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Introduction
Welcome to Organizing for Change, a workbook for steering groups that are beginning to plan and organize a dialogue-to-change program.

Working to engage the whole community in public dialogue leading to change takes time and dedication. The most successful efforts are led by a diverse group of committed leaders who come together to drive the process. This steering group examines the community situation, looks at ways to make a difference, anticipates the possible outcomes and prepares for them, and plans all the necessary details to create well-facilitated public dialogue. Knowing that meaningful change doesn't happen overnight, it pays to lay a strong foundation, and plan for long-term support.

Dialogue-to-change efforts around the country happen in many ways. What we offer here is a set of agendas and tools: tested principles and practices that can work in all community efforts—large or small, short-term or ongoing.

This approach to public engagement brings all kinds of people to the table, helping them build trust and new relationships, deepen understanding of complex public issues, and generate new ideas. The result is communities that are more inclusive, just, and democratic and, ultimately, better able to solve their own problems.

We encourage you to start where you are and adapt these materials to suit your situation.

Using this Workbook
This workbook lays out information in simple, ready-to-use meeting agendas that include essential activities for planning successful public engagement efforts. Most agendas are based on 90 minutes, but you may vary the time according to your group’s needs. You can use all of the agendas, combine them, or select the ones that address the challenges you are facing.

Designate a person to lead the meetings, or take turns. Make sure someone is taking notes and keeping track of time.

Many organizing groups take three to six months to plan and organize before launching the community dialogues. However, if your timetable is tight, you can speed up the process. Consider combining several key pieces of work into a single meeting.

The agendas build on one another; however, the organizing work often happens in a less linear fashion. Different groups of people may work on different tasks simultaneously.

Let your local situation guide you. Remember, you are trying to balance laying a strong foundation with getting your initiative off the ground.
Overview
It can be helpful to think about dialogue-to-change programs in three phases:

- **Comprehensive community organizing** (team development, planning, recruitment)
- **Dialogue** (sometimes called study circles)
- **Action** (individual, collective, and policy changes)

This simple diagram depicts the overall dialogue-to-change process. Please keep in mind that **communications** and **evaluation** are ongoing.
This workbook covers the first two phases: organizing and dialogue. The action phase will be covered in greater detail in the Organizing for Action Workbook (currently being developed by Everyday Democracy).

This approach to community change—rooted in democratic principles of equality, inclusiveness and collaboration—is based on the following beliefs:

- Most people care about the communities they live in, and want to make them better.
- Complex problems call for many kinds of solutions.
- People from all backgrounds and all segments of society have something to contribute.
- Divisions of race, culture, and class must be addressed for real progress to happen.
- When everybody is included in public life, everyone benefits.
- When all kinds of people develop trust and relationships through face-to-face dialogue, new ideas and approaches emerge.
- When people consider different points of view on a complex issue, they uncover common ground and find better solutions.
- When people have a voice in the public conversation, they are more likely to take part in creating and carrying out ideas for community change.
- The more people who are involved, the bigger the impact.
- Community change is more likely to last and deepen when individual, collective and structural changes are combined.
Glossary

**Action Forum**—a large-group meeting at the end of a series of dialogue circles designed to pool ideas and launch action.

**Action group**—a group of people charged with carrying out a set of action ideas; sometimes called a “task force.”

**Coordinator**—the person (paid or volunteer), at the hub of an organizing effort, who oversees the entire effort.

**Dialogue circle**—a small, diverse group of people (8 to 12) who meet several times to talk about an important public issue. The discussion is guided by a neutral facilitator, and aided by discussion materials; this group is sometimes called a “study circle.”

**Facilitator**—the person who serves as an impartial guide for the conversation in a dialogue circle. Facilitators take part in training to learn facilitation skills.

**Facilitator trainer**—the person who teaches people from the community—youth and adults—to act as dialogue circle facilitators.

**Organizers**—people with primary responsibility for planning, and organizing a dialogue-to-action public engagement effort; sometimes called an “organizing group” or “steering group.”

**Participants**—community people who take part in the public dialogue.

**Pilot dialogue circles**—a small number of dialogue groups aimed at getting people acquainted with the process and building momentum for a larger initiative.

**Racism**—discrimination or prejudice, based on race, resulting in advantages for some groups and disadvantages for others.

**Sample dialogue circle**—a single dialogue for steering group members to experience the process and begin talking about the issue.

**Structural racism**—a system in which history, beliefs, public policies, and institutional practices combine to maintain a racial hierarchy which favors some groups over others.

Use this workbook with *Organizing Community-wide Dialogue for Action and Change*, a comprehensive reference available from Everyday Democracy (formerly the Study Circles Resource Center), or on the web at www.everyday-democracy.org.

Getting Started
(Agendas 1, 2, & 3 + Sample Dialogue Circle)

Work to do in this stage:
- Form a small, diverse steering group.
- Explore public engagement as a strategy to address a community issue.
- Experience the dialogue (sample dialogue circle).

This phase can be condensed into one or two meetings, including the sample dialogue circle.
Agenda 1 (90 minutes)

Initial conversation

*The purpose of this meeting is to begin talking about a shared community concern.*

Invite a small group of people who share a concern about a community issue to an informal meeting.

Welcome and introductions (15 minutes)

- Have everyone introduce themselves and talk about their connection to the community.

What brings us together? (60 minutes)

As a group, consider the following questions. It’s a good idea to record the major ideas.

- What is the situation in our community that has brought us to this meeting?
- Why are you concerned about this issue?
- How has this issue affected you or your family?
- What is the impact on different racial groups in our community?
- Do you think this issue is compelling to a large number of people? How would we describe it?
- What has been done to address the issue already?
- What would it mean to engage the public in addressing this issue? How might public dialogue help?
- What do we hope would change in the community as a result of addressing this issue through public dialogue?

Summarizing (5 minutes)

Spend a few minutes reviewing the major themes or ideas that came up.

Wrap-up and next steps (10 minutes)

Close the meeting by asking:

- Would we like to continue this conversation?
- Keeping the diversity of our community in mind, who should we invite to the next meeting?
  
  Name __________________
  
  Who will invite __________________
- Is there “homework” we need to do before the next meeting?

Thank everyone for attending, and adjourn.

Meeting summary:

We decided:

Comments:

Task ___________________ Who _______________ By when ___________________

Next meeting (date, time & place):
Agenda 2 (90-120 minutes)
Continuing our conversation
and
Planning for sample dialogue circle

The purpose of this meeting is to expand the discussion we began in our first meeting and to plan and schedule a sample dialogue

Welcome and introductions (10-15 minutes)
Welcome everyone and have people introduce themselves. Make sure new people have time to share something about themselves and how they feel connected to this issue.

Recap the conversation from last time, highlighting any themes. (40-60 minutes)
Invite people to continue the conversation.

