>	<ul style="list-style-type: none"> ● Ask open-ended questions. ● Use the friendly, silent stare. ● Pause for long periods, inviting them to fill the void. ● Comment on what is happening in the discussion. ● Break the tension by helping them say what is on their mind. ● Recycle the conversation back to them.
<p>Indecisives put off making a decision until it is too late or the decision is made for them.</p>	<ul style="list-style-type: none"> ● Bring issues out in the open and deal with them directly. ● Engage them in problem solving activities. ● Identify all alternatives and prioritize. ● Provide lots of support after they make a decision. ● Watch for signs that the stress of making a decision is getting too high. ● Stay focused on the issue and don't allow deflection.
<p>Hostile-Aggressives intimidate and bully others to get their own way. They use anger and cutting remarks to cower others into following their lead.</p>	<ul style="list-style-type: none"> ● Confront but do not threaten. ● Give them time to run down. ● Forget being polite, charge in and make your point. ● Ask them to sit down. This reduces their aggressiveness. ● Speak to the issue, do not launch a personal attack.
<p>Know-It-All Experts want you to believe they know all there is to know about anything worth knowing. They are usually condescending, imposing or pompous.</p>	<ul style="list-style-type: none"> ● Do your homework on the subject. ● Provide adequate background materials for group members. ● Listen and acknowledge what they say. ● Question them firmly but do not attack. ● Avoid being the counter-expert.

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[Problems During the Meeting](#)



Community Leader Guide



Problems During the Meeting

Disruptive situations and/or problems can arise while the meeting is in progress. These situations create tension within the group and can totally derail the discussion. The table below summarizes commonly occurring problems and provides suggestions for their resolution.

Summary of the Problem	What to do?
<p>Domination When one or a few dominate the conversation.</p>	<p>Get the silent ones involved.</p> <ul style="list-style-type: none"> • Ask direct questions. • Use direct eye contact to elicit a response. • Use a round robin where each member is asked to comment. • Use small groups.
<p>Disagreement/Conflict When two or more are in conflict and become abusive toward each other.</p>	<p>Separate and refocus.</p> <ul style="list-style-type: none"> • Physically step between and divert attention to you. • Redirect conversation back to the issue and away from individuals. • Do a <i>pro</i> and <i>con</i> analysis of the ideas or options presented involving the whole group.
<p>Anger/Verbal Abuse Sometimes the anger is directed at you!</p>	<p>Do not get defensive. Change their expectations.</p> <ul style="list-style-type: none"> • Acknowledge the criticism or concern. "I hear that you have a concern regarding..." • Try to determine the source of the anger. • Deal with the concern directly or involve the rest of the group. "How would you suggest we manage this? Does anyone else feel this way?"
<p>Old Baggage Old adversaries continue to dredge up old business.</p>	<p>Refocus on the issues and agenda items.</p> <ul style="list-style-type: none"> • Try to prevent through ground rules and the use of a bin where non-agenda items are recorded but not acted on until later. • Redirect the conversation back to the agenda. • Ask direct question regarding relevance. • Use small groups to separate adversaries and refocus the discussion.
<p>Left in the Dust Background information being presented is far too complicated or voluminous.</p>	<p>Prevent through advanced planning.</p> <ul style="list-style-type: none"> • Clarify objectives ahead of time and set limits. • Narrow the focus. • If possible, review presentation ahead of time. • Give presenter a quick reminder ahead of the meeting.

	<ul style="list-style-type: none"> ● Offer to diagram or outline the main points on overhead or large sheets of paper. ● Solicit all questions at one time, record them and have presenter summarize the answers.
Snail's Pace Slow pace of progress is leading to general frustration.	<p>Acknowledge the frustration; be positive.</p> <ul style="list-style-type: none"> ● Ask the group to assess what is going on. ● Review the process and acknowledge the difficulty of the work. ● Be open to changes in the process and ask the group for suggestions. ● Final decision is the accumulation of many small decisions. ● Acknowledge and reinforce the progress that has been made. ● Often need to go slow to go fast.
Burnout Group lacks energy, seems bored, dozing.	<p>Need to inject energy.</p> <ul style="list-style-type: none"> ● Find out what is going on from the group. ● Take a break. ● Change the process, engage in small group work. ● Change the pace, go for a walk, serve refreshments, work standing up, etc.
Late-In/Early-Out People arrive late and sneak out early	<p>Clarify expectations and establish ground rules.</p> <ul style="list-style-type: none"> ● Agree on a ground rule that members will arrive on time and stay to adjournment. ● Begin and end meetings on the times stated. ● Ask at the beginning of the meeting if there is anyone who must leave early. ● Schedule most important items at the beginning of the meeting. ● Remember, the world is run by those that stay to the end of the meeting.
I Quit Participant quits and leaves the meeting.	<p>Determine the cause for the reaction and attempt to reengage.</p> <ul style="list-style-type: none"> ● Try to get a statement of concerns before the exit actually happens. ● Engage group in an exploration of cause and ways to repair damage. ● Make an appointment and have a private meeting.
What's Happening? People have different understandings of the outcomes and decisions from previous meetings.	<p>Engage group memory and the written record.</p> <ul style="list-style-type: none"> ● Review minutes, notes, or any other written record. ● Ask for group recollection but avoid a debate. ● Do not attempt to reconstruct the past but rebuild the agreements.



Community Leader Guide



Meeting Evaluation Tools

Since so much group work occurs during meetings, it is important to periodically evaluate how things are going. There are four simple evaluation methods described in this section.

1) **Self quiz for the meeting leader:** How do you think you are doing? This self-assessment should be completed at least once a year.

Evaluating Your Leadership Effectiveness: A Self-Quiz

Keep these self-assessments in a file and periodically review them to determine your growth and development as a meeting leader.

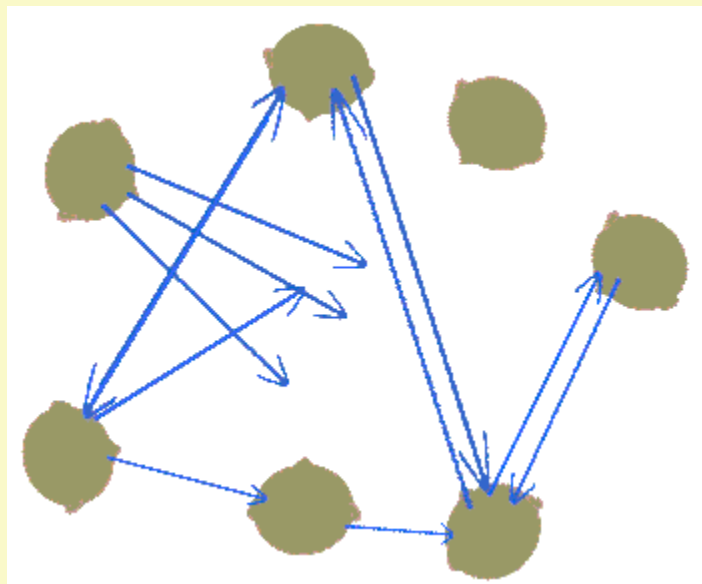
2) **Group survey of the meeting process:** How does everyone else think the meetings are going? It will only take a few minutes for everyone in the group to complete the form below and pass it in. The results can be summarized and discussed on the spot or at the next meeting. Open discussion of such questions as "do a few members dominate most discussions?" and "do people really listen to one another in the group?" will help everyone accept responsibility for productive behavior.

