

## FACILITATION NOTES FOR LEARNING CIRCLE A:

### HELPING THE COMMUNITY MOBILIZE (2 hours, 45 minutes)

**Session Purpose:**

Help members refine their understanding of capacity building and Back-of-the-Room Facilitation (BOTR) philosophy and strategies.

**By the end of this session, participants will be able to:**

- Dialogue about the mental models they use to inform their community organizing
- Identify and discuss Back-of-the-Room Facilitation (BOTR) techniques they can use in community meetings
- Discuss a delegation process that will help support community capacity building
- Reflect on their current effectiveness as a “coach” and clarify language that can help support the development of others

Time	Steps	Resources/ Materials
	<p><b><u>Room Set-Up:</u></b></p> <ul style="list-style-type: none"> <li>▪ <u>Set the room with:</u> <ul style="list-style-type: none"> <li>⇒ Chairs fanned in rows or a large circle depending on the size of the group and the room</li> <li>⇒ Overhead projector and projection screen</li> <li>⇒ Tables set with copies of LC packet and markers</li> <li>⇒ <b>3 Small prepared tent cards for each table labeled, “Discussion Facilitator,” “Reporter-Recorder,” and “Timekeeper”</b></li> <li>⇒ <b>3 x 5 index cards in 2 different colors (enough for at least one of each color per person)</b></li> </ul> </li> <li>▪ <u>Posted Newsprint:</u> <ul style="list-style-type: none"> <li>⇒ Working agreements from home team session</li> <li>⇒ Parking Lot, Hot Resources</li> </ul> </li> </ul>	<p><b>Role cards and 3 x 5 index cards in 2 colors</b></p>
<b>25 min. total</b>	<b>LEARNING CIRCLE SET-UP</b>	<b>Overhead: Outcomes</b>
2 min.	6. Welcome participants. Clarify focus of this learning circle session.	
12 min.	7. Explain that this session will begin with each person doing a very quick check-in utilizing a “weather report format.” The facilitator will model the “check-in” by taking less than a minute to share the following:	

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10 min.	<ul style="list-style-type: none"> <li>▪ Name</li> <li>▪ Project location and assignment</li> <li>▪ How they are feeling/doing at the moment using weather reporting metaphors, e.g., “partly cloudy with hopes of clearing this afternoon.”</li> </ul> <p>8. Once everyone has completed the check-in, facilitate a discussion with participants about the value of facilitating periodic check-ins as part of the meeting process by a functioning team or work group. Explain that they will be involved during this LC session in a series of activities that will be “debriefed” at their completion and reviewed for the connection to “helping the community mobilize itself.”</p> <p>9. Use the newsprinted session map (you prepared) to walk participants through the conceptual agenda that will be used for this session.</p> <p>10. Complete the set-up of the learning circle—learning objectives, working agreements review, etc.</p> <p>11. Discuss the importance of shared leadership to helping the community mobilize itself. Inform the participants that at each table, there are 3 leadership “role cards.” These cards will be used throughout the session as role markers so that the table group can more intentionally rotate leadership roles. The roles are:</p> <ol style="list-style-type: none"> <li>a. <b>Discussion Facilitator</b></li> <li>b. <b>Reporter-Recorder</b></li> <li>c. <b>Timekeeper</b></li> </ol>	<p><b>NP: Map of agenda</b></p> <p><b>Role cards</b></p>
<b>25 min. total</b>	<b>RESOURCE EXCHANGE</b>	
5 min.	<p>1. Explain that the group will be participating in a “resource exchange” activity that parallels what happens on the floor of the Stock Exchange where resources are traded.</p> <p>2. Engage participants in a fleshing out of what constitutes a resource. (Examples = skills, equipment, knowledge, print resources, people contacts, tools, templates, etc.)</p> <p>3. Ask each participant to prepare 2 cards per the instructions.</p>	<p><b>TR: instructions for preparing Resource Exchange cards</b></p>
5 min.	<p>4. Explain that they will be brought to an open space and invited to use about 10 minutes to share a resource and hopefully get a resource. Tell participants to shout out their “gives” and “gets.”</p> <ul style="list-style-type: none"> <li>▪ Once they find someone who is giving something</li> </ul>	<p><b>RM: Early Starting Points</b></p>

