Facilitator Handbook

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TACSI
Tulsa Area Community Schools Initiative

OU UDS
The University of Oklahoma Urban Design Studio
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Facilitation Training

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Facilitation Training
Session One
Facilitation Training
Session One

Agenda

DATE:
TIME: 9am-12pm
PLACE:

9.00AM Welcome and Sign-in

9.05AM Introductions/ice breaker

9.20AM General Information/Housekeeping Items

9.30AM Description of how the Academy was Developed

9.45AM Explanation of the Goals of the Academy

10.00AM Brief Presentation on Each Meeting

10.45AM Expected Outcomes of the Academy

11.00AM BREAK

11.15AM Description of Expectations of the Facilitators, Support Staff & Participants

11.35AM Q & A/Review

12.00PM Adjourn
Session One
Welcome & Sign-in (5 mins)

The session should last approximately three hours. At the end of this session the facilitators will have a thorough knowledge of:

- Development of NPA
- Aims
- Expected outcomes of the Academy
- Role of facilitators in the NPA process

Introductions/Ice breaker (15 mins)

Welcoming the facilitators
Introducing yourself-general details:
- Name
- Degree
- Occupation

Provide information—where we are and why we are here:
- University
- Studio
- Partnership with TASSCI

Pass out a sign-in sheet at this time.

Now ask each of facilitators to introduce themselves
- Name
- School/work
- Impressions of the neighborhood (if they live in the neighborhood surrounding the school)
- Why do you want to be a part of this project?
Session One
General Information/Housekeeping Items (10 mins)

- Make sure the facilitators know:
  - Where the restrooms are
  - There will be a 15 minute break in about ninety minutes.
  - Refreshments are available whenever they would like.
  - Ask participants to keep their cell phones on silent.

- Handout Facilitation Handbook.
  - Explain: handbook designed to guide them through the entire Academy process.
  - Encourage them to read through the handbook as soon as possible and use it extensively.
  - Handbook may address a number of the questions or concerns.
  - Handbook outlines each step of the Academy process.

- Play PowerPoint Presentation:
  - Development of Academy
  - Goals
  - Brief review of each meeting
  - Expectations
  - Outcomes

- Break for 15 minutes.
Session One
Academy Power Point Presentation (30 mins)

- Description of how the Academy was developed
- Explanation of the goals of the Academy
- Brief presentation on each meeting
- Expected outcomes of the Academy

- Q&A:
  - What areas need clarification?
  - How do they feel about this process?
  - Where do they feel they will need help?

- BREAK (15 mins)
Session One
Description of Expectations of the Facilitators (7 mins)

First, our expectations of the facilitators:

- Expected to arrive on time for every meeting.
- Expected to be thoroughly prepared for each meeting.
- Expected to run each of your meetings with enthusiasm and to the best of your ability.
- Must bring the materials you have been given to each meeting and bring the materials created at each meeting back the Studio.
- Expected to record all pertinent data at each meeting and return it to us. Briefly describe how to do this; we will go into more detail on this in tomorrow’s session.
- Do not have to tolerate any rude or uncooperative participants. That is not in the spirit of the Academy and staff will assist should this type of situation arise. Facilitators will also receive, in the second training session, instruction on how to deal with emotions and intervene and solve conflict.
- Expected to evaluate each meeting as honestly as possible.
- Schools should be engaged and supportive of the Academy and have assured us the facilities will be open for facilitators to run the meetings.
Session One
Description of Expectations of the Support Staff (7 mins)

The facilitator’s can expectation:

- To be paid a stipend for 40-50 work hours over two months time. There is also a small reimbursement for mileage. Facilitators should have signed contracts with TACSI and received a form to record mileage. Any questions should be directed to TACSI.

- We will provide the materials needed to undertake every task during the Academy (paper, pens, colored dots, etc.).

- We are here for support, facilitators should feel free to contact their planning team with any questions or concerns throughout the Academy.

- The planning team may not be able to attend every meeting in every school but if there is an issue or concern at a particular school, or a facilitator is sick, we will do our best to assist, whether in person or through extra training time.

- At the end of the process we will undertake a thorough evaluation which will include, in large part, facilitator input. Feedback will be given directly once the evaluation is complete.
Session One

Description of Expectations of the Academy Participants (6 mins)

- Expectations of the participants:
  - Attend each meeting on time.
  - Follow the ground rules established at the first meeting.
  - Be enthusiastic and invested in this process. This can only be helped by successful facilitation!
Session One
Q & A/Review (25 mins)

- Allow 25 minutes for Q&A and review
  - Do expectations seem reasonable?
  - Is further clarification needed?
  - Do facilitators feel they can describe the NPA to others?

- Next week’s session.
  - Concentrating on facilitation skills
  - Guest presenter from the Human Resources Department here at OU.

- Thank facilitators for their attendance and participation.