Group Evaluation of the Meeting Process

3) **Process Observation:** A member of the group or a person from outside the group can be asked to observe and evaluate the group's effectiveness and teamwork. This requires specific skills and can sometimes result in group awareness of a pattern that they have become oblivious to. In small groups, whose members know one another socially, it is difficult for members to criticize each other's behavior. Over time, groups can become so accustomed to certain behaviors that they no longer realize their ability to function effectively is being limited.

What is a process observer? This role involves being an objective observer, interested but not seeking to influence the group's process or decisions. The process observer is someone asked by the group to observe and provide feedback regarding the functioning of the group. In a sense, the process observer holds up a "mirror" and helps the group to see how they really work together.

Is there a technique to help with the observation? Draw a circle for every person in the group placing the circles in same relative position as the people actually occupy. For example:



Each time a person speaks, draw a line from that person to the one (s)he is addressing. If (s)he is

speaking to the entire group, have the arrow end in the middle of the drawing. Keep track of the number of times each person speaks using the categories in the table below:

Member ID	Giving an Opinion	Stating a Fact	Presenting an Idea	Unrelated Comments

As you make this "discussion map" pay attention to whether:

- Points are being made clearly.
- The agenda is being followed.
- Only a few dominate the conversation.
- Non-participating members are being encouraged and included.
- The group comes to closure and makes decisions.

How does the process observer report back to the group? The process observer does not generalize or judge, but tries to describe accurately specific behaviors. Individuals are never identified by name. Only the behaviors that were observed are identified. An example of such a report is as follows:

- The meeting started 10 minutes late and extended 30 minutes beyond the announced ending time.
- All agenda items were covered but only one was brought to closure even though the need for a decision was identified on half the items.
- Of the six members, two never spoke and one dominated the conversation. There was no noticeable effort to involve the non-participants.
- Side conversations including jokes and sarcasm were noted three times.
- One individual seemed totally withdrawn from the proceedings.
- All members seemed at ease and comfortable.
- There was an effort to change the pace when it was obvious that members were wearing down.

Following the report the group can decide how they will correct the deficiencies and reinforce the strong points of the dynamic interaction exhibited by group members.

4) **Debriefing:** Debriefing is a systematic review of an activity or meeting after it has taken place. The purpose is to review and summarize what has happened to see if there is a common understanding of how things are going. Deficiencies and concerns as well as strengths and positive outcomes are identified and discussed so the next meeting or activity can be better.

To conduct a debriefing the members of the group respond to questions such as:

- What was accomplished?
- What happened as a result of what we did?
- What are the next steps?
- What went well? What went poorly? Why?
- What viewpoints are missing from our discussion?
- What changes do we need to make?

For small groups, where people have worked together before, the discussion may only require brief notes and a short addendum to the meeting minutes. In a larger group, or one where people's experience with each other is limited, a recorder should keep a visible record of the comments and submit a more extensive report.



Community Leader Guide



Meeting Evaluation Tools

Evaluating Your Leadership Effectiveness: A Self-Quiz

After a meeting where you provided the leadership, rate yourself on the following items:	Great	Good	OK	Not So Good	What I need to do to improve
I did my homework and was prepared.					
I reviewed the agenda at the beginning of the meeting.					
I made sure the purpose of the meeting was clear.					
I made sure the status of each agenda item was clear as it was introduced and considered.					
I drew non-talkers into the discussion.					
I kept the discussion focused on the agenda item under consideration.					
I periodically summarized the discussion.					
I started and ended on the times announced.					
I effectively managed and/or neutralized disruptive people or situations.					
The purpose for the meeting was accomplished					
Other:					

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Community Leader Guide



Group Evaluation of the Meeting Process

Rate each item on a scale from 1 to 5. (5 = "operating ideally" 1 = "missing completely")

Listening Members don't really listen to each other. They interrupt and don't try to understand others.	1	2	3	4	5	All members really listen and work hard to develop a common and shared understanding.
Open Communication Members are guarded and tentative in discussions. The environment is not considered safe.	1	2	3	4	5	Members express both thoughts and feelings openly. The environment is safe.
Mutual Trust Members are suspicious of one another's motives.	1	2	3	4	5	Members trust one another and do not fear ridicule, reprisal or rumor.
Attitudes about Differences Members avoid arguments, smooth over differences, suppress or avoid conflicts.	1	2	3	4	5	Members search for and accept differences and work through conflict openly. There is no pressure to conform.
Mutual Support Members are defensive about themselves and their functions.	1	2	3	4	5	Members provide each other with the needed support. They are able to offer and ask for help.
Participation A few members dominate the discussion.	1	2	3	4	5	All members are encouraged to be actively involved. Ideas and thoughts are welcomed and members are free to participate in anyway they choose.
Shared Power The leader or officers carefully control the process and predetermine outcomes.	1	2	3	4	5	All members participate in the discussion and decision making processes.
Flexibility The group is locked into established rules and procedures are difficult to change.	1	2	3	4	5	The ideas and opinions of the group are frequently sought regarding changes in procedure.
Use of Member Resources Individuals' knowledge and abilities are not used.	1	2	3	4	5	Each member's knowledge and abilities are fully utilized.
Objectives Objectives are not clear or understood. There is little commitment to decisions made or the group's mission.	1	2	3	4	5	Objectives are clear and understood. There is a commitment to follow through on decisions and accomplish the group's mission.
Task Accomplishment Nothing ever gets done.	1	2	3	4	5	The group frequently reaches its goals.
Action Planning The implementation of decisions is never formalized and assignments are never given.	1	2	3	4	5	Action plans routinely follow decisions and assignments with deadlines are made.
Enjoyment Members do not look forward to attending and generally do not consider the meeting fun.	1	2	3	4	5	Members look forward to participating and have a good time.