Make plans to hold a sample dialogue circle(s). (30-35 minutes)
Remember a typical circle has 8-12 people, and one or two facilitators.
- What discussion materials will we use? (See www.everyday-democracy.org for resources.)
- Who will facilitate the discussion? (Find someone who can serve as a neutral facilitator. See A Guide for Training Public Dialogue Facilitators for tips and guidelines.)
- How much time will we set aside for this activity? When and where will this happen? Some groups decide to abbreviate the dialogue, using one or two sessions, while others set aside time to hold the full discussion. The important thing is to experience at least some of the true dialogue.
- Who is missing from the group? For example, have we included all racial groups in our community, those affected by the issue, people with different perspectives on the issue, etc.

Wrap-up and next steps (10 minutes)
Summarize any decisions from the meeting. Review tasks to do before the sample dialogue circle takes place. Thank everyone for attending, and adjourn.

Meeting summary:
We decided:

Comments:

Task __________________________ Who ________________ By when __________________________

Next meeting (date, time & place):
Hold a sample dialogue circle

It is important for group members to have a real dialogue circle experience. With the guidance of a neutral facilitator, participants should begin with Session One in one of Everyday Democracy’s discussion guides, set ground rules, and follow the structure of the discussion guide.

Make sure everyone is fully engaged in the experience, and delay any discussion about making this happen in the community until after the circle is completed. Make every effort to involve members of the core group in this activity, and be sure the group is as diverse as possible.

This experience will:
- build relationships and trust.
- familiarize people with the process.
- deepen understanding of the issue.

If the sample dialogue circle is abbreviated, combine the dialogue with the debriefing in one meeting (Agenda 3).

As you prepare for the next meeting, review pages 19-26 in Organizing Community-wide Dialogue for Action and Change.
Agenda 3 (90 minutes)
Dialogue debrief and discussion: Would this work in our community?

The purpose of today’s meeting is to debrief the dialogue and talk about how this might work in the larger community.

Welcome and review agenda (5 minutes)
Welcome everyone and do quick introductions.

As a group, talk about the sample dialogue. (30 minutes)
- What stood out for you?
- What did you notice about the process?
- Did your sense of the issue change, as a result of the dialogue? If so, in what ways?

Next, talk about the potential for a community dialogue-to-change process. (45 minutes)
- What would it take to involve large numbers of community people in this kind of dialogue?
- What are we trying to accomplish? Do we have broad goals in mind?
- Are we clear about how to focus the discussion? Do we all agree on how we describe or name “the issue”?
- Are there other groups already working on this issue? How should we reach out to them?
- What kinds of resources do we need? (organizational support, staffing, etc.)
- Who should lead this effort? Who else should we get involved? Should we hold additional meetings to recruit more people into our organizing group, especially those from different racial groups who care about this issue?
- What is the geographic area we hope to impact? (neighborhood, town, school district, etc.)
- What is the right timing for this effort? Are there other things happening that would have an impact on the timing of this initiative?

To help focus and deepen this discussion, refer to Appendix A. If you run out of time, ask everyone to fill out the form before the next meeting, and review it, then, as a group.

Wrap-up and next steps (10 minutes)
Summarize any decisions from the meeting. Review tasks to do before the next meeting. Thank everyone for attending, and adjourn.

Meeting summary:
We decided:
Comments:
Task ____________________ Who ____________ By when __________________

Next meeting (date, time & place):
Building the Team
(Agendas 4, 5, 6, & 7)

Work to do in this stage:
- Firm up the organizing group.
- Learn more about the community and the issue.
- Set goals (short- and long-term).
- Talk about what kinds of change are possible.
- Start planning for action.
- Settle on discussion materials.
- Figure out how to work together as a team.
Agenda 4 (90 minutes)
Early planning

*The purpose of today’s meeting is to begin planning the community effort.*

**Welcome and review agenda (5 minutes)**
Welcome everyone and do quick introductions. Make sure new people have the chance to introduce themselves and say something about what has drawn them to this project.

**Are we ready to help our community work for change? (15 minutes)**
As a group, review Appendix A. Talk about strengths and weaknesses in the community. How can we address them? Capture these ideas in writing.

**Hopes, early goals, and concerns (30 minutes)**
Begin by asking everyone to answer the following questions: “What do you hope will be different (for the neighborhood, our schools, the community, etc.) as a result of the community conversations? What are your hopes for this initiative?”

Give people a few minutes to write their answers on sticky notes, one idea per note. Then, ask them to read their answers aloud, while the notes are collected and put up on a wall or easel labeled “Hopes.” Put similar ideas together. Circle any words that appear more than once. Identify any themes.

Keeping these ideas and themes in mind, talk about the general goals of the program. Remember that goals can be focused on impact: What are we trying to accomplish? What will change? And process: What strategies will we use to get there? (See page 32 in Organizing Community-wide Dialogue for Action and Change.)

As background, remind the group that this kind of activity is often undertaken to:
- make sure citizens are informed and connected.
- resolve conflict or deep divisions in the community.
- involve the public in an important decision or plan.
- generate innovative solutions to complex community problems.
- reach out to all kinds of people, especially those who are often left out.
- identify and develop new leaders and activists.

Referring back to the “hopes” list, complete the following list of potential program goals:
“This we are organizing community-wide conversations:
- to ____________.
- to ____________.
- to ____________.

Be sure to talk about how many people you hope to involve and the diversity you hope to include.

Next, ask everyone to do the same exercise, answering the following questions: “What are some of your concerns as we move forward? What barriers do you see?”
Again, write one idea per note. Ask people to read their answers aloud, as notes are collected and placed on a sheet marked “Concerns/Barriers.” Put similar ideas together. Ask the group to think about how to address the concerns, and include any thoughts from the earlier conversations. Post the goals and concerns at all meetings. Refer to them occasionally to check progress.

**Community Assets Brainstorm (15 minutes)**

Ask the group to answer the following question: “What kinds of assets do we have in this community that could help with this project?”—Anything you can think of: people, expertise, organizations, networks, buildings, physical surroundings, talents, funding, etc.

Capture the ideas on a flipchart. Don’t stop to talk about the ideas as they come; just invite everyone to participate. After the brainstorm is complete, put the list of community assets beside the program goals. Ask the group:

- What connections do we see between our assets and the program goals? What do we already have available that can help us be successful?

Be sure you note any connections and keep them in mind as you do further planning.

**Make plans to learn more about the community and the issue. (20 minutes)**

To have the greatest chance of success, we need to educate ourselves more about our community, and the issue(s) we are trying to address. What are some resources or information that could help us?

You can use community information, such as:
- demographics (race, age, ethnicity) and other census data;
- economic situation (business climate, income levels);
- housing patterns;
- crime rates;
- schools, hospitals, social services and other infrastructure;
- signs of growth/signs of decline;
- leadership and decision making. (How do things get done?)

You can include information specific to the issue, such as:
- institutions connected to this issue, including how they operate; how responsibility is distributed, how decisions are made; and who leads them;
- information about populations affected by the issue; trends.

What else would we like to know?

Remember to connect the community information from **Appendix A** to the issue-related information you are gathering. This will provide a fuller picture of the situation.