- Adjourn
Facilitation Training
Session Two
Facilitation Training
Session Two

Agenda

DATE:
TIME: 9am-12pm
PLACE:

9.00AM Welcome and Sign-in

9.05AM Housekeeping Items/Outline of Today’s Session

9.15AM Role(s) of the Facilitator and Why They are Needed

9.30AM How to Run a Successful Meeting

10.00AM How to Deal With Emotions

10.20AM How to Intervene and Solve Conflict

10.50AM Break

11.05AM How to Effectively Prepare for the Academy

11.20AM Data Management, Collection and Evaluation

11.40AM Q & A/Review

12.00PM Adjourn
Session Two
Data Management, Collection & Evaluation Cont. (15 mins)

Data collection we are interested in:
1. How many people attended each meeting? Did this go up or down as the meetings progressed?
2. What was the nature of the participation? Were some more vocal than others? Were you able to involve those who were not as vocal?
3. How does the group interact and work together as the Academy progresses? How can this interaction be enhanced?
4. What are the specific responses and results of the individual exercises you will be undertaking with the group?
5. Are there areas where more training or assistance would have enhanced the success of a meeting?
6. What areas appear to be of most and least concern to each neighborhood?
7. What topics do the Action Plans address?
8. How likely is it that the group will continue to meet and work on the Action Plan following the end of the Academy?

Record Keeping:
The data the Studio receives depends on facilitator recording keeping. Facilitators should:
- Be succinct and efficient.
- Do not try to record every word, get key words and sentences.
- Do not worry too much about spelling or neatness but ensure writing is legible.
Session Two
Q & A/Review (20 mins)

- **Q&A:**
  - How comfortable are you with both running and recording a meeting?
  - Do you understand the results of the meetings and the other topics we are interested in evaluating?
  - Do they see the value and importance of the meeting results and other topics?
  - Are there specific items the trainer staff can help with or areas for further clarification?
  - Again the Handbook highlights the meeting exercises and the nature of the results that may be produced.

- **30 minute break for lunch.** Training for NPA Meeting One will begin after lunch.
Session Two
Welcome & Sign-in (5 mins)

■ The session should last approximately three hours. At the end of this session the facilitators will have a thorough knowledge of:

  • Role(s) and need for facilitators
  • Preparing and running successful community meetings
  • Dealing with emotions
  • Intervening and solving conflict
  • How to manage, collect and evaluate the data produced during the Academy.

■ Welcome back the facilitators
Reintroduce yourself-general details
  • Name
  • Degree
  • Occupation

■ Pass out the sign-in sheet

■ Ask facilitators to introduce themselves to the rest of the group.
  • Name
  • School/Work

■ Make materials from previous meeting available to new comers. Spend time with them at the end of the session to review what they have missed.

■ Ask if there are any questions as a result of the previous training session.
Session Two  
Housekeeping Items/Outline of Today’s Session (10 mins)

- Review any pertinent housekeeping items including:
  - Location of the restrooms
  - Availability of refreshments
  - Placing cell phones on vibrate.

- Outline the agenda for this meeting (each facilitator should have received a copy of the agenda when they arrived):

  The session will begin with approximately an hour presentation by a Professor from the Department of Psychology at OU.

  This instruction will cover:
  - Role(s) and need for facilitators
  - Running successful community meetings
  - Dealing with emotions
  - Intervening and solving conflict

  There will be a break for 15 minutes.

  Following the break instruction will be given on:
  - Effectively preparing for the Academy
  - Data management, collection and evaluation.

  Time will be allowed for Q & A and review.

- Introduce the Professor
Session Two
Role(s) of the Facilitator & Why They Are Needed (15 mins)

- Facilitators roles include:

  a. to provide a neutral party who can support each participant in sharing ideas and in discussions.

  b. to be outcome oriented and help to guide participants who may get a little too involved in the process, losing sight of the outcome.

  c. to help meetings go faster and better by planning, preparation and execution of all phases and materials in the meeting.

  d. to serve as the “go to” person and the information repository for everything produced at the meeting.

Facilitators will see examples of each role and will have abbreviated opportunities to practice a few of them, particularly listening, drawing people out, encouraging creativity and intervening to stay on task.
Session Two
How to Run a Successful Meeting (30 mins)

Sometimes just the word “meetings” can cause dread and bad attitude primarily due to our experiences with meetings. This segment of the training takes the mystery out of running great meetings. We will cover how to:

1. get participants comfortable with each other
2. avoid wasting time
3. keep great records of the progress that was made
4. involve smaller groups to work between meetings
5. get the great ideas on the table that lead to tremendous progress
6. keep interest and participation high
7. get everyone excited about the next meeting.

There will be practice opportunities, brief but poignant, to demonstrate successful meeting practices.
Session Two
How to Deal With Emotions
(20 mins)

This session presents the benefits of emotion and techniques to recognize them, give them credence, and diffuse or redirect them to positive ends.