Community Leader Guide



Summary

Remember that people's energy, interest, and time represent the most important resources you have. Face to face meetings are critically important places for the expenditure of these resources. Use these resources wisely by:

- Making certain that the issues are sufficiently important to warrant a meeting.
- Investing heavily in the preparation and planning of the meeting.
- Respecting the individuals' presence by ensuring a comfortable environment for the members to work in.
- Preparing an agenda and doing everything you can to make sure members are prepared to participate.
- Keeping the discussion on track and focused.
- Give members a sense of accomplishment by working to bring closure and make decisions where that is the needed outcome.
- Creating a safe environment where people are not threatened and can participate freely.
- Establishing ground rules and enforcing them.
- Starting and ending the meeting on time.
- Creating an environment where people can enjoy themselves and have fun.
- Creating a written record of the deliberations and decisions.
- Periodically taking stock of how you are doing through an evaluation process.

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[Volunteer Management](#)



Community Leader Guide



Introduction: Volunteer Management

Volunteers are critical to most community development projects. Yet conscious volunteer management practices are often overlooked. We tend to take our volunteers for granted. After all, aren't they sustained by personal zeal and commitment? If you have worked with volunteers (or been one) for any length of time, you will know the answer is NO!

Eventually, volunteers will not continue working if they do not receive training, support, and appropriate recognition.

This chapter is designed to give you the tools necessary for a successful long-term relationship with volunteers who are carrying out an action plan. Subjects covered in this chapter are:

Things I Need to Know About Volunteers	
1. Who Volunteers?	1. This includes ideas about how to recruit volunteers and two assessment tools that help you look at how to keep volunteers motivated.
2. How to Manage Volunteers	2. This section provides an overview of rights and responsibilities and basic structure and functioning as well as tips on using volunteers on committees.
3. Boards and committees	3. Boards and committees are a crucial part of the volunteer structure of most organized efforts.
4. When Volunteers are not Enough.	4. As a lead-in to the next chapter (on fundraising), some tips on selecting a consultant are provided.

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[Who Volunteers?](#)



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Community Leader Guide



Who Volunteers?

Aspects of Recruiting Volunteers.

To recruit, you need to answer these basic questions:

1. **Why**

What is your purpose in seeking volunteers? How will they fit into the overall purpose and structure of the organization?

2. **What**

What exactly will the volunteer(s) be doing? Write a simple job description. The action plan for a project may serve as an orientation to the job but usually the action steps may still be somewhat general and can create confusion about exactly how to proceed.

3. **Who**

Who are the types of people in your community most likely to possess the skills and attitudes needed for that job description?

4. **When and Where**

Where are those people likely to be found? The attached form called "Twelve Types of Volunteers" can help you target your recruitment effort.

5. **How**

Once you find some candidates for this unpaying job, how do you persuade them to volunteer? Later in this section are two assessment tools regarding what motivates volunteers. Ask a potential volunteer to fill out the assessment as a way of matching their interests to the right job.

Recruitment Ideas

1. Offer slide show programs showing clients being served by volunteers.
2. Make a presentation at pre-retirement seminars about ways to become involved.
3. Present a program on local cable TV.
4. Never walk away from a meeting without getting the name and phone number of anyone who expressed interest in your project.
5. Encourage volunteers to make presentations to groups about their experience.
6. Ask other organizations in your area to help your recruitment effort by giving you time on their meeting agendas or posting information on bulletin boards.
7. Have someone research other groups who are involved in activities similar to yours. People in these programs may be prospective recruits for your project.

8. Ask the newspaper to write an article about your project and the opportunities for volunteers.
9. Contact high school and college teachers who teach subjects that coincide with your project's purpose to see if volunteering with you can become part of a class assignment.
10. Think about recruiting whole groups to help you with a project. Recruit the local National Guard to serve as safety marshals for your special event. Ask the Lions Club to co-sponsor and help operate an event. Get the Toastmasters group to serve as your Speakers Bureau.
11. When trying to recruit someone who is a leader in another setting, take along a member of that group (church, school, agency, or business) to help persuade them.
12. Speak the language of the person you are trying to recruit. Ask yourself "What do we do that would be of interest to them?" and highlight this in your presentation.
13. Tell why you are personally committed to the project you are recruiting for. It personalizes the discussion as well as stimulating possible motivation.
14. Always recruit volunteers on the basis of the needs of the clients, not the needs of the organizations. People work for people, not things.
15. Tell people what they will do, how long they will be expected to do it, and who will benefit. Never minimize the work or the time needed.
16. Avoid "first warm body through the door" recruitment. If you can't get the right person, don't take anybody.
17. Ask grocers to stuff flyers into grocery bags about your project.
18. Break large jobs down into smaller components and recruit people for the lesser time-consuming components.
19. Ask current volunteers to recruit their friends. Sponsor a "Bring a Friend" meeting with refreshments to share the news about the project.

Research suggests that there are three main categories of what motivates people to volunteer: achievement (to get something done); power (to influence what is happening); and affiliation (to be with others). The kind of jobs one is attracted to and the types of rewards that interests a person depends on which category of volunteer one best fits in.

Have volunteers fill out the assessment on the next page so they can be used in roles that are most likely to keep them motivated.

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[Twelve Types of Volunteers](#)



Community Leader Guide



Twelve Types of Volunteers

Twelve Types of Volunteers		
Use this worksheet to tailor your recruitment strategy		
Type of Person:	Where to Find Them:	Best Ways to Involve Them:
1. High School Students		
2. College Students		
3. Working Men and Women		
4. Mother at Home		
5. Volunteering to lead		
6. Single adults		
7. Professionals		
8. Retired People		
9. Newcomers		
10. Minorities		
11. Low Income		
12. Other:		



Community Leader Guide



A Quick Assessment of Motivational Needs

Choose the one statement that seems most true for you. There are no right or wrong answers. No one else will see your responses.

1.
 a) I like to work alone
 b) I like to work with others.
 c) I can work alone or with others.
2.
 a) I'm happy working closely with people to develop and complete a project.
 b) Just give me directions and let me "go at it."
 c) Let me plan a whole project and get it started myself
3.
 a) I like to influence other people
 b) I like knowing that what I do makes people happy
 c) I like the feeling that I'm doing a really good job
4.
 a) I enjoy getting to know people by working with them.
 b) I enjoy wrestling with problems.
 c) I enjoy teaching other people.
5.
 a) Before I begin, I want to see the standards against which I'll be judged.
 b) Before I begin, I want to see the organizations goals.
 c) before I begin, I want to know with whom I'll be working.
6.
 a) I want to be perceived as a competent leader
 b) I want to be perceived as an effective worker.
 c) I want to be perceived as a good person.
7.
 a) A successful job for me is one where we feel like a family.
 b) A successful job for me is one where I've taken a leadership role from start to finish.
 c) A successful job for me is one where I've exceeded expectations.
8.
 a) I enjoy being able to direct others.
 b) I enjoy being sensitive to the needs of others.
 c) I enjoy competing with others.

9.