Ask for volunteers to research and gather the information identified by the group. Make sure you write down the assignments. Talk about where you might locate this information. Possible sources include public and university libraries, community organizations, state agencies or departments, state and local web sites. Plan to bring the material to the next meeting so that the whole group can explore it together.
**Wrap-up and next steps (5 minutes)**
Summarize any decisions from the meeting. Review tasks to do before the next meeting. Thank everyone for attending, and adjourn.

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Next meeting (date, time & place):
Agenda 5 (90 minutes)
Community mapping and issue analysis

The purpose of today’s meeting is to learn more about our community and the issue we are hoping to address, so that we are better able to support citizen dialogue and action.

Welcome and review agenda (5 minutes)
Welcome everyone and do quick introductions. We will be using the information we’ve been collecting about the community and the issue. Post information from earlier meetings to refer to, as necessary.

Creating a community map (30 minutes)
Using a large piece of paper and colored markers, invite the group to draw a map of the community. Include major landmarks, roads, residential and business areas, parks, etc. Use the community information collected by the group to fill in the map with as much detail as possible. Be creative. Use colored paper, symbols and other materials to indicate different kinds of information. Next, refer to the list of community “assets” from the last meeting and add them to the map.

Analyzing the issue (45 minutes)
Invite people to share the information they have gathered about the issue. Record the main points on a flipchart. You may want to create another “map” by drawing a picture of the issue, the institutions involved, the key players, etc. Once you have shared the information, use these questions to guide further conversation:

- Is this a new problem or has it been long-standing?
- What has been done to address this situation in the past? What happened?
- What institutions or organizations are involved?
- Who are the key players and where do they stand on the issue?
- What kinds of influence or decision-making power do they have?
- How does racism show up in this issue?
- Who is most affected by this issue?
- Where should we focus our energy to make the biggest impact?
- Who else should be involved, so that we can make progress? How will we reach them?
- Are we ready to go forward, or is there more information we need to gather?

Wrap-up and next steps (10 minutes)
Review the main themes of today’s meeting, and any decisions that were made. Review tasks to do before the next meeting. (Be sure to read Appendix B and Appendix C.) Thank everyone for attending, and adjourn.

Meeting summary:
We decided:

Comments:

Task ___________________ Who _______________ By when ___________________

Next meeting (date, time & place):
**Agenda 6 (120 minutes)**

**Program goals and early action planning**

*The purpose of today’s meeting is to firm up our program goals and begin thinking about where the dialogue will lead us.*

**Welcome and review agenda (5 minutes)**
Welcome everyone and do quick introductions. Post both the Community Map and program goals where everyone can see them. *Appendix B* and *Appendix C* provide background for today’s discussion.

**Taking another look: Why are we doing this? (45 minutes)**
Spend a few minutes thinking back over the earlier activities. Review flip chart notes. Now, revisit the program goals. Use these questions to guide the conversation:

- What kind of change are we hoping for?
- Are there any additions or corrections to the goals as they are currently written?
- What are our priorities?
- Are some things easier to do and more likely to yield quick results?
- Which goals are short-term and which are long-term?

Once there is agreement on 2 to 4 goals, divide people into smaller groups and assign one goal per group. Ask each group to spend a few minutes brainstorming possible outcomes related to this goal. Answer the question: “What kinds of changes might occur in the community if we were to make progress on this goal? What would be different?” Share ideas with the whole group.

Then, as a whole group, go through the goals one at a time and answer the following questions:

- “Given our goal of ___________,
  - are there people or organizations we should add to our steering group? (See pages 19-26 in *Organizing Community-wide Dialogue for Action and Change.*)
  - are there specific people we should invite to participate in the dialogues?
  - are there people or organizations that might be able to help us implement action ideas?
  - are there resources we should be looking for now to help implement action later?

Take careful notes, since this discussion is key to planning for recruiting allies, a steering group, dialogue participants, and facilitators.

Then talk about possible barriers:

- “Given our goal of ___________,
  - what challenges do we see?
  - who are the key people we need to get on board? Are they accessible? How will we reach them?
  - what else can we do to improve our chances of success?

Note any ideas or strategies in this discussion, and decide what steps to take.
The impact of racism (40 minutes)
Do different groups in the community see “the problem” differently? Divide the group by race and spend a few minutes answering these questions:
- How do I or people like me describe this issue?
- Has this issue touched me personally?
- What are some possible solutions?
- What kinds of changes would I like to see?

Reassemble as a large group and have each group report out. Then ask:
- Where do we agree?
- What do we see differently?
- Do we need to restate our issue, or adjust our goals?
- What else do we need to learn about how racism is impacting the situation?

NOTE: The steering group may decide to explore the impact of racism in more depth. Everyday Democracy provides training on structural racism and how it’s tied to issues that affect many American communities. (See www.everyday-democracy.org for more information.)

Measuring our progress (20 minutes)
Once the goals of the program are set, it is time to talk about documentation and evaluation. Refer to pages 63-81 in Organizing Community-wide Dialogue for Action and Change to provide a backdrop for your conversation.

Form a committee to oversee the evaluation process, and ask them to come back to the steering group with recommendations for how to proceed.

Wrap-up and next steps (10 minutes)
Review the main themes of today’s meeting, and any decisions. Review tasks to do before the next meeting. Thank everyone for attending and adjourn.

Meeting summary:
We decided:

Comments:

Task __________________________ Who ________________ By when __________________________

Next meeting (date, time & place):

NOTE: By the time you have reached this point in the planning, pause and pat yourselves on the back. Good work! Make sure you save some time for personal sharing or include a meal as part of your meetings.
Building relationships among members of the organizing group is essential to long term success. In your haste to "get the work done," don’t forget the larger purpose—you are laying the groundwork for a different kind of community, where there is room for all voices, and problems will be addressed in new and creative ways.
Agenda 7 (90 minutes)
Steering group: Structure and function

The purpose of today’s meeting is to spell out how we are working together, with particular attention to race and other differences. We will also talk about staffing for the dialogue-to-change project.

Welcome and review agenda (5 minutes)
Welcome everyone and do a quick check-in.

Use Appendix D and Appendix E to help the discussion. Also, see pages 19-23 in Organizing Community-wide Dialogue for Action and Change.

Progress to date (15 minutes)
Start by reviewing how things have been getting done. It might be helpful to diagram your structure on a flipchart.
- How are we currently operating—one large group, multiple groups, etc.?
- What’s been working well?
- Have there been any problems or difficulties? How have they been addressed?
- Are there racial dynamics at play?
- Are we clear about roles and responsibilities?

Group discussion (60 minutes)
Invite the group to talk about:

Membership
- Who is currently attending our meetings and carrying out the work?
- Is there a steering group that is meeting regularly?
- Are we intentional about reaching out and including all racial groups?
- Are there others who want to be involved, but to a lesser extent?
- How can we keep everyone informed and involved?