- Why do we think emotions in meetings are a bad thing?
- If we don’t “feel” anything about the subject, why be involved?
- Emotions are the key motivators to action, involvement, and commitment.
- Emotions behind reactions can be a powerful tool for a facilitator who doesn’t fear them.
- Sometimes we would rather not see emotions.
- However, most of us could benefit from a bit more skill in dealing with them.
Session Two
How to Intervene & Solve Conflict (30 mins)

First, conflict is not a four-letter word. As with emotions, which can often lead to conflict, the conflict can be a tool to resolve unspoken but internally held disagreements. Usually intervention is employed when an individual or a group is stuck. Depending on the situation, several styles may be appropriate, and with some conflicts, you may need to use most of them.

Facilitators will see examples of:
• Appropriate styles of intervention to guide participants towards alternative pathways, ways of thinking, or new approaches
• Assessments of risk to them as facilitators
• Most effective intervention for specific situations/groups to move ahead and act effectively

Facilitator as Intervener will:
• Rehearse several styles
• Practice “navigating” a group from conflict to team work
• Potentially move the group from high center

Conclude the presentation provided by a Professor from the Psychology Department at OU.

Q&A
1. Are there any areas that need clarification or further practice?
2. Do the facilitators feel comfortable with their roles and what they are expected to accomplish?
3. Where do they feel they will need further assistance?

BREAK (15 mins)
Session Two
How to Effectively Prepare for the Academy (15 mins)

Cover each of the following points for effective preparation in as much detail as you see necessary.

Effective Preparation:

1. Study the Facilitation Handbook closely, it has been designed to walk facilitators through the entire Academy process.

2. Ask questions! All questions are important and welcomed. The training and support staff are here and more than willing to answer questions.

3. Practice the examples and role-playing exercises in order to feel comfortable.

4. Attend and thoroughly engage in all the training sessions provided.

5. Ask for help when needed. Don’t suffer in silence.

6. Get familiar with the meeting venue. Learn where the restrooms, exits, power sockets and any other items needed are located.

7. Encourage facilitators to invite people they know from the neighborhood. Participation is the key to success.

Q&A

• Do facilitators feel capable of following these preparation guidelines?
• Do they have other tips or techniques they use for preparation that they would be willing to share with the group?
• Are any of the preparation guidelines unreasonable or difficult to achieve?
Session Two
Data Management, Collection & Evaluation (15 mins)

A great deal of data will be generated at each meeting of the Academy. It is the role of the Studio staff to review and collate the relevant data both for your use at future meetings and for the successful evaluation of the Academy.

Facilitator Expectations:
• legibly record data
• bring data to each review meeting
• general rule: “if in doubt, make a record of it”

Facilitators will be provided:
• flip charts
• pens
• pencils
• note paper
Use these items to record the data produced. At some of the meetings there may be support staff in attendance that can assist with recording the discussions, suggestions and results of the various exercises being lead.

It will be somewhat of a balancing act to both run the meeting and take a thorough and useful record of the meeting.

FLIP CHARTS: Flip charts are particularly useful for recording comments as the group discusses. They also allow the group to see what has been written and agree or reword the interpretation.

NOTES: Try to record those items viewed as pertinent, with regard to the instruction received in the Academy, when they are fresh in mind. This may involve staying at the end of the meeting to finish notes and make any additions or corrections.
Meeting One

neighborhood planning academy
Meeting One
What is your Neighborhood? Definitions and Organization

Agenda

DATE:
TIME:
PLACE:

6.00PM Welcome and Sign-in

6.05PM Introductions

6.25PM Ground Rules

6.30PM Academy Overview

6.40PM Teaching/Discussion/Activity – Neighborhood Definition

7.10PM Teaching/Discussion/Activity – Neighborhood Organization

7.40PM Meeting Review

7.55PM Evaluation
Meeting One
Training Schedule

Agenda

DATE:
TIME:
PLACE:

12.00PM Background
12.15PM Welcome and Sign-in
12.20PM Introductions
12.30PM Ground Rules
12.45PM Academy Overview
1.00PM Neighborhood Definition
1.20PM Neighborhood Organization
1.40PM Meeting Review
1.50PM Evaluation
2.00PM Adjourn
Introductions End (15 mins)

- Begin by introducing yourself to the entire group.
  - Name
  - Brief background of yourself
  - Position at the school
  - How long you have worked at the school
  - Live in the neighborhood?

- Go around the room and let people introduce themselves.
  - Name
  - How long have they lived in the neighborhood?
  - Involvement in any neighborhood organizations?

- Try to keep the introductions going and limit any discussion.
  - Questions and answers may be necessary for clarification.
  - Ensure everyone knows it is important to keep moving so that everyone has a chance to introduce themselves.

- Finish by indicating where the bathrooms are located.

- Light refreshments have been provided.

- Meeting will last for approximately 2 hours.
Welcome

- This is the first meeting of the Academy, as such you have the opportunity to set the tone for the whole process.