- a) I appreciate having made friends while working on a project.
- b) I appreciate a tangible reward at the end of a project
- c) I appreciate having a clear line of authority on a project.

10.

- a) I like a good challenge.
- b) I like a good argument.
- c) I like a strong feeling of camaraderie.

11.

- a) I want to be popular.
- b) I want a position of status and respect.
- c) I want to do important work.

12.

- a) I would like my ideas to predominate.
- b) I would like to know that my work has helped others.
- c) I would like to be promoted because I've done a good job.

13.

- a) In meetings, I'm most comfortable leading the discussion.
- b) In meetings, I get bored until we finally decide which action to take.
- c) In meetings, I enjoy the detail work such as providing name tags for everyone, providing refreshments and helping people feel comfortable.

14.

- a) I lose track of time when I'm involved in a challenging project.
- b) I lose track of time when I'm working with interesting people.
- c) I lose track of time when I'm involved in a good debate.

15.

- a) I like to start a project on my own initiative.
- b) I like to work on a project with others.
- c) I like to finish a project successfully.

16.

- a) I prefer to work with people I know well.
- b) I prefer to work with people with a proven track record of getting things done.
- c) I prefer to work with people who will take my lead.

Credit: McClelland's Motivation Model



Community Leader Guide



Key To Quick Assessment

Look at your answers. Next to each number on this page, circle your response. Total each column. You tend to be motivated by the need at the top of the column that has the largest number. If one column is not stronger than another, it means that you are motivated by more than one need.

Achievement		Affiliation		Power	
1.	a	1.	b	1.	c
2.	b	2.	a	2.	c
3.	c	3.	b	3.	a
4.	b	4.	a	4.	c
5.	a	5.	c	5.	b
6.	b	6.	c	6.	a
7.	c	7.	a	7.	b
8.	c	8.	b	8.	a
9.	b	9.	a	9.	c
10.	a	10.	c	10.	b
11.	c	11.	a	11.	b
12.	c	12.	b	12.	a
13.	b	13.	c	13.	a
14.	a	14.	b	14.	c
15.	c	15.	b	15.	a
16.	b	16.	a	16.	c

Three Types of Volunteers

Research suggests there are three basic types of volunteers:

- Achievement Motivated:
 - a desire for excellence
 - a sense of important work to be done
 - the possibility of advancement
 - likes success in a situation resulting from strong performance
 - needs feedback as a reward

- Power motivated:
 - likes to lead
 - likes a job with status
 - likes influencing others
 - likes to give advice
 - likes ideas to predominate

- Affiliation Motivated.
 - wants to be popular
 - desires interaction
 - dislikes being alone
 - wants to help others
 - likes working with other people

Understanding these differences can help you select the jobs and rewards that best suit a particular volunteer's motivation. Use the quick assessment with your volunteers and match your behavior and selection of activities accordingly.

Credit: McClelland's Motivation Model



Community Leader Guide



How to Manage Volunteers

Rights and Responsibilities of Volunteers

Rights:

- To be given worthwhile jobs
- To be kept informed
- To be trusted
- To be trained and supervised
- To be given recognition and integrated into the entire project

Responsibilities:

- To accept only realistic assignments
- To state his/her limitations
- To follow the agreed upon plan
- To report all activities

Responsibilities of Leaders Working with Volunteers

Rights:

- To decline unacceptable volunteers
- To know the limitations and expectations of volunteers
- To expect volunteers to report on their activities

Responsibilities:

- To define jobs clearly
- To orient volunteers to jobs
- To monitor volunteer's progress
- To provide needed support/resources
- To recognize volunteer contributions

Principles of Volunteer Management

There is a large list of publications on volunteer management with more information; but the basic ingredients of good volunteer management are:

1. Volunteers are given meaningful tasks that are suited to their interests and abilities.
2. Volunteers are given an orientation to the project/committee/board/ event.

This includes:

- a mission statement,
- clear goals,
- action plans,
- a job description or expectations of committee membership.

3. Volunteers are provided training both formally and informally to give them the knowledge and skills needed to be successful at the job.

4. The volunteer's personal needs are recognized and accommodated as much as possible.

5. Volunteers should be evaluated regularly, given clear feedback, and encouraged to grow. Volunteers can grow stale in a position or outgrow a job. Careful monitoring ensures that the tasks are carried out and that the volunteer's potential for growth is maximized.

6. Volunteers should be recognized. From a simple "thank you" to an awards dinner, appreciation makes a difference in retaining good volunteers. Remember that some volunteers want public recognition; others prefer a very personalized, one-on-one form of recognition.

7. Good volunteer managers seek feedback from volunteers as goals and action plans are updated or to make sure that plans make sense to those who will carry them out.

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[*Volunteer Boards and Committees*](#)



Community Leader Guide



Boards and Committees

As a group incorporates or becomes more formalized, it tends to be structured into a board with working committees. For some small groups the two functions are the same as the volunteers both plan and carry out their own activities. For a larger-scale or

long-term community effort, however, there will usually be an executive committee of the larger group. This corresponds to a board of directors in a non-profit agency.

What is the purpose of a board?

The board "sees the forest, not the trees." Its purpose is to provide overall direction and remind participants of the goals that they are working for. A board makes major policy decisions and handles problems that cannot be resolved at the working level. If there are paid staff, the board hires and fires the director who then provides the day-to-day supervision of the staff. If there are only volunteers, the board members work alongside the volunteers as peers or coaches and help monitor the day-to-day activities.

What is the purpose of a committee?

Despite many jokes about committees (the unwilling lead by the incapable to accomplish the unnecessary), committees are working groups that "tend the trees." Generally speaking, boards accomplish little if they do not have some kind of committee structure. Committees are composed of volunteers who carry out specific assignments. They might develop proposals or they might be implementing specific action steps of an already adopted plan.

What are common problems of volunteer boards and committees?

All of the things discussed in earlier chapters are relevant to productive functioning of a board or committee's interpersonal communication skills, team development, a solid planning process, and good meeting management. These are the backbones of a successful board or committee. The problems identified in those sections continue to be common to volunteer groups: lack of clear or caring communication, a sense of "not belonging", confusion about what is going on, and a feeling that meetings are a waste of time. Each of these problems can be solved by practicing the skills discussed in this guide.

More specifically, the next pages provide a Board Questionnaire that will help evaluate how a board is functioning. Common problems at the board level include confusion between policy and operations (board and staff volunteer responsibilities), forgetting the overall purpose for which the group was created (the means to an end become an end in itself) and lack of a working committee structure to carry out business. Common problems for committees include: lack of clarity of purpose, confusion about who is in charge, and insecurity about what tasks need to be accomplished when. In brief, lack of a written action plan.



Community Leader Guide



Board Questionnaire

As a member of any board, you will need to understand the history, structure, and operating style of the entire organization and of the board itself. This checklist can help orient you as well as enable you to analyze the board's strengths and needs.