Decision making
- How have we made decisions so far? General agreement? Consensus? Voting? Or a combination?
- How is this working?
- Are all voices being heard?
- Do we need to change anything?

Leadership and staffing
- Who has been taking the lead so far?
- Is this working well, or do we need to modify anything?
- How are meetings run? How are we doing with minutes, follow up, etc.?
- Are we attentive to racial and cultural differences as we approach our meetings (location, time of day, leadership style, relationship building)?
- How will we staff this effort? Volunteer, paid, or a combination? Can one of our member organizations cover the staffing? Do we need to raise funds for this position?
Communication—External
- What are our key messages?
  - What are we trying to do?
  - Who is our audience?
  - What do we want the audience to do?
- Are we thinking strategically about communications in every phase of the work?
- Who will take the lead on this?

See Appendix F for an exercise to develop an overall communications strategy. Be sure to set aside time to do this work!

Communication—Internal
- How successful have we been at keeping everyone informed?
- What methods have worked the best?
- Do we need to change anything?
- How can we make sure everyone gets the proper credit?

Wrap-up and next steps (10 minutes)
Review the main themes of today’s meeting, and any decisions that were made. Review tasks to do before the next meeting. Thank everyone for attending, and adjourn.

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Next meeting (date, time & place):
Sharing the Work
(Agenda 8)

Work to do in this stage:
- Identify organizing tasks.
- Develop work groups, duties, and timetables.
- Coordinate efforts.
- Prepare for launch.
Agenda 8 (90 minutes)
Work groups and tasks

The purpose of this meeting is to set up work groups/committees to carry out the organizing tasks.

Welcome and review agenda (5 minutes)
Welcome everyone and do a quick check-in.

Setting up work groups (75 minutes)
To get ready to launch the round of dialogues, there are a number of specific tasks to do. The following list covers the major areas. Identify people to work on each task, and designate a contact person to keep track of the progress. Some tasks may be combined. See pages 37-114 in Organizing Community-wide Dialogue for Action and Change (OCDAC) for information on a variety of organizing tasks. Refer each work group to the relevant pages to help them do their work. Specific pages in OCDAC are referenced below.

- Discussion materials; fact sheets (pages 13-18); See Appendix G.
- Staffing/coordinator (pages 27-30)
- Communications (pages 39-54); See Appendix F.
- Funding (pages 55-62); See Appendix H.
- Action planning, including Action Forum, long term support, institutional connections (pages 89-98)
- Participant recruitment (pages 83-88)
- Evaluation and documentation (pages 63-81)
- Kickoff (pages 107-110)
- Sites and other logistics (pages 111-114)

Assign people to work groups and allow time for them to meet. Make sure everyone exchanges contact information and sets a date for their first meeting. In some cases, tasks may be done via e-mail. Group members can decide what’s best for them. Revisit the overall timetable of the project to give people a sense of how much time they have to complete their work.

Wrap-up and next steps (10 minutes)
NOTE: It’s essential to keep track of how the work is coming along. Set a date for a meeting for everyone to coordinate their efforts and check on last-minute details as you near the start of the dialogue circles. Thank everyone for attending, and adjourn.

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Hold a Round of Dialogue

Work to do during this phase:

- Recruit participants.
- Launch publicity and work with media.
- Train facilitators and recorders.
- Handle logistics.
- Implement documentation and evaluation.
- Hold kickoff and begin dialogues.
- Activate an Action Oversight Committee to plan the Action Forum and prepare for the action phase of work.

During this time, the steering group’s main role is to oversee and coordinate the details necessary for launching the dialogue circles.

Everyone (steering group, staff, and volunteers) is involved in recruiting participants for the dialogue circles. It is essential, however, to have a small group of people thinking strategically about how to do this; their task is to develop a plan and make assignments. (See pages 83-88 in *Organizing Community-wide Dialogue for Action and Change*). Refer back to notes identifying potential participants who are linked directly to program goals and outcomes.

Recruiting participants, training facilitators, securing sites and handling logistics, and setting up the program evaluation are among the most important activities in the final weeks before the start of the dialogue circles. Steering group members should be working with media to raise awareness of the project, and the Action Oversight Committee should begin its work.
Facilitation
People responsible for the facilitator preparation will:
• identify and recruit a diverse pool of potential facilitators and recorders, who are representative of the community.
• identify and hire a trainer. (Ask Everyday Democracy for help on this.)
• hold a two-day facilitator training. (See A Guide for Training Public Dialogue Facilitators.)
• provide support for facilitators: check-in meetings or a telephone “hot-line.”

Recording and evaluation
People responsible for program evaluation will:
• decide how to collect information from dialogue circles (pages 63-74 in Organizing Community-wide Dialogue for Action and Change).
• develop a recording form and/or other methods for gathering information.
• train recorders.

Hold a kickoff and begin a round of dialogue circles!
Connecting the Dialogue to Action and Change
(Agenda 9)

Work to do during this phase:
- Action Oversight Committee monitors and supports action efforts.
- Document/evaluate the outcomes.
- Tell the story to the broader community.
- Revisit program goals; set goals for next phase.

For public dialogue to lead to change, support for action is essential. Sometimes, a few key members of the steering group form an Action Oversight Committee, invite others to join them, and take on the action planning and support. The action work can also be supported by different people or organizations than those who organized and launched the dialogue.

The Action Oversight Committee should be well into the action planning by the time the dialogues are underway. Once the conversations begin, consult facilitators and collect notes from the circles to get a sense of how the dialogues are progressing and what kinds of action ideas are starting to emerge. Refer to pages 89-98 in Organizing Community-wide Dialogue for Action and Change. Have the Sample Action Forum agenda on page 98 available as a handout or on a flipchart. Also, see Appendix B.

It’s really important to keep everybody informed about progress. Some groups hold community meetings, occasionally, to report on action efforts and offer continuing support. Program evaluation should be ongoing, since organizers will want to document outcomes and changes that occur as a result of the dialogue circles.
Agenda 9 (90 minutes)
Planning Action Forum and support for action groups

The purpose of this meeting is to finalize plans for the Action Forum, and address other considerations for supporting the action efforts as they unfold.

Welcome and review agenda (5 minutes)
Welcome everyone and do a quick check-in.

Report from dialogue circles (15 minutes)
Ask the coordinator or others who have been meeting with facilitators to report on how the circles are going.
- Are circles diverse and well attended?
- How are the discussion materials working?
- What kinds of action ideas are beginning to emerge?
- Do we anticipate outcomes that are:
  - about changes in individuals’ attitudes, beliefs and behaviors?
  - about collective action, such as new projects, collaborations, connections to existing community efforts or institutional changes?
  - aimed at affecting policy?
- How will we collect and categorize ideas before the Action Forum?

Planning the Action Forum (45 minutes)
Before you have this conversation, please see Appendix I.