- Try to greet people as they arrive
  - Introduce yourself
  - Be confident
  - Be enthusiastic

The Academy is designed to be a positive process for both yourself and the neighborhood.

- Allow people to socialize for a couple of minutes while you wait for people to arrive.

- Pass out the sign-in sheet

- Ask everyone to sign-in
  - Providing their name
  - Address
  - Phone number
  - Email address

- Pass out name tags and pens (so you and the rest of the participants can start learning people’s names).
Ground Rules (10 mins)

Review ground rules to create an environment that is safe and open for dialogue as the group may have to face some difficult or controversial issues.

List the following ground rules:

1. Be timely to the meetings
2. Participate to your fullest
3. Speak one at a time, do not interrupt others or have side conversations
4. Allow everyone to speak
5. Listen to others
6. No question is silly, no idea is bad
7. Try to stay on topic, the facilitator may redirect the discussion where necessary
8. Respect differences and encourage the other participants
9. Participants are welcome to join the academy at anytime, it is their responsibility to get updated on what they may have missed
10. Phones and pagers should be kept on silent or vibrate mode

Q&A
- Is clarification needed?
- Do participants agree on the ground rules?
- Any additional ground rules the group would like to suggest?

Once you/group have an agreed upon a set of ground rules post them somewhere visible at each meeting.

Enforce the ground rules, from the beginning of the process to emphasize their validity.

Make sure you are following the ground rules also!
Move into the following review of the Academy:

- The Neighborhood Planning Academy is a collaboration between the University of Oklahoma Urban Design Studio and the Tulsa Area Community Schools Initiative.
- Work has been undertaken to develop this Academy since the Fall of 2006 and has been created with regular input from neighborhood leaders across Tulsa.
- All the facilitators have been trained by the University of Oklahoma Urban Design Studio to facilitate the Academy process.

The Academy has been designed with the following 3 goals in mind:

1. To create a more meaningful role for neighborhoods in planning and decision-making processes that affect them.
2. To educate neighborhoods on their roles and responsibilities and empower them to organize and accomplish their goals, as a result building pride in communities.
3. To encourage understanding and collaboration across neighborhoods and with schools, experts and city officials.

There will be four meetings including this one and the following topics will be covered:

1. Neighborhood definitions and organization.
2. Survey of the important issues in the neighborhood.
3. Development of neighborhood priorities and the nomination of a neighborhood representative.
4. The creation of a neighborhood action plan.
Academy Overview Cont.

The length of each meeting is approximately 2 hours with the dates/times set by the facilitators according to the schedule which works best for their neighborhood.

It is hoped that the Academy will have the following results:

1. Action Plans (1 for each neighborhood) addressing the top concern of each neighborhood

2. The establishment of a structure for neighborhood planning and the creation of active neighborhoods

3. A community nominated neighborhood representative to champion the action plan and maintain neighborhood participation

4. An overview of the major concern in each Community School neighborhood

5. A potential pilot project for the City of Tulsa’s comprehensive planning effort

6. Local school professionals trained to facilitate neighborhood planning sessions

Ask if there are any questions, comments or areas that need clarification or further explanation.

Today’s meeting is concerned with defining the neighborhood and understanding the current organization and future organizational needs of the neighborhood.
Neighborhood Definitions
(30 mins)

The first exercise will cover the following topics:

1. The physical boundaries of the neighborhood.
2. The social, demographic and economic make-up of the neighborhood.

To answer the question – What is your neighborhood?

- Hand out neighborhood boundary street maps (prepared by the Urban Design Studio) of the area surrounding the community school to each participant.
- Point out the location of the school, north arrow and main streets.
- Give the participants time to get familiar with the map and assist them where necessary. Each participant should have pens to draw on the maps.

- Ask each participant to:
  - Mark on the map the location of their home.
  - Draw the boundaries of the neighborhood as they see them.
  - Gather the maps together
  - Discuss how similar or different each participants idea of the neighborhood are once everyone has completed the task.

- Lead a discussion on the results.
  - Look for any significant areas of similarities or divergence.
  - Is there a shared central area and fuzzy boundaries?
  - Are the boundaries of the neighborhood natural or manmade? Focus on any areas of consensus to help the group agree on a neighborhood boundary.
Neighborhood Definitions, Cont.

■ Explain:
  • The maps will be analyzed by the Urban Design Studio
  • One map of the neighborhood will be established as defined by the group

■ Put up a large, clean map of the area surrounding the community school

■ Begin to discuss with the group the following questions. *Mark the answers on the map where possible and list the rest of the responses on the board or flip chart.*

1. What are the neighborhood landmarks and where are they located? *Mark them on the map.*

2. Which are the main streets and intersections? *Mark them on the map.*

3. Are there any areas viewed as favorable and unfavorable? *Mark them on the map with smiley faces or frowney faces respectively.*

4. What makes these areas favorable or unfavorable?

5. How many people live in the neighborhood?

Facilitators should have:

- copy of large neighborhood map
- easel
- flip chart
- markers
- sticky dots
- individual maps
- Census Material-prepared by studio-ensure understanding of Census material-highlight relative areas to the group: income, ethnicity etc.
Neighborhood Definitions Cont.