Please answer all questions even if you are uncertain. Use a question mark instead of a check if you are not sure.

Orientation and training			Operation		
Do board members receive:	Yes	No	1. In meetings do you;	Yes	No
the history of the organization			use Parliamentary Procedure		
the by laws					
board policies and procedures			know how to get issues on the agenda		
job descriptions for board members			Know how to bring a decision to closure		
annual workplan for the organization			2. About finances do you;		
orientations at the start of their term			get a regular financial report		
annual training session/retreat for all			understand the financial report		
			3. Do you participate in shaping;	Yes	No
Organization and function			goals and objectives		
1. Does your board use standing committees such as:	Yes	No	the budget		
executive committee			evaluation procedures for staff/volunteers		
finance/fundraising			evaluation procedures for the programs		
long-range planning committee			board meeting agendas		
project-specific oversight committees			Board and Community Relations Fill out the Group Process Survey to evaluation how relations are between board members or group members at organizational meetings.		
2. Does your board evaluate;	Yes	No	Is the board:	Yes	No
staff of the organization			familiar with economic or government trends that will affect the organization's programs		
volunteers			activities of similar community organizations		

goals and objectives			active in explaining the organization to the community at large	
program accomplishment			Comments:	
3. Do you understand your role in;	Yes	No	1. What do you consider to be two strengths of this board;	
policymaking vs. administration				
fundraising for the organization				
representing client or community interests			2. What do you consider the board's two greatest needs at this time:	
your legal and financial liability				
acting as a board member and not as an individual				

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[Writing Committee Guidelines](#)



Community Leader Guide



Committee Guidelines Worksheet

Committee Name:

Committee Goals:

Tasks	Dates
<ol style="list-style-type: none">1.2.3.4.5.6.	<ol style="list-style-type: none">1.2.3.4.5.6.

Recommended committee size: 5-7 people

Staff you need to work with:

Overall time commitment:

The Committee reports its recommendations to:

Other:

Committee Guidelines Worksheet

Committee Name: Public Relations	
Committee Goals: 1. Review all publicity material 2. Assist in media contacts as needed 3. Develop new P.R. campaigns to support program 4. Develop P.R. guidelines Evaluate existing P.R.	
Tasks	Dates
1. Review all publications designed for public 2. Assist in publicizing the project 3. Review annual work program in terms of public relations needs 4. Arrange for committee members to assist groups 5. Develop a yearly committee work plan in line with the organization's goals 6.	1. As needed 2. On a monthly basis 3. December 4. Identify timeframes of specific groups 5. January 6.
Recommended committee size:	
Staff you need to work with: funding source has media specialist	
Overall time commitment: 3 hours each month for one year	
The Committee reports its recommendations to: Liaison X on the Board of Directors	
Other: experience in writing or public media would be helpful.	

Job Descriptions: Example Public Relations Committee

Qualifications:

1. A personal interest in public relations
2. A working knowledge of the mission and programs of the organization
3. A willingness to participate in public functions and work outside the committee on behalf of the project
4. Willingness to attend 6-8 committee meetings per year
5. Chairperson should have one year previous experience on the committee and/or excellent working knowledge of media and public relations skills
6. Chairperson should attend meetings of the board of directors as requested.



Community Leader Guide



When Volunteers Are Not Enough

If your project has grown too big for volunteers to handle but does not require an incorporated organization with salaried staff, you may want to look at hiring a consultant on contract for certain phases of the project. Here are some things to think about as your volunteer group begins the contracting process:

Some Do's and Don'ts:

Do

- Know what the project scope of work is and what the end products are to be before beginning a selection process
- Designate one person as the agency contact so that all consultants get the same story.
- Make all existing information about the project available to all the consultants who are competing.
- Tailor the selection process to the size of the job. Simplify it for small jobs.
- Ask for assistance from agencies experienced in consultant selection or even another consultant who is disinterested.
- Make the effort to perform independent checks to verify the consultant's qualifications and past performance.

Don't

- Put consultants through a selection process if you've already made your choice in advance.
- Ask an exorbitant number of consultants to submit proposals or appear at interviews.
- Interview consultants simultaneously or allow them to witness each other's interviews.
- Let estimated costs become the basis of your selection.

Consider the fact that most consultants put in a great deal of time and effort preparing qualification statements, proposals and interview materials for the selection process. An expression of gratitude towards those who are not selected is always appreciated. Also, if they ask for it a candid explanation of why they weren't selected helps them to strengthen their weaknesses so that they can be the most qualified consultant the next time.

These tips are equally true when and if you design a process for hiring a full or part-time staff person for a project



Community Leader Guide



Evaluation Criteria in Selecting a Private Consultant

Selection committees usually establish their own procedures and often have a rating system to compare consulting firms. Some of the criteria that have been used include:

Operational and maintenance costs of past projects	Location of firm and where decisions are made
Desire to do the work	Specialized and relevant experience
Innovative ability	Project team experience
Project manager's experience and capability	Ability to develop good working relationship between key members of the project team and your staff
Capacity to meet time schedules and varying demands	Firm's familiarity with project requirements and local conditions
Past performance on similar work	History of cost estimate accuracy
Community relations, skill in public meetings	History of using change orders on design work during construction
Inspection force availability	Cooperation with any other consultants on project
Extent of minority staff	Financial stability
Conflicts of interest with other area or client projects	Personnel turnover history
Value of distributing work to several consultants or consolidating with one firm Professional liability insurance coverage Others of your own choice	

Volunteer Management Review

	I am good at	I am fair at	I need help with
1. Being clear about the jobs for which volunteers are being recruited			
2. Recruiting participants			
3. Keeping volunteers motivated			
4. Delegating responsibility			
5. Helping workers chart their progress on a project			
6. Understanding the difference between policy and operations in my group			
7. Following through on my own volunteer responsibilities			
8. Knowing when volunteers are no longer enough			



Introduction: Fundraising

Sometimes to meet the goals and objectives of your group, you will need additional resources. Accessing resources then becomes just another phase in the overall process of your program or project. Typically the resources you need will be financial. There is no magic to fundraising. Overall you need to be a good planner, organizer, manager and marketer. The following menu options will get you started on the necessary course of fundraising.

1. Funding Sources	Things I Need to Know About Fundraising
2. Identifying In-kind Services	1. How do I develop a budget?
3. Raising Money	2. How do I ask people for donations?
4. Grantwriting	3. How do I coordinate a fundraising event?
5. Mistaken Beliefs About Grants	4. How do I write a grant?
	5. How do I look for funding sources?
	6. How do I manage a budget and report on progress?

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[Funding Sources](#)



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Community Leader Guide

Funding Sources

Hundreds of foundations exist in any large or even moderate-sized urban community. Find which ones are right for your coalition. The best approach is to identify initially a core of foundations that match your interest.