Using the Sample Agenda as a starting point, talk about how to structure the event. (See page 98 in Organizing Community-wide Dialogue for Action and Change.) Be attentive to racial dynamics as you plan. (See Appendix E.)
- How can we ensure the event will be welcoming to all kinds of people?
- Are we sharing leadership and decision making across racial groups?
- Are there particular individuals or organizations to invite, because they will be involved in implementing the action ideas?
- Who will host the event?
- How will we summarize the work of the circles?
- Have we lined up people to convene the action groups and get them started?
- Can we build in time during the Forum for action groups to meet briefly?
- Will we be writing a report summarizing the circles and action plans? How will we distribute it?
- What can we tell people about our future plans?
Long-term action support (20 minutes)
As a whole group, talk about the plans for carrying the action work forward. Here are some things to talk about:

- Do we have an Action Oversight Committee in place to coordinate the action efforts? How will these groups stay connected to the original organizing group? See diagram in Appendix J.
- Do we have leaders (experienced “process facilitators”) to help action groups get started, find information, and access a range of resources? (See Appendix K.)
- How will we track outcomes and results?
- How can we make sure we stay focused on our goals?
- Do we need to look for new or additional funding?
- Do we have a communications plan ready to keep the community informed about our progress?

Wrap-up and next steps (5 minutes)
Decide how the steering group will stay in touch as the action phase begins. Set a meeting date to take stock, after the project is well into the action phase. Thank everyone for attending, and adjourn.

Meeting summary:
We decided:

Comments:

Task ____________________ Who ________________ By when ____________________

Next meeting (date, time & place):
Ongoing Public Engagement—The Long View  
(Agenda 10)

**Things to think about for the long term:**
- How can we make sure that our community continues to solve problems democratically?
- How will we measure our success?

There are places around the country where community leaders and citizens have learned the benefits of engaging the public in large numbers to address a range of community concerns. In some places, thousands of people have participated in dialogue-to-change programs over a number of years. Organizers report that, over time, new dynamics and ideas emerge around complex and difficult issues. Communities really begin to “feel” different—more connected, more inclusive, and better able to solve their own problems.

Creating that kind of capacity depends on:
- developing leaders—both formal and informal—who appreciate this approach.
- knowing how to plan, organize, and recruit participants.
- talking about public issues in ways that invite all kinds of people into productive dialogue.
- having skilled facilitators to guide the conversations.
- committing to follow-through and action implementation.
- committing to work across racial and economic divides.
- taking time to measure progress and set new goals.
- keeping the broader community informed.

See pages 119-122 in *Organizing Community-wide Dialogue for Action and Change.*
Agenda 10: (3 hours)
Taking stock and planning for the future

The purpose of today’s meeting is to reflect on our work so far, hear about current activity, celebrate our successes, and plan the next stage of our work.

It’s important to pause, reflect, and start planning for the future. Organizing groups committed to ongoing public engagement and dialogue-to-change efforts should take time, at least once a year, for an in-depth meeting. Many communities organize circles in the fall or early winter, support action in the winter and spring, and use the summer for assessing progress and planning for the coming year. Aim for a more relaxed kind of event, with time for a meal, sharing and reflection, and careful strategizing for the future. This can be a great time to add new people to the organizing group.

Welcome and review agenda (30 minutes)
Welcome everyone and spend some time checking in.

• What’s new?
• Have there been any big changes in your life since we were together?
• As you have reflected on the dialogue-to-change experience, are there any particular insights you’d like to share?

Review agenda. Post the program goals where everyone can see them.

Looking back (45 minutes)
Think back to the planning, organizing, dialogue, and action phases of the work. Using a flip chart to capture the main ideas, answer the following questions:

• As you recall the dialogue-to-change work of the last year, what stands out?
• What did we do well?
• How effective were we at working equitably across racial groups?
• What were our biggest successes?
• How could we improve?

Current activity (30 minutes)
Summarize the current situation, asking for input from staff or other volunteers.

• What is the status of the action efforts? (personal, collective, and policy level)
• Are other things happening?
• How are we tracking the activity?
• How is the Action Oversight Committee working?
• Are there action groups at work right now?
• What particular challenges are they facing? Is there anything we can do to help them?
• Did the dialogue-to-change work affect policies in any way? How?
• What can we point to as significant outcomes?

Celebrate! (15 minutes or more)
As a group, take time to acknowledge what has been accomplished. Single out people for special recognition and thank them for their work. Share a meal or have dessert! Take some pictures! Present a gift! Make space for people to be thanked and heard.
Looking ahead (50 minutes or more)
As a group, look to the future. Answer these questions:
- Given our history, where do we go from here?
- What has changed in the community since we began our work? Give some examples.
- Will we organize another round of dialogue circles, consider other approaches, or combine several different strategies? (See Appendix C.)
- What might be the goals for the next stage of work? Should we consider a more targeted approach, building on what we heard from the dialogues?
- Will the topic of the discussion change?

And some questions about the steering group:
- How are we doing?
- Are we working in an equitable way, especially with regard to race and other differences?
- What about funding and staffing?
- Should we create formal partnerships with other organizations in the community?
- Do we need to look for an institutional home?

Wrap-up and next steps (10 minutes)
Summarize the major themes from the meeting, and talk about next steps. Do we need to continue this conversation? Set next meeting date. Thank everyone for attending, and adjourn.

Meeting summary:
We decided:
Comments:
Task ____________________ Who _____________ By when ________________

Next meeting (date, time & place):
Appendices

A. Are we ready to help our community work for change?
B. What results come from dialogue-to-change programs?
C. Organizing the community: Different approaches, different processes
D. Focusing on racial equity as we work
E. Racial dynamics to watch for
F. Creating a communication plan
G. How to create a fact sheet
H. Thinking about fund raising
I. Structuring the Action Forum to meet program goals
J. Action Oversight Committee: A diagram
K. Helping action groups succeed
Appendix A
Are we ready to help our community work for change?

Use the following list to assess your community’s readiness and capacity for real change. Identify places that need further work, as you move ahead to address community goals. This report card can be used by the organizing group, at the outset of a public engagement initiative, and also when you’re thinking about how to implement action plans.