6. What ethnic groups live in the neighborhood?

7. Is the neighborhood predominantly residential, commercial, and industrial or a mixture?

8. What age groups live in the neighborhood? Which group makes up the majority?

9. What kind of buildings does the neighborhood have? Wood, brick, siding, etc.

10. What is there to do in the neighborhood? Is there a park, a library, restaurants, stores or places of worship? Mark them on the map.

11. What services are there in the neighborhood? Are there health care, educational, or social services? Mark them on the map.

- Show and summarize census data provided by studio regarding basic neighborhood demographics.

- Review the groups responses against the census data, highlighting areas of disagreement, contradiction or agreement.

- Ask the group to consider the results of this exercise with regards to potential action plan topics for their neighborhood.

- Q&A

- COLLECT ALL MATERIAL PRODUCED BY GROUP AND BRING TO NEXT MEETING AT STUDIO
Neighborhood Organization (20 Mins)

Move the group into a discussion of the organization of the neighborhood for the final activity.

- Ask the following questions; list the responses on the board:

1. Is there a neighborhood association(s) currently operating in the neighborhood? List the name(s).

2. Are there any other organization(s) in the neighborhood?

3. What do the neighborhood association and other organizations in the neighborhood do?

4. Survey the participants on whether they are members of a neighborhood organization.

5. How do the participants view the organizations in the neighborhood? Positively, negatively or neutrally?

6. How could the current organizations be improved?

7. If there is no existing neighborhood association, are the participants interested in forming or reforming one?

8. If there is an existing neighborhood association, how organized is the group? Does the group know what the level of participation is?

- Present the information the Urban Design Studio has given you on organizations in the neighborhood and its vicinity.

- This is a good opportunity to discuss the Working in Neighborhoods office of the City of Tulsa using the information you have been provided.
Neighborhood Organization, Cont.

- If there appears to be a lack of organization in the neighborhood discuss with the group the reasons for getting organized:
  1. Build a sense of community among neighbors.
  2. Address a particular issue of the neighborhood.
  3. Provide the neighborhood with an effective communication link with government officials and other influential groups.
  4. Empower residents to work together in improving their neighborhood.

- Describe how to spread the word about the organization including:
  - Establishing block captains
  - Writing
  - Producing newsletters and flyers
  - How to create a telephone tree
  - Handouts are available for further information on the various topics covered (which the participants are welcome to take)

- If the neighborhood appears to be organized discuss with the group any areas that they feel they need further information or training in, such as:
  - Methods of spreading the load of the work
  - How to run successful community meetings and creating agendas
  - Finding the right location to meet; making group decisions; sticking to a schedule
  - Establishing bylaws
  - Becoming a corporation

- To begin establishing organization in the neighborhood, challenge the participants to invite another person in the neighborhood who is not present to attend the next meeting of the Academy.
Meeting Review
(15 mins)

- Finish the meeting by:
  - reviewing the initial results of the mapping exercise summarizing the makeup of the neighborhood
  - reviewing participants perception of census data
  - outline the current level of organization in the neighborhood

- Hand out the surveys

- Hand out the reminders of the next meeting

- RETURN WITH:
  - NOTES of discussions and impressions
  - MAPS, large collective map and small exercise maps
  - SIGN-IN SHEET
  - SURVEYS

- ADJOURN 8:00PM
Meeting Two
Meeting Two
Viewing Your Neighborhood with a Critical Eye

Agenda

DATE: 
TIME: 
PLACE: 

5.00PM Welcome and Sign-in

5.05PM Recap of Previous Meeting

5.25PM Teaching/Discussion/Activity – SWOT Analysis

6.40PM Meeting Review

6.55PM Evaluation
Facilitation Training
Meeting Two

Agenda
DATE:
TIME: 9-11AM
PLACE:

9.00AM Background
9.05AM Meeting One Review
9.30AM Meeting Two Introduction
9.35AM Welcome and Sign-in
9.40AM Recap of Previous Meeting
9.50AM SWOT Analysis
10.30AM Meeting Review
10.50AM Evaluation
11.00AM Adjourn
Meeting Two
Training Recap

**Background**
The training meeting should last approximately 2 hours. At the end of this session the facilitators will have thoroughly reviewed Meeting One and be able to lead the second meeting of the Academy.

- **Meeting One Review**
- **TURN IN Meeting One Materials**
  - This is the opportunity for the facilitators to give the Studio the materials created at Meeting One and to share with us and the other facilitators how the meetings went.