Time	Steps	Resources/ Materials
10 min.	<p>they need, they should give that person their “need card” so that person can follow up.</p> <ul style="list-style-type: none"> <li>▪ Once they find someone who wants what they are offering, they should give that person their “give/share card” so that person can follow up with them.</li> <li>▪ It may work better if both sides exchange information.</li> <li>▪ Explain as in any community, there are people who step up as “connectors.” Invite participants to not only find resources for themselves, but also for others. As they meet people, they will hear about resources that might not match with their needs or interests but will match that of others in the circle. Take the opportunity to connect others to needed resources.</li> </ul> <p>5. Give the participants 10 minutes to resource exchange.</p> <p>6. After 10 minutes, invite participants to return to their tables to discuss as a small group (using the role cards) and then as a large group:</p> <ul style="list-style-type: none"> <li>▪ How did the “resource exchange” go?</li> <li>▪ What worked about the activity.</li> <li>▪ What needed to be “tweaked” so that the activity could be even more successful?</li> <li>▪ How can the structure of an activity help a community mobilize itself?</li> <li>▪ What does equal power have to do with helping a community mobilize itself?</li> <li>▪ What are strategies they have used to help the community see each other as resources to one another?</li> </ul>	
<b>15 min. total</b>	<b>DISCUSSION ABOUT HELPING THE COMMUNITY MOBILIZE ITSELF</b>	
3 min. 5 min.  5 min.	<p>1. <b>Discussion of Benefits.</b> Acknowledge that this is an ongoing discussion. Refer to the PSO and the CBI and the places in those training events where they have already had this discussion. Ask participants to briefly discuss the benefits on multiple levels:</p> <ul style="list-style-type: none"> <li>a. <b>For the organization and community</b></li> <li>b. <b>For the individual Vista member</b></li> </ul> <p><i>(Note: As these are shared, write them on the “map” of the session.)</i></p> <p>2. <b>Discussion of Barriers.</b> Invite participants to briefly reflect on the “barriers,” hurdles, or the different road blocks that exist in the effort to help the community mobilize itself. Explain that the barriers exist on multiple levels as well. Ask them to identify some of the</p>	

Time	Steps	Resources/ Materials
	<p>barriers for each level -</p> <ul style="list-style-type: none"><li>a. <b>For the organization and community</b></li><li>b. <b>For the individual Vista member</b></li></ul> <p>(Note: As these are shared, write them on the "map" of the session.)</p> <p>3. <b>Discussion of Different Frameworks and Principles.</b> Ask members to reflect on what information, frameworks, resources, etc. they are using to inform their efforts to support community mobilization. Invite them to refer to the resources and information in their packet that has been included for their study and guidance. Relate how VISTA members before them have drawn from the experience of different community organizers, organizations, and leaders to inform how to approach the work. Talk about how across union organizing, different labor, civil rights, citizen action movements, organizers hold sets of principles in common. Invite members to pursue their study of how to best help a community mobilize itself.</p> <ul style="list-style-type: none"><li>a. Display the transparency "Community Mobilization &amp; Capacity Building Principles of VISTAs" Ask participants to review them and speak about the different principles that especially resonate with what they are thinking and doing.</li></ul>	<p><b>Packet articles and resources</b></p> <p><b>TR: "Community Mobilization &amp; Capacity Building Principles of VISTAs"</b></p>
<p><b>45 min. total</b></p>	<p><b>EFFECTIVE MEETINGS &amp; BACK-OF-THE-ROOM FACILITATION (BOTR)</b></p>	
<p>10 min.</p>          <p>15 min.</p>	<p>1. <b>Set-up.</b> Explain that they will now be working on strengthening their understanding of not only effective meetings, but of how they can help that happen not from the front of the room, but from the back of the room.</p> <p>2. <b>Table Group Brainstorm.</b> Explain that they will begin by working at their tables to help flesh out a number of things having to do with effective meetings. Remind table teams to make sure to rotate roles again. This part of the activity will be a brainstorm done in a round robin fashion (i.e., each table will have a turn at each topic. Depending on the room and group energy, either the papers could travel, or the table teams.)</p> <ul style="list-style-type: none"><li>a. Each table group will be handed a sheet of poster paper that has a different heading and focus:<ul style="list-style-type: none"><li>▪ <b>Recipe for Effective Meetings</b></li><li>▪ <b>Major Challenges to Team Cohesion</b></li><li>▪ <b>Behaviors that Show Up at Meetings that Are Especially Challenging</b></li></ul></li></ul>	<p>Newsprint with 3 different heading about meetings</p>          <p>Information</p>

Time	Steps	Resources/ Materials
15 min.	<ul style="list-style-type: none"> <li>b. (Round 1 = 5 minutes, Round 2 &amp; 3 = 3 minutes)</li> <li>c. Once the round-robin brainstorming has been completed, have each group re-connect with their original topic and poster.</li> </ul> <p>3. <b>Drafting Working Agreements to Proactively Address Different Meeting Challenges.</b> Prior to reviewing what was generated by everyone, direct each table group to propose 3–4 working agreements that come to mind that directly relate to the ideas generated on their sheets. Explain that well-negotiated and maintained “Working Agreements” can help a group prevent or avert getting into certain problematic situations. It is a strong way to help a group mobilize itself and manage its own processes and priorities.</p> <ul style="list-style-type: none"> <li>a. Give each group 2–3 minutes to highlight what was generated from their topic</li> </ul> <p>4. <b>VISTA Opportunity, Back-of-the Room Facilitation (BOTR), and short scenarios.</b> Facilitate a conversation about their knowledge and experience with BOTR facilitation. Share that for a brief time, they will have an opportunity to witness BOTR in action. Explain that each table group will be asked to develop a short role play showcasing one of the situations that their brainstorm topic generated about meeting challenges. Meanwhile, 2 volunteers from each table will leave the room while the role plays are being planned and will return to play the role of the VISTA members who will model how they can be helpful to a meeting and a group in process without taking center stage.</p> <ul style="list-style-type: none"> <li>a. <b>5 minutes prep</b></li> <li>b. <b>5 minutes on each role play</b></li> <li>c. <b>2 minute discussion by members in the Vista role as to what they attempted to do and how successful they felt doing it</b></li> </ul> <p>5. <b>Summary and Transition.</b> Wrap-up with inviting participants to discuss any “ah-ha” moments for them.</p> <p style="text-align: center;"><i>15 minute break somewhere in the middle</i></p>	