<table>
<thead>
<tr>
<th>1.</th>
<th>COMMUNITY</th>
<th>How are we doing?</th>
</tr>
</thead>
</table>
| A. | History of cooperation  
A history of cooperation exists in the community, suggesting potential for the future. | ○ Weak  
○ Moderate  
○ Strong |
| B. | Strong leadership  
The organizing and action groups include formal and informal community leaders who are highly regarded. | ○ Weak  
○ Moderate  
○ Strong |
| C. | Community readiness: Favorable political/social/cultural climate  
Political leaders, opinion makers, persons who control resources, and the general public support—or do not oppose—the goals of the dialogue-to-action work. Many people are dissatisfied with the status quo and are looking for change. | ○ Weak  
○ Moderate  
○ Strong |
| D. | Capable organizers  
The organizing group and action teams have a realistic understanding of the challenges and time required to do the work. There is a good match between the scope of the project and the group’s resources. | ○ Weak  
○ Moderate  
○ Strong |

<table>
<thead>
<tr>
<th>2.</th>
<th>LEADERSHIP</th>
<th>How are we doing?</th>
</tr>
</thead>
</table>
| A. | Diversity  
Formal and informal leaders reflect the diversity of the community, including those who are most affected by the issue. | ○ Weak  
○ Moderate  
○ Strong |
| B. | Leadership capacity  
Leaders have sufficient skills in (a) project management (b) meeting facilitation, (c) consensus building and conflict resolution, (d) addressing the dynamics of privilege and power imbalances. | ○ Weak  
○ Moderate  
○ Strong |
<table>
<thead>
<tr>
<th>C. Mutual respect, understanding, and trust</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members of the organizing and action groups understand and respect each other and their organizations—how they operate, their cultural norms and values, their expectations and limitations.</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>D. Commitment to address issues of structural racism</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members of the organizing group work on their own issues of structural racism as they address it in the community.</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>E. Collaboration</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizing and action group members believe working together will lead to results they might not be able to obtain individually.</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>F. Ability to compromise</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizing and action group members are able to compromise, despite the fact that some decisions may not please everyone.</td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>3. PROCESS/STRUCTURE</th>
<th>How are we doing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. People have a stake in process and outcome.</td>
<td>Weak</td>
</tr>
<tr>
<td>Members of committees and action groups support the way their group functions and care about the results.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B. Consensus is the primary decision-making method.</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members work hard to reach consensus.</td>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>C. Flexibility/Adaptability</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>The groups are open to various ways of organizing and accomplishing their work. They can adapt to changing conditions.</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>D. Clear roles and responsibilities</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>The organizing and action group members understand their roles and responsibilities, and how they relate to the overall public engagement effort.</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>E. Moving to action</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Action Oversight Committee plans for the action emerging from the dialogue, and works to put resources in place.</td>
<td></td>
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</table>
### Clear process design
There is a process for designing a road map for creating change. Benchmarks identify successes along the way. Goals may change, as the community situation shifts.

<table>
<thead>
<tr>
<th>4. COMMUNICATION</th>
<th>How are we doing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Clarity and frequency</td>
<td></td>
</tr>
<tr>
<td>Group members talk often, update one another, discuss issues openly, and convey necessary information to one another and to people outside the group.</td>
<td></td>
</tr>
<tr>
<td>○ Weak</td>
<td></td>
</tr>
<tr>
<td>○ Moderate</td>
<td></td>
</tr>
<tr>
<td>○ Strong</td>
<td></td>
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</table>

| B. Informal and formal links |
| Communication happens on paper. Members also talk and establish good working relationships, resulting in an informed and cohesive group. |
| ○ Weak |
| ○ Moderate |
| ○ Strong |

| C. Overall planning |
| A plan is in place to promote the dialogue-to-change effort and tell stories to the community about outcomes. |
| ○ Weak |
| ○ Moderate |
| ○ Strong |

### Purpose

<table>
<thead>
<tr>
<th>5. PURPOSE</th>
<th>How are we doing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Concrete, attainable goals and objectives</td>
<td></td>
</tr>
<tr>
<td>Goals and objectives of the group are clear and realistic.</td>
<td></td>
</tr>
<tr>
<td>○ Weak</td>
<td></td>
</tr>
<tr>
<td>○ Moderate</td>
<td></td>
</tr>
<tr>
<td>○ Strong</td>
<td></td>
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</tbody>
</table>

| B. Shared vision and expectations |
| Partners have the same vision, and are clear about mission, objectives, and strategy. The vision may exist at the outset, or the partners may develop a vision as they work together. |
| ○ Weak |
| ○ Moderate |
| ○ Strong |

| C. Unique purpose |
| The goals of the group connect the member organizations. |
| ○ Weak |
| ○ Moderate |
| ○ Strong |

### Resources

<table>
<thead>
<tr>
<th>6. RESOURCES</th>
<th>How are we doing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Sufficient funds</td>
<td></td>
</tr>
<tr>
<td>The group has adequate funds to support its operations which may include staffing.</td>
<td></td>
</tr>
<tr>
<td>○ Weak</td>
<td></td>
</tr>
<tr>
<td>○ Moderate</td>
<td></td>
</tr>
<tr>
<td>○ Strong</td>
<td></td>
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</tbody>
</table>

| B. Skilled convener |
| The person(s) who convenes the steering group has organizing and interpersonal skills, and carries out the role with fairness. Because of these qualities, the convener is respected by the partners. |
| ○ Weak |
| ○ Moderate |
| ○ Strong |
## Appendix B
### What results come from dialogue-to-change programs?

<table>
<thead>
<tr>
<th>Kind of change</th>
<th>How does it happen?</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Changes in individual behavior and attitudes</strong></td>
<td>Participants develop a deeper understanding of the issues and of each other, and see that others in the community care about making a difference.</td>
<td>A participant in a community-wide program on racism decides never again to let racist remarks go by without a comment. After participating in dialogue circles on violence, senior citizens begin to volunteer at the Boys and Girls Club.</td>
</tr>
<tr>
<td><strong>New relationships and networks</strong></td>
<td>Trust and understanding develop between participants in the dialogue.</td>
<td>Following dialogue circles on community-police relationships, young people and police officers in the neighborhood set up regular weekly meetings.</td>
</tr>
<tr>
<td><strong>New working collaborations</strong></td>
<td>Individuals and organizations develop new relationships and new ideas for solutions.</td>
<td>After dialogue circles on neighborhood issues, residents, police officers, and mental health advocates create an emergency team to help mentally ill people who wander the streets.</td>
</tr>
<tr>
<td><strong>Changes in public policy</strong></td>
<td>Public officials play a part in organizing the dialogue circles, and make a commitment to work with citizens in implementing the outcomes. OR Public officials take part in the organizing and dialogue process. Through their participation, they gain new insights that have an impact on their policymaking. OR Information from the dialogue circles is collected and reported to people making decisions or developing policy.</td>
<td>After a round of dialogue circles on education, a diverse group of participants develops a plan for the county schools to close the achievement gap between the races. The school board—a leading organizer of the circles—decides to fund the plan and work with the community in implementing it. After participating in dialogue circles, a school superintendent creates new policies to boost parental involvement in the district's schools. A report from the dialogue circles in a large community examining growth and sprawl is presented to the planning board. The planning board, in turn, uses this information to help shape its ten-year comprehensive plan.</td>
</tr>
<tr>
<td><strong>Institutional changes</strong></td>
<td>Leaders or members of an institution participate in the dialogue circles. Because of the insights they gain, they decide to make changes within their institution that have an impact on the larger community.</td>
<td>After participating in dialogue circles on racism and race relations, leaders of several banks decide to work with other members of the community to improve banking services to the city's communities of color.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Changes in community dynamics</strong></td>
<td>Over several years, hundreds of people participate in dialogue circles, creating a critical mass of people involved in community work.</td>
<td>After several years of community-wide dialogue on race relations and racism, democratic and inclusive principles and behaviors begin to emerge in all kinds of settings—public meetings, schools, and workplaces. Throughout the community, people note a heightened sense of being part of a real community. People or groups who usually oppose one another are finding it possible to work together toward racial equity.</td>
</tr>
<tr>
<td><strong>Changes in a community's public life</strong></td>
<td>Once people see the benefits of large-scale dialogue leading to action, they decide to make it an ongoing part of how their community works.</td>
<td>Following a round of dialogue circles on education, a school district decides to conduct dialogue circles on a regular basis to increase citizen involvement in creating and implementing its annual school improvement plan.</td>
</tr>
</tbody>
</table>
Appendix C
Organizing the community:
Different approaches, different processes

Public participation in community issues varies widely, depending on the issue at hand, the political situation, and the people involved.