- **MEETING ONE DISCUSSION:**
  - Levels of attendance
  - Hand-in the sign-in sheets
  - How many participants were at their meeting
  - What they thought about the number
  - Too many, too few, the right amount.
  - Nature of the participation
  - Was it easy to get people involved?
  - Were some more dominant than others?
  - Describe the group dynamics
  - Share any tips for dealing with certain situations
  - Example:
    - Methods of getting all the participants involved
    - Resolving conflict
    - Dealing with emotions
    - Reducing the dominance of certain participants

- If there are certain areas in particular that a number of the facilitators are requesting assistance with, we will go over these in detail.

- **Discuss the ground rules**
  - How were they received?
  - Were any changes made to them?
  - Are the facilitators comfortable with them and with enforcing them?
Welcome (5 mins)

- Greet people as they arrive and introduce yourself to those you have not met before.
- Begin the meeting, (once it seems that most people have arrived and are seated).
- Introduce yourself if there are new participants.
- Have each person briefly introduce themselves.
- Pass out the sign-in sheet and name tags.
Recap of Previous Meeting (20 mins)

- Provide a brief recap of the last meeting.

- Point out the ground rules that were established and keep them posted at a visible location on the wall.
  - You may need to read through the rules again if there are a number of new participants.

- Emphasize that the rules have been created to ensure that the environment of these meetings is open and allows only respectful discussion.

- Show the map of the neighborhood with the boundary defined and agreed upon by the participants.
  - Allow a short time for comments and discussion.

- Summarize the level of organization in the neighborhood that was discussed two weeks ago.
  - Positively acknowledge if anyone was able to bring another person with them this week.

- Meeting will last for approximately 2 hours.

- Light refreshments have been provided.

- Point out the location of the restrooms.
SWOT Analysis (1 hr 15 mins)

SWOT analysis is a basic neighborhood planning tool. It will be used to:

- Encourage the participants to survey the current conditions in the neighborhood
- Establish ideas
- Create opportunities for the future

- The results of this analysis will provide the basis for the development of a neighborhood action plan.

- As the facilitator you must remain neutral. You should not lead or direct responses but rather ensure the participants have a firm understanding of what strengths, weaknesses, opportunities and threats are.

- If it seems that certain members of the group are dominating the meeting encourage those who are less vocal to participate. This may mean going around the group one person at a time asking for their responses. However, if you have laid the ground rules at the beginning of the meeting for fair and equal participation it is hoped that this problem will not arise.

- There should be plenty of time for this exercise and for everyone to express their opinion. Some discussion will inevitably arise, try to limit the amount of discussion and explain that at the next meeting their will be time to discuss the results further. At that time the group will be asked to prioritize the responses to the SWOT and agree on the top priority for the neighborhood.
SWOT Analysis Cont.

- SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats.
- This exercise is designed to establish a comprehensive picture of the strengths, weaknesses, opportunities and threats of the neighborhood from this diverse group of participants.
- All responses are welcomed at this time.
- Participants should think about all aspects of their neighborhood
  - hopes
  - fears
  - appearance and perceptions of the neighborhood
- There may be areas where not everyone will agree (and you may not agree) but this tool is being used to allow the expression of all thoughts and ideas about the neighborhood at this time.

*Participants must be made aware that the SWOT analysis is concerned only with the neighborhood and not the whole city or a larger area.*

- REVIEW NEIGHBORHOOD BOUNDARY:
The definition of the neighborhood will have been established at the last meeting and a map should be posted on the board so the participants are aware of the exact area to be discussed. You can outline the area verbally.

- Ensure the participants understand:
  - Strengths and weaknesses are the current, internal issues that affect the neighborhood.
  - Opportunities and threats are potential, future external issues affecting the neighborhood.

*Issues and ideas may arise that will become strengths or opportunities that the neighborhood can build upon. Or issues and ideas may arise that are viewed as obstacles the neighborhood needs to overcome.*

- Either of these responses can become valid ideas for a Neighborhood Action Plan. It is both the internal and external influences on the neighborhood that affect life in that neighborhood.

- Explain that it is hoped that one major outcome of this process will be a shared vision and willingness to work as a team for the betterment of the neighborhood.
SWOT Analysis Cont.

- TIMING: 1 hour 15 minutes
  - This gives you just under 20 minutes for each category. *Ensure the participants know how long they have to brainstorm on each topic.*
  - Try to allow an equal amount of time on each aspect of the SWOT analysis.
  - Do not allow the time to be taken over by those who wish to vent. Rather allow people to get any negative thoughts off their chest and move onto the more positive aspects of the neighborhood and its future.

- Repeat aloud and write each response clearly on the board/flip chart under the correct heading.
- Allow the participants to clarify that they agree with what you have written. *Try not to duplicate comments and be succinct, but avoid using acronyms and abbreviations that the group may not understand.*

Questions and Examples for SWOT:

- **Strengths** - to discover the assets of the neighborhood.
- **Questions:**
  1. What attracted you to this neighborhood?
  2. What assets or resources are available that you would miss if you had to leave the neighborhood?

- **Examples of neighborhood strengths may include:**
  - Location e.g. close to good schools, churches, or a library.
  - Quality housing.
  - The character of the community.
  - Public transit facilities.