	<p><u>Facilitation Notes:</u></p> <ul style="list-style-type: none"> <li>Remind participants also of the many opportunities that exist to help support effective meetings with behind the scenes planning and follow up.</li> </ul>	
<b>10 min. total</b>	<b>DELEGATING</b>	
3 min.	1. <b>Set-up.</b> Explain that a second 'helping the community mobilize itself' and capacity building strategy is delegation. Invite participants to share a few examples of the delegating they are already doing as part of their service.	<b>TR: Delegation</b>
5 min.	2. <b>Walk-thru of Delegation Process.</b> Explain that while the time is brief on this topic, their packet includes a resource to help them refine their approach to delegation. Use the handout to review key steps in the delegation process.	
	3. <b>Large Group Discussion.</b> Explain that delegation works better, when one has considered the needs of the one who is being delegated to in terms of transition or hand-off planning. Discuss how scaffolding the hand-off is generally a more successful approach. Ask participants to discuss how they will be delegating to another.	
<b>20 min. total</b>	<b>COACHING</b>	
4 min.	1. <b>Set-up.</b> Share that the final capacity building strategy they will discuss and do some skill practice with will be in the area of "coaching." Invite members to share their experiences and knowledge with coaching. Explain that during this remaining activity, they will get some practice holding coaching conversations. Instruct participants to look at the "G.R.O.W." questions. Share that this one suggested framework for structuring a coaching conversation, e.g. <b>goal-&gt;reality-&gt;options-&gt;wrap-up</b> . The flow and questions will be the process they will be practicing.	<b>RM: Coaching</b>
	2. <b>Triad Practice.</b> Direct participants to the coaching information in their packet. Stress that during coaching conversations, it is about relationship building and the skill is in using questions to help your coachee clarify, sort, focus, etc., Good coaches ask good questions, <u>not monopolize the talk time and offer up their answers</u> , <ul style="list-style-type: none"> <li>a. Ask members to form triads preferably with folks they haven't had a chance to talk with yet.</li> <li>b. Explain that there are 3 roles: Person A = Coach, Person B = willing Coachee, Person C = the observer.</li> </ul>	

	<p>c. Once the roles are determined, explain that Person A &amp; B will have 10 minutes for the practice coaching session</p> <p>3. <b>Coaching Reflection.</b> After the practice time, invite the small groups to debrief the session with the Observer, who will share what he or she felt worked with the coaching, as well as what could have been even better. Persons A &amp; B will also share their thoughts about the coaching.</p>	
<b>5 min. total</b>	<b>Session Wrap and Transition to Next Topic</b>	
5 min.	<p>1. Express appreciation for all the sharing during this session. Share the hope that each participant is leaving this learning circle with at least 2 new or strengthened ideas about how they can join with the community in their role as VISTAs to help the community mobilize itself. Close this session by wrapping up the conversation and providing participants a bridge to the next session.</p>	




### Learning Circle “A” – NEWSPRINT TO PREPARE

1. Map ideas with “**Helping the Community Mobilize Itself**” at the center

Off-shoots from the central theme display:

- a. “**WHY?**”
  - Benefits for individuals
  - Benefits for organizations & communities
  - Benefits for the VISTA program
- b. “**BARRIERS?**”
  - For the organizer
  - For the community
- c. “**USING WHAT?**”
  - Legacy of organizing
  - Mental models
  - Other community mobilization efforts
- d. “**HOW?**”
  - BOTR Facilitation
  - Delegation
  - Coaching

**Learning Circle “A” – cards for rotating roles**

<p><b>DISCUSSION FACILITATOR</b></p> 	<p><b>RECORDER- REPORTER</b></p> 	<p><b>TIME KEEPER</b></p> 



## Learning Circle “A” – TRANSPARENCY TO PREPARE

### *Instructions:*

- a. Everyone will prepare 2 resource cards:
- One identifying something you are willing to share/give to a fellow member
  - One identifying something you need/would like to get from a fellow member

<p style="text-align: center;"><b>“GIVE” CARD</b></p> <p style="text-align: center;">A Resource I’d be <u>willing to share/give</u> to a fellow member:</p> <hr/> <hr/> <ul style="list-style-type: none"><li>▪ My Name:</li><li>▪ My E-mail:</li><li>▪ My Contact Information:</li></ul>	<p style="text-align: center;"><b>“GET” CARD</b></p> <p style="text-align: center;">A Resource I <u>need/ would appreciate getting</u> <u>from</u> a fellow member:</p> <hr/> <hr/> <ul style="list-style-type: none"><li>▪ My Name:</li><li>▪ My E-mail:</li><li>▪ My Contact Information:</li></ul>
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