- The most effective community problem-solving efforts are led by a cross-sector group of leaders who come from all parts of the community and hold a range of viewpoints.
- These “organizers” usually include traditional leaders/decision makers, such as public officials who are part of the power structure, and non-traditional or grassroots leaders.
- Measurable action and change is more likely to happen when key leaders are on-board from the beginning, and work in partnership with citizens to solve problems.

Small-group dialogue as part of community change happens in many ways:

- **Rounds:** Many dialogue circles occur simultaneously in the community, with everyone talking about the same issue at the same time. This process is often followed by a large group meeting, bringing all participants together to share ideas for change. After this, work begins on a range of action ideas.

- **Rolling or ongoing dialogue circles:** In this approach, a few dialogue circles happen at a time, on a continuing basis. From time to time, participants gather in large group meetings to share ideas and begin action. Or, a dialogue group shifts its focus, and decides to work on a particular action idea.

- **Summits or other one-day events:** Small-group, facilitated dialogues are included in day-long events featuring panel discussions, data presentation, and action planning.

- **Other public meetings:** Traditional public meetings, such as town meetings or public hearings, build time in for small-group dialogue. This option provides an opportunity for meaningful give-and-take between officials/experts and citizens.

Mixing deliberation with other public processes:
Small-group public dialogues can be used effectively in combination with a range of other public processes:

- visioning
- planning
- advocacy work
- charrettes
- focus groups
- polling
- public education/awareness campaigns
Appendix D
Focusing on racial equity as we work

Organizing groups should review this list of questions, occasionally, to make sure they are working well together.

Who are we?
• Does our group represent all sectors of our community?
• Who’s missing?
• What efforts have we made to include all racial groups?
• How well does the leadership in our group reflect our community?

How do we interact/communicate?
• How do group members interact?
• Describe the racial dynamics in the group. Are we honest about how things are going?
• How comfortable are we discussing our own issues of race with one another?
• How effective are we at working equitably across racial groups and other differences?
• Do we need to set aside time for team building and deeper exploration of the issues?
• Are we all participating fully, or are we holding back and letting others represent our interests/views.

How are we functioning and making decisions?
• How are meetings run? Who decides?
• How do we decide who will lead the group?
• What are the implications when white people take the lead?
• What dynamics are at play when people of color provide leadership?
• When we plan our meetings, what consideration do we give to racial and cultural differences (location, flexible scheduling, social time/food, etc)?
• Whose voices are heard when we make decisions? (Do our leaders make room for all views?)
• Where do we fall short?
• How could we improve?
Appendix E

Racial dynamics to watch for

As you approach a large community-change initiative, pay attention to racial dynamics.

Consider the following examples. Talk about how you might prevent or correct these situations.

**Planning and organizing**
- The organizing committee recruits one person of color to “represent” the African American / Latino / or Asian “community.”
- The chair of the group selects a large, prosperous, white church—or another venue frequented by whites—as a regular meeting site for the organizing team.
- The group decides to rotate meeting sites between a prosperous white church and a local black church. White attendance is very low when the meeting takes place at the black church.
- The leadership of the organizing team is all white. Whites dominate the conversation and make most of the decisions.
- The organizers speak only English in groups that include people who have limited English skills.
- People use academic language or “insider” jargon when trying to recruit working class people or immigrants.
- The organizers schedule meetings in the middle of the day, assuming everyone can take a long lunch break.
- Leaders run meetings without considering cultural differences around time, or the need for some cultures to connect socially before getting down to business.

**Dialogues and facilitation**
- The white facilitator seems to lead most of the time; the person of color who is co-facilitating tends to do more note-taking.
- The white organizer checks in with the white facilitator about how things are going.
- One or two people of color in a circle of 10 are asked to speak for their whole group.
- People of color do most of the storytelling. Whites listen a lot, but they’re not willing or encouraged to share stories on race on a deeper, more personal level; instead, they are more likely to talk about gender, etc.
• The conversation on race is dismissed and replaced by a discussion of socio-economics or gender (for example). Knowing that it is easier to talk about other issues, the facilitator is not willing to press the group to focus on race.

• The facilitator steps out of the neutral role and begins to “teach” the group.

• During the dialogue, participants make racially charged statements. The facilitators are inexperienced and uncomfortable, so they shut down the conversation.

**Working on action**

• White people are often recruited to lead action groups. While people of color may be invited to participate, they are more “for show.” Old habits and behaviors continue, and whites stay in the lead.

• As people form new partnerships to address problems in the community, they hesitate to include people from different racial groups.

• People who are most affected by new policies are shut out. They have no voice in the policy making.

• Even though many new “actors” are speaking up and trying to make change, they are gradually closed out of the process, and things revert to “business as usual.”

• People with special talents are overlooked or not called upon to contribute because of racial stereotyping.

**Have you seen this happen in your community?**

**Are there other examples you can think of?**

**How can these dynamics be shifted to reflect equity among different racial groups?**

*Many of the ideas in this document were drawn from a workshop—Dismantling Racism: An Essential Element in Creating Community Change.*
Appendix F
Creating a communication plan

Effective programs use strategic communication to advance their goals. Developing a communication plan should be part of every organization’s planning process. Here are some tips to get started:

First, create a plan.

Start with your mission and goals.
Ask, “What are we trying to accomplish through our work?” Your communication strategy should support these goals.

Define your communication goals.
Ask: How can we use communication to reach our goals? What do people need to learn or believe in order to help us achieve our goals?

Identify your target audiences.
Figure out who can help you achieve your goals. Think about important community groups, public officials, or neighborhoods. Learn as much as you can about these people. How much do they know about your group and goals? How much do they care about your issues? What makes them tick?

Develop your messages.
Your messages should inspire your audience to join the process. Develop three simple, short and clear messages to use throughout the process. The messages should explain:

• what the project is.
• what we are aiming for.
• why it matters (to them).

As you go through this process, you will likely find that different audiences require different messages. You will need to create consistent messages about what the project is and what you’re aiming for, and you probably will have to adapt the why-it-matters message for each audience.

Brainstorm strategies.
Think creatively about all the ways to reach your audiences. Ask yourselves: Who are they? What do they read? Watch? Listen to? How do they learn about the community? How can we engage them so that they are receptive and responsive to our messages?