Strengths and Weaknesses are internal, current issues effecting the neighborhood.
SWOT Analysis Cont.

- **Weaknesses** - to discover what is lacking in the neighborhood.
  - **Questions:**
    1. What is not available or in poor condition in the neighborhood?
    2. What are the needs of the neighborhood?
  - **Examples of neighborhood weaknesses may include:**
    - Lack of commercial development.
    - Aging infrastructure.
    - Lack of green space.
    - Poor maintenance of homes.

- **Opportunities** - to discover what could be improved in the neighborhood.
  - **Questions:**
    1. What would you like to see in the neighborhood - changes, improvements or additions?
    2. How can the assets of the neighborhood be built on?
  - **Examples of neighborhood opportunities may include:**
    - Historic restoration.
    - Establishment of green space.
    - Establishment of strong neighborhood identity.
    - Low cost of land and buildings.

- **Threats** - to discover those aspects that affect the neighborhood negatively.
  - **Questions:**
    1. What do you not like about your neighborhood?
    2. What do you avoid in your neighborhood?
    3. What in the neighborhood attracts crime?
  - **Examples of neighborhood threats may include:**
    - Absentee property owners.
    - Abandoned buildings.
    - Speeding/Traffic.
    - Criminal/Drug activity.

Opportunities and Threats are potential, external, future issues effecting the neighborhood.
Meeting Review (10 mins)

■ Review SWOT Analysis:

*Once the time is up or the participants appear to have given all their responses begin the review of the SWOT analysis.*

- Briefly cover each response that has been given.
- Allow time for clarification if the need arises.
- Combine similar items if possible and point out items appearing on more than one list.

■ Participants:

- Each participant will receive a copy of tonight’s results to review.
- Results will be used for discussion at future neighborhood meetings.
- Ask participants to think about which of the issues raised tonight should be addressed in the Neighborhood Action Plan.

■ Thank the participants for their attendance and pass out the meeting evaluation and a reminder of the next meeting.
Meeting Three
Meeting Three
Developing Priorities and Representatives

Agenda

DATE:
TIME:
PLACE:

5.00PM Welcome and Sign-in

5.05PM Recap of Previous Meeting

5.25PM Teaching/Discussion/Activity – Prioritize

6.10PM Teaching/Discussion/Activity – Nominate

6.40PM Meeting Review

6.55PM Evaluation
<table>
<thead>
<tr>
<th>TIME</th>
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<tr>
<td>9.00AM</td>
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<td>9.30AM</td>
<td>Meeting Three Introduction</td>
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<tr>
<td>9.35AM</td>
<td>Welcome and Sign-in</td>
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<tr>
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<td>Developing Priorities</td>
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<tr>
<td>10.15AM</td>
<td>Nominating a Neighborhood Representative</td>
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<tr>
<td>10.40AM</td>
<td>Meeting Review</td>
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<tr>
<td>10.50AM</td>
<td>Evaluation</td>
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<tr>
<td>11.00AM</td>
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</table>
Meeting Three Recap

Background

- Today’s meeting
  - Held before NPA Meeting Three
  - Meeting Three: Developing Priorities and Representatives - is designed to initiate discussion on the results and experiences at Meeting Two and to prepare the facilitators for Meeting Three
  - Meeting: approximately 2 hours

- Meeting Two Review

- Turn in NPA materials created at Meeting Two:
  - Flip charts with the SWOT analysis
  - Meeting evaluations
  - Share with group how the meetings went
  - Hand-in the sign-in sheets
  - Review the levels of attendance
  - How many participants were at their meeting
  - What do you think about the numbers – too many, too few, the right amount?
  - Were there more or less than at previous meeting(s)?
  - Why do they think the numbers have changed?
  - What things can we do to increase the attendance?
  - How do you deal with a larger group?

- Nature of the participation
  - Was it easy to get people involved?
  - Were some more dominant than others?

- Describe the group dynamics

- Share any tips for dealing with certain situations that have not arisen previously or have not been reviewed in depth before.

- If there are certain areas in particular that a number of the facilitators are requesting assistance with, go over these in detail.

- Discuss the ground rules
  - How were they received?
  - Were any changes made to them?
  - Are the facilitators comfortable with them and with enforcing them?
Welcome

- Greet people as they arrive and introduce yourself to those you have not met before.
- Begin the meeting (once it seems that most people have arrived and are seated).
- Introduce yourself (as you did at the first meeting, if there are new participants).
- Have each person briefly introduce themselves again.
- Pass out the sign-in sheet.
- Pass out name tags.
Recap of Previous Meeting

Provide a brief recap of the last meeting.

- Point out the ground rules that have been established and keep them posted at a visible location on the wall.
  - You may need to read through the rules again if there are a number of new participants.

- Emphasize that the rules have been created to ensure that the environment of these meeting is open and allows only respectful discussion.