To learn about community, private and corporate foundations, write to the Foundation center, 888 Seventh Avenue, New York, NY 10106. They provide a catalogue that describes major sources of information about foundations. The Center also has a cooperating network of 90 library reference collections in all 50 states, Mexico and Puerto Rico. Contact the Center, (212) 620-4230, in New York to find out the location of the branch in your state.

The federal government prints sources of information that can alert you to available program grants. One of the most significant of these is the Federal Register, published each weekday. The "Highlight" section in the front lists major topics. The "Notices" section describes grant availability. Announcements are made of rules governing programs, so that though money is not immediately available, you can gain some idea of what grants are likely to be funded later. It is available at most major or public university libraries, or write to Superintendent of Documents, U.S. Government Printing Office, Washington D.C. 20402 for subscription information.

[Back to Fundraising](#)

[Identifying In-Kind Services](#)



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Identifying In-kind Services

For almost any cost, investigate the possibility of in-kind contributions. These often cover the entire cost of a service, staff person, etc., but they also can be used creatively with other funding. There are

several types of in-kind services:

- Space, including maintenance and utilities
- Staffing
- Clerical assistance
- Equipment and furniture
- Construction and renovation
- Printing facilities
- Transportation
- Public relations and promotional activities
- Recreational activities

Sometimes this type of resource is also called a "non-cash" contribution. Sometimes with foundation or government grants, "in-kind" services need to be documented carefully for audits, while the requirements for "non-cash" contributions are less rigid.

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[Raising Money](#)



Community Leader Guide



Raising Money

Before a group can raise money, the group should have credibility in the community. Building credibility takes time but it becomes the basis for any successful development program. People must be aware of you and have a positive impression of what you do and how you manage your resources before they will support you. The following outline provides you six steps to raising money.

Six Steps to Raising Money

1. Set program goals (**planning**)

- Develop objectives to reach your goals.
- Plan the methods you will use to reach those objectives.
- Design specific activities to carry out the methods.

2. Inventory all your resources.

- Preview all the people and organizations in your community who might be able to help.
- Brainstorm with key staff and volunteers. Develop a specific list of names, individuals, civic organizations, political organizations, media, businesses, etc.

3. Develop a fundraising campaign.

- A well-structured annual campaign includes the use of as many fundraising techniques as are necessary to move toward that ultimate goal.
- Bill Riley, Kansas 4-H Foundation Director, considers a good fundraising campaign like a baseball diamond. It has four major parts:
 - Vision - Goals, purpose, potential prospects.
 - Cultivation - Informs prospects of goals and current activities before the request for funds is made (brochures, media, contacts).
 - Solicitation - The actual request to potential donors for general or specific purpose and how they will be contacted.
 - Recognition - How you thank donors and inform the public when appropriate.
- To hit a "home run" with your efforts, all four parts should be developed before a campaign begins. Any costs associated with fundraising should be included in campaign budget (including brochures, postage, plaques or mementos), with the funds to be raised for program activities. There should be an ongoing, two-way relationship with potential donors, not just a "quick hit-and-run to the bank."



4. Assess your financial and personnel needs.
 - Decide what you need in people, money, services and products to reach the fundraising goals.
5. Implement fundraising activities.
 - New programs are best funded by one or two large gifts from foundations or corporations.
 - Programs that do not have new components are more easily funded through a variety of annual campaign activities, such as a membership drive and special events.
 - Development activities must be planned to support the programs.
 - Consider recruiting civic groups to do benefits: car washes, bake sales, a dance, a spaghetti dinner or fish fry. Not only do they raise money, but you have a great chance to educate them about the issues you are working to solve - with their support.
6. Evaluate your results.
 - Assess what went well and what went badly in every project as each is completed:
 - Did you reach the goals?
 - How much money did you raise before expenses?

[Back to Fundraising](#)

[Grantwriting](#)



Community Leader Guide



Grantwriting

If you decide to secure funding from an outside source you will probably need to write some type of a grant.

Many foundations are interested in helping reputable community groups in meeting local needs. Competition for funding can be stiff.

Generally, all funding organizations like to see an organized plan or proposal for upcoming activities and expenditures. It is not uncommon for a foundation to initially ask for a brief letter (two or three pages) telling about the organization, your plans and the amount of funding requested. These requests should describe the following in specific terms:

- The nature of the problem to be addressed.
- The solution proposed.
- Documentation of the group's ability to carry out the objectives.
- Financial needs associated with the request, including evidence that the effort will not rely solely on the funder's support.
- Documentation that a systematic evaluation will be carried out to demonstrate that funding has made a difference.

The process of preparing proposals for government funding depends on the funding agency. Although different programs may require different formats for the proposals, applicants for government funding should be prepared to include the following standard sections in their proposals.

1. **Proposal Summary** - The summary appears at the beginning of the proposal. It should interest the reader in what is to follow. When applications are screened, the summary may be the only part of the proposal read.
2. **Institutional Background and Qualifications** - The discussion of the organization should be clear and to the point. Leave a favorable impression without overloading the reader with unnecessary details.
3. **Statement of the Problem** - This is the most important part of the proposal. It tells the reader why you want to perform the activity for which you require funding.
4. **Program Objectives** - Program objectives need to be stated in measurable terms. Statements about objectives should be quantifiable: use terms like "to increase" or "to reduce" instead of ones like "to create" or "to provide."
5. **Methods or Technical Approach** - The next step is to explain the methods by which you propose to achieve your objectives. This section should present a reasonable scope of activities that can be accomplished within the time allotted for the program and the applicant's resources.
6. **Evaluation** - It is important to plan carefully the evaluation of your activities at the inception of the project and not as an afterthought. Many evaluations depend on measuring certain characteristics before the program activities begin. Funding agencies expect you to have given thought to evaluating the proposed program during proposal preparation.

7. **Future and Other Necessary Funding** - When requesting funding for a new project, financial planning should go beyond the proposed grant period. Show funders you are planning. The funding arena is a competitive one, and is not without its own policies. Few sources will fund any project beyond three years. They prefer to "rotate" resources since needs are always greater than dollars available in any year. They also want to avoid any long-term personnel costs, usually in the fringe benefit area.
8. **The Budget** - Varying degrees of detail are required in an estimated budget. Funding organizations usually provide budget forms and instructions for their completion. Be specific when preparing your budget. Funding sources do not like to see every cost estimate rounded upward and expect to be presented the true anticipated costs (to the best of your ability).

Basic Organizational Budgeting

One of the tasks you may face as treasurer or financial officer, especially if your organization transacts a lot of business, is that of preparing a budget. There are all sorts of methods for preparing budgets from flipping coins to using computers. No one method is best for all organizations. The method described is fairly simple.