Implement the plan.

Put someone in charge.
Assign an individual (or a subcommittee) to take charge of implementing the plan. You will need someone who can focus on the project and give it consistent attention.

Publicize success.
Share your accomplishments, large and small. Remember, success breeds success.
Prepare for the worst.
Be prepared for problems. This work is complex and challenging, and can be controversial. Negative media coverage or vocal opposition groups may play a role in your community. Prepare for possible crises so that you can respond appropriately and move on.

Evaluate the impact of your work, and adapt as you go.

Look for markers of success.
Over time, you may see:
- positive media coverage.
- awareness of your work.
- more voices from different parts of the community.
- expanded support in the community.
- leaders who are more willing to collaborate.
- evidence that people know you are making an impact.

If you don’t see markers of success, re-evaluate your messages and strategies to be sure they are working for you.

Re-evaluate once a year.
As your work evolves, your communication plan will evolve with it. For example, you may have one set of audiences during the recruitment phase and another during the action. Different strategies will be needed for different audiences.
Appendix G
How to create a fact sheet

Many dialogue-to-change programs develop “fact sheets” to use along with their dialogue circle discussion guides. A discussion guide helps people look at the broad issue; a fact sheet provides “real” information about how the issue is playing out in a particular community. Fact sheets can cover a range of information—from general to specific.

A good fact sheet paints a picture of the community and the issue, and provides a factual framework for the discussion. It should include:

- data that describes the community as a whole;
- data that illustrates the situation or issue;
- information about what is already being done in the community to address the issue.

Get a few people together to think about what kind of information should be in your fact sheet. Be sure this group is diverse and represents many points of view. Don’t forget to include young people in this process, especially if you are holding a dialogue-to-change program on education or youth issues.

Keep the information simple, clear, easy to understand, and brief. Provide enough data to ground the discussion in fact without overwhelming the participants. Be sure the data is balanced and objective, and relates directly to the issue. Keep text to a minimum. Always cite your sources. Simple graphics—such as pie charts or bar graphs—are a good way to get complex information across. You can also use newspaper articles or official documents.

After you have collected all of your information and you are ready to put your fact sheet together, ask: “Is this really essential to the discussion?” Resist the temptation to include everything.
Appendix H
Thinking about fund raising

Successful fund raising happens when people spend time researching the situation. Do your homework!

Invite the steering group to have a conversation about how funding happens in this community. Here are some ideas:

- How does funding happen here?
- Who funds projects?
- Why do people/funders give? What motivates them? Why would they want to give to this project? What would it do for their image in the community? Are they people who like to be seen as leaders on the cutting edge? Are they looking for ways to affect new/different sectors of the community?
- What are funders looking for? (innovation; measurable outcomes; partnerships; detailed program proposals; projects that address specific issues/challenges)
- How can we build relationships with funders?
- What shape do donations take? (in-kind donations; matching funds; lump sums; “tapering” grants, etc.)

Thinking ahead to action outcomes:
- What provisions should we make for supporting action?
- What kind of organizing structure should we develop for action initiatives?
- What funding should we provide?
- Will we pay an action coordinator?
- Will we fund action groups?
Appendix I
Structuring the Action Forum to meet program goals

Most community-based “dialogue-to-change” initiatives combine small-group dialogue with large group meetings. The large meeting following a series of dialogue circles (often called an Action Forum) is the time to consolidate ideas and experiences from a number of dialogues and make plans for action.

An effective Action Forum has many elements (see page 94 in Organizing Community-wide Dialogue for Action and Change). Shape the event to support the kinds of ideas for change. Here are some tips:

For action at the individual level—changes in personal attitudes, behaviors and beliefs
- Build in ample time for individual groups to report out on their experiences.
- Ask for individual testimonials.
- Invite participants to sign a personal pledge to adopt new kinds of behaviors.
- Celebrate!

For collective action or institutional change
- Invite interested organizations to send representatives to the Forum.
- Provide time and space to showcase organizations and initiatives (include display tables and booths).
- Save time for leaders to “pitch” their work to the group.
- Recruit leaders and facilitators to convene and work with new action groups.
- Allow time for new action groups and new collaborating organizations to meet and start their work.
- Develop processes to keep track of action groups, and provide support when they need it.

For “input” to decision makers and policy outcomes
- Working with the policy makers, develop protocols for collecting meaningful, useable information from the circles.
- Set clear expectations. Describe the kind of input policy makers are looking for, and how the information from the dialogue circles will be collected and used.
- Set aside time for the circles to report major recommendations to policy makers. Allow time for questions and answers.
- Capture the information in a summary report, and plan wide distribution through media, web sites, public libraries, and other venues.

Sometimes large-scale deliberation indicates the need for other kinds of public processes to make progress, such as:
- surveys to collect important data;
- focus groups to test ideas or gather information;
- visioning, to create a shared future;
- stakeholder processes to solve a specific problem;
- dispute resolution or arbitration to address an entrenched conflict;
- public awareness campaigns;
- direct political advocacy.
Appendix J
Action Oversight Committee: A diagram

Membership
- Chairs of each Action Group
- Members of Organizing Group
- Others

Functions
- Communicate success. Tell the story.
- Coordinate activity with program goals in mind.
- Solve problems.
- Help find resources.
Appendix K
Helping action groups succeed

The most successful action groups address the following considerations:

Organizational or institutional oversight
To be successful, action groups need support and coordination, as well as a connection to the larger organizing group.
- A sub-group of the organizing group (sometimes called an Action Oversight Committee) takes responsibility for the “action phase” of the work.
- Sometimes, action groups connect with an institution in the community that is already working on this issue.

Leadership
Finding the right leader(s) for an action group is crucial. It is important to have decision makers, connections to partnering organizations, and someone with knowledge of the issue area. To be successful, action groups also need a skilled group-process facilitator who can help the group work together productively.

Example: Participants in a community-based dialogue-to-change program on racism and race relations identify the public schools as a place where racial tensions come out. An action group forms to address the school situation. It is co-led by an assistant superintendent, and a parent who is also a trained group-process facilitator.

Administrative support
Someone needs to be responsible for taking minutes, sending meeting reminders, and staying in touch with the organizers.

Example: A VISTA volunteer provides ongoing administrative support for three action groups formed after a large-scale community dialogue on youth development.

Staying in touch/telling the story
As the action phase gets under way, it is important to keep the community informed about progress, through press coverage, a web site, a newsletter, or other communications.

Example: A large dialogue-to-change program addressing school reform issues launches four action groups. Four months after the Action Forum, the organizers hold a community meeting to hear the plans and progress of each team. Funding partners and the local press are invited to the meeting. Volunteers from the dialogue circles create a community blog to report on the activity.

Resources
Finding resources—such as funding, access to decision makers, or institutional help—often makes the difference in the success of an action group. Steering group members can help with this.

Credibility
Action groups are more successful when their efforts are effective and seen as part of an authentic community effort.