- If there are new participants explain that at the previous meeting the group undertook a SWOT analysis on the neighborhood.

- If necessary briefly summarize what a SWOT analysis is.

- Point out the summarized results of the SWOT analysis that you have posted on the wall.

- Allow a short time for comments and discussion, you will begin the review of the results shortly.

- Meeting will last for approximately 2 hours.

- Light refreshments have been provided.

- Point out the location of the restrooms.
Developing Priorities

Prior to the meeting you should have the sheets with the responses to the SWOT analysis hung up around the room. Staff has condensed and summarized the responses to help you with this review.

First activity of this meeting:
- Ask participants to prioritize the results of the SWOT analysis completed at the previous meeting.
- Vote on the top priority:
  - To be tackled in the first Neighborhood Action Plan.
  - This Action Plan will then be created in the last meeting of this Academy.

Before beginning this section, allow the participant’s a short time to:
- Walk around
- Review the sheets

Start activity by reviewing the results of the SWOT analysis with the group to ensure everyone is aware of the responses and allow an opportunity for clarification. Try not to allow the entire review session to run for more than 15 minutes.

Explain that in order to develop an Action Plan:
- The group must agree on the top priority for the neighborhood—refer to SWOT.
- The top priority can be a strength or opportunity—will build on in Action Plan.
- Could be obstacle the neighborhood needs to overcome through solutions in the Action Plan.
- Any of these responses can become valid ideas for a Neighborhood Action Plan.
Developing Priorities Cont.

- **VOTING:**
  - Hand out to each participant three colored dots.
  - Allow the participants 5 minutes to place their dots by the three topics that are most important to them (*the participants may place all three votes under one category, for example, all three votes under the strength category or in various categories*).
    - Vote on those topics that are most significant to them
    - Limit any discussion between participants on the votes, *at this point it is up to the individual to decide for themselves*.
  - Once everyone has placed their dots and returned to their seats you should have a good visual representation from the colored dots as to which are the top priorities of the group.
- **Topic of the Action Plan** - topic that receives the most dots
- **Tie/Revote**
  - Hand out one dot to each of the participants
  - Participant will place dot on the topic viewed as the most important of the tied topics. This should lead to a clear winner.
  - Make sure that everyone understands and accepts the process for establishing the top priority.

- **One priority can be tackled in this Academy. The results of the prioritizing exercise will be given to each participant at the next meeting. Therefore, if the neighborhood desires, other important issues highlighted at tonight’s meeting can be tackled in the future.**

- Possible solutions and action steps to be taken on the subject.
  - Process similar to the format of the SWOT analysis
    - Participants state their ideas
    - Someone records them on the board/flip chart
  - The solutions or action steps can be those taken by:
    - individuals
    - the neighborhood
    - the city
    - other organizations.
  - At this point all ideas are valid and should be written up. The discussion should be limited to solutions and action steps to be completed rather than for placing blame or complaining about actions that should have been taken in the past.
Nominating a Neighborhood Representative

Explain to the participants that in order to take the work of the Academy and the Action Plan forward it is useful to have a Neighborhood Representative voted for by the group. The group will also nominate and vote for an alternate representative who will be available to assist the Neighborhood Representative and stand in if they are unavailable.

Please ensure that you explain clearly the following duties and responsibilities of the Neighborhood Representative:

• Responsible for effectively promoting the Action Plan and its results to the rest of the neighborhood and other relevant entities, e.g. the City of Tulsa, local businesses and organizations.

• Commit to participating in all events involved in the promotion and realization of the plan.

• Responsible for presenting the plan where necessary and maintaining the support for and interest in the plan once the Academy is completed.

• Responsible for gathering any relevant information to assist in the success of the Action Plan.

• Responsible for establishing and maintaining communication between the participants and other relevant entities. This may involve conducting meetings, sending emails and making phone calls.

• Responsible for remaining impartial and fairly representing the views of the entire group and not of themselves or a sector of the group.

• Able to make presentations, answer questions on behalf of the neighborhood and be the main point of contact for the Action Plan.
Nominating a Neighborhood Representative Cont.

As long as the Neighborhood Representative lives in the neighborhood and is able and willing to take on the responsibilities previously listed it does not matter if they are a homeowner or renter, a business owner, have lived in the neighborhood for many years or just a few, are young or old, working or retired.

Candidates for Neighborhood Representative and alternate may nominate themselves or be nominated by the participants.

Allow the group 10 minutes to discuss who will be nominated for Neighborhood Representative, then ask for the names.

Write the names on the board. If anyone is nominated who does not wish to be a nominee you should remove their name.

Multiple Nominees: I
- Write each name on the ballots
- Hand them out to each participant
- Give the participants 5 minutes to place their vote
- Do not allow any discussion.
- Each participant gets one vote.
- Collect the ballots from the participants
- Review the results

Winner—if there is an outright you should announce their name.

Tie—if there is a tie the group will be asked to vote again and select one as the Neighborhood Representative and