What is a Budget?

An organization tool used for planning and controlling within an organization. It is a formal written guideline for your future plans of action, expressed in financial terms within a set time period.

What Can a Budget Accomplish?

- It can help refine goals that reflect realistic resources.
- It can compel members of the organization to use funds efficiently.
- It can provide accurate information to adjust, analyze, and evaluate programs and activities.
- It can aid in decision-making.
- It can provide a historical reference to be used for future planning.

Basic Components of a Budget

- A statement of the organization's goals, objectives and priorities (What do we want to accomplish? How will we accomplish this? How much will the program cost? How will the program be funded?)
- A method of reviewing budget plans and procedures.
- Budgeted financial statements:
- An estimated detailed income breakdown
- An estimated detail expense breakdown

Developing a Budget

- Begin preparations a month or more prior to the close of the current year.
- Prepare an outline of the organization's planned activities for the upcoming year.

- Determine available funds (carry over balance from previous years, cash on hand and funds in bank, interests, etc).
- Do careful studies of funding sources, costs, estimated and probably fundrasiers.
- Estimate expected income and whites it is expected to be available (dues, t-shirts, sales, pinball, etc.).
- Define needed expenses (club registrations, advertising, printing, supplies, etc).
- Get price quotations on certain expenditures, delegate certain responsibilities to members.
- Rank order by their relative importance, which activities are the wisest expenditures of funds.
- Choose and decide program initiate; ask yourselves, "how much is available to allocate?"
- Negotiate as necessary; eliminate less essential expenditures or limit certain expenditures.
- Revise, review, coordinate, cross-reference and then assemble into a final budget; the budget must be flexible to anticipate conditions which might have been overlooked during the planning process.

Managing the Budget

- Once approved, adopted and prepared it should be closely managed.
- Set and maintain a minimum cash balance.
- Formulate general policies and procedures needed to achieve objectives.
- Keep an accurate log of financial transactions (income and expenses): maintain in your organization record book (check and balance records periodically).
- Set up internal control designed for safeguards and accurate accounting data, this encourages adherence too.
- Control cost - allow only approved expenditures.
- Access budget at any given point of time during the budgeted period.

In national studies of sources of donations, 80% of private donations come from individuals. Only 5% comes from corporations, 5% from foundations, and 10% from bequests. These figures do not include government funding sources, but they remind us why paying attention to local funding sources is so important. Seeking a grant from an outside source (whether foundation, corporation, or government) is not the first place to begin your fundraising efforts.

However, if you have done all you can with local resources and are still lacking the funds to complete a valued project, it is time to consider grant writing. Who gives grants?

There are three possible sources for grants:

- State and federal government
- Private foundations
- Private corporations

The first two sources (government and foundations) have formal procedures established for all grants. Grants are "categorical," that is, money is allocated for very specific purposes. Who is eligible to apply for the money is clearly defined. The format for the proposal is usually specific and varies greatly from one source to another. Finally, there are established deadlines for application (usually once or twice a year).

Private corporations have a less formal pathway and set of requirements to access money. The largest corporations sponsor foundations as their main avenue for charitable giving. However, as we discussed in the last section, it is possible to approach large businesses directly if they operate in your geographic area.



Community Leader Guide



Mistaken Beliefs About Grants

Grants are free money. Writing a grant takes a great deal of time and time is money. Only 10% of the grants written, nationally, are funded. Finally, because grants have restrictions attached to them they can create extra burdens for an organization. Managing a grant most definitely takes time and...yes, time is money.

2. **A good grant proposal creates an illusion.** Grant reviewers are highly skilled in distinguishing false proposals from solid proposals. Reviewers are looking for an honest, straightforward, logical response to a documented need. They are also rigorous in requiring a reliable management structure to be in place to manage the grant money and make sure the proposed project is carried out as agreed on. no matter how exciting your dream is, you will not be funded without a businesslike plan based on your own committed resources.
3. **The secret to getting a grant is connections.** Connections won't get you a grant. A good project, well documented, might. However, developing personal contacts with foundation and agency staff who fund your type of project can mean timely notification and increased confidence in your organization. It may be such connections can make a difference between two equally good proposals when both cannot be funded, but connections will not substitute for a good proposal.
4. **The secret to grant writing is to apply everywhere.** This is called a "shotgun" approach and involves sending a "boilerplate" proposal to multiple sources. The fact is, 80% of those who receive grants have carefully targeted their proposal to the source they applied to. While your core proposal will remain the same, the emphasis in purpose and your method of achieving that purpose may be modified according to the specific funding source.
5. **Grants will save the organization.** If an organization needs to be "saved," it probably is not a good time to look for a grant. Managing grant monies requires clarity of purpose, good lines of communication between all participants, and ability to make decisions quickly and effectively, and good record keeping capacity. Problems in any of these areas may be worsened by the demands of managing a grant. Almost 40% of organizations surveyed reports grants as having a negative or neutral impact on their organization.



Community Leader Guide



What are the steps in writing a grant?

1. The first step is to have completed the planning suggested in Chapter 4 and to have accessed all appropriate local resources, as described earlier in this chapter. This means you have a clear, detailed plan with a budget. The budget will include what you already have as well as the shortfall you are asking the funding source to help you with.

2. Then you need to identify appropriate grant sources.

- a) There are three Funding Information Centers in Washington State: in the Seattle, Spokane, and Wenatchee main public libraries. The Spokane, FIC is the only one staffed with a funding specialist; the others use the other the regular librarian or reference librarian. These centers have the key publications needed to identify funding sources, such as The Foundation Directory and Corporate Giving Directory as well as the best books and newsletters with tips on fundraising.
- b) Ask other organizations who are doing similar work. The Department of Community Development Community Revitalization Team (CRT) can help refer you to a wide variety of state grant programs. Your local Cooperative Extension agent can help refer you to sources for funding, including private foundations via the Washington State University Downlink to several clearinghouses.

Addresses and phone numbers for these key information points are in the Appendix. As you identify grant sources that sound suitable to your purpose, call or write for a set of application materials.

3. Decide whether or not to apply.

a) Look first to see that:

- you are an eligible applicant. If you are not, but your project is clearly aligned with the funding guidelines you may want to look for an eligible group in your community who would sponsor the grant, writing your group in as actors.
- the budget requirements and timeline of the funding source are aligned with the funding needs and timeframe of your action plan
- you can meet the deadline for applying

b) If the answer is yes to all of the above questions, then look closely at the goals and intent of the funding source and compare them to your own goals and philosophy. If they are not well aligned, you may be able to stretch your project to meet their intent but your chances of success are reduced because you will lose clarity and you may be sorry later if you can't reach the original goals of your project.

c) Find out how competitive the field is. If competition is high, you will need to have a perfect match with the program goals to be successful.

d) Look at the selection criteria to see if your project meets all their criteria. Try to judge where your strengths and weaknesses will be.

e) Finally, look at the procedure for administering the grant, to see if it is something you really want to receive. You may need to talk to the staff/volunteers about this:

- how you'll be required to document costs
- when and how you'll receive the money (can you "front" the costs and get reimbursed later?)
- other reporting and record keeping requirements

4. If you decide to apply, then organize your grant writing process.

a) Allocate plenty of time. It always takes longer than you expect, regardless of how far along you are in the project development process when you decide to apply for the grant. Start with the deadline date and work backwards. Include several earlier deadlines for review and revisions. Consider lengthy process that may be required:

- surveys
- adoption by a council or board
- intergovernmental review process
- legal requirements for public meetings

Draft a calendar of team meetings and public meeting dates around this overall schedule.

b) Create a grant writing team. You will need someone with some skill at technical writing. This probably will not be the person most familiar with the project. You need to be clear about who is in charge of the actual writing (or which sections) and clarify who they are supposed to work with and why. Consider involving:

- experts in technical areas covered by your project; letters of support enhance your credibility. They can also provide research and help fine-tune the proposal.
- beneficiaries of the project; letters of support from them strengthens your credibility and shows that your project has community support. If beneficiaries cannot understand your proposal, something is wrong. Their input will make your writing clearer and more relevant, which probably means the grant reviewer will also find it easy to understand.
- involve staff or volunteers who will be responsible for carrying out the project to ensure that the proposal is realistic and do-able.

c) Outline the entire proposal in draft form. Assemble all the actors and arrange for a facilitator and recorder to run the meeting. Review the guidelines together. Reach group agreement on the main points that must be addressed and what supporting evidence or information will be needed. Reach group agreement on the action plan - its goals, areas of activity, and specific steps. Rough out the budget.

d) At the end of this meeting, assign tasks needed to complete the proposal:

- collecting information
- writing sections of the proposal
- raising local funds
- acquiring technical assistance
- gaining letters of support or necessary approvals
- fine-tune the time schedule for completion of the proposal so that everyone knows exactly when each of these tasks must occur and so that all parties will have time to review the draft before it is finalized.
- agree on a coordinator for the overall effort whose job it is to make sure the tasks are occurring on schedule.

e) Mail the proposal and wait.

f) Follow-up. If you are not funded, ask the funding source for specific feedback about where your proposal could be improved to make it more competitive. You may want to refine the proposal and re-submit it to the same source at the next deadline. If you are funded, you need to work closely with the source to tie down details for the transfer of monies, bookkeeping requirements, and a variety of implementation details which will now be created by having new resources to manage.



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Proposal Checklist and Evaluation Form

This checklist can assist a grant writing team in the preparation and improvement of a funding proposal. Yes/No answers indicate whether or not an item is included.

The numerical rating (1 is poorest, 5 is best) is to help you weigh the elements the way the funding

source may weigh it.

You can revise the items to match the requirements of the funding source you are preparing the proposal for.

Summary: Clearly and concisely summarizes the request	Yes	No	1-5	Comments
1. Appears at the beginning of the proposal				
2. Identifies the grant applicant				
3. Includes at least one sentence on credibility				
4. Includes at least one sentence about problem				
5. Includes at least one sentence on objectives				
6. Includes at least one sentence on methods of achieving goals				
7. Includes total cost, funds already obtained and amount requested in this proposal				
8. Is brief				
9. Is clear				
10. Is interesting				

Introduction: Describes the applicant and its qualifications for funding (credibility)	Yes	No	1-5	Comments
1. Clearly establishes who is applying for funds				
2. Describes applicant agency purposes and goals				
3. Describes applicant's program and activities				

4. Describes applicant's clients or constituents				
5. Provides evidence of applicant's accomplishments				
6. Offers statistics in support of accomplishments				
7. Offers quotes/endorsements in support of accomplishments				
8. Identifies qualifications in area of activity in which funds are sought (research, training, action steps)				
9. Relates logically to problem statement				
10. Is as brief as possible				
11. Is interesting				
12. Is free of jargon				

Problem Statement/Needs Assessment	Yes	No	1-5	Comments
1. Relates to purposes and goals of applicant agency				
2. Is of reasonable dimensions-not trying to solve world problems				
3. Is supported by statistical evidence				
4. Is supported by statements from authorities				
5. Is stated in terms of client's needs and problems, not the applicant's				
6. Is developed with input from clients and beneficiaries				
7. Makes no unsupported assumptions				
8. Is free of jargon				
9. Is interesting to read				
10. Is as brief as possible				
11. Makes a compelling case				

Program Objectives: Describes the outcomes of the grant in measurable terms	Yes	No	1-5	Comments
1. At least one objective for each problem or need				
2. Objectives are outcomes				
3. Objectives are methods				
4. Describes who will benefit				
5. States the time by which objectives will be accomplished				
6. Objectives are measurable if possible				

Methods: Describes the activities to be conducted to achieve the desired objectives	Yes	No	1-5	Comments
1. Flows naturally from problem and objectives				
2. Clearly describes program activities				
3. States reasons for the selection of activities (other alternatives considered)				
4. Describes sequence of activities				
5. Describes staffing of program				
6. Describes clients and client selection				
7. Presents a reasonable scope of activities that can be conducted within the time and resources of proposal				

Evaluation: A plan for determining degree to which objectives are met and methods are followed	Yes	No	1-5	Comments
1. Presents a plan for evaluating accomplishment of objectives				

2. Presents a plan for evaluating and modifying methods during the course of the activities				
3. Tells who will be doing the evaluation and how they were chosen				
4. Clearly states criteria of success				
5. Describes how data will be gathered				
6. Explains any test instruments or questionnaires to be used				
7. Describes the process of data analysis				
8. Describes any evaluation reports to be produced				

Future Funding: Describes a plan for continuation beyond grant and/or availability of other resources necessary to implement the grant	Yes	No	1-5	Comments
1. Presents a specific plan to obtain future funding if program is to be continued				
2. Describes how maintenance and future program costs will be obtained (if grant involves construction)				
3. Describes how other funds will be obtained if necessary to implement the grant				
4. Has minimal reliance on future grant support				
5. Is accomplished by letters of commitment, if necessary				

Budget clearly delineates costs to be met by the funding source and those provided by other parties	Yes	No	1-5	Comments
1. Tells the same story as the proposal narrative				

2. Is detailed in all aspects				
3. Includes all items asked of the funding source				
4. Includes all items paid for by other sources				
5. Includes all volunteers				
6. Details fringe benefits separate from salaries				
7. Includes all consultants				
8. Separately details all non-personal costs				
9. Includes indirect costs where appropriate				
10. Is sufficient to perform the tasks described in the narrative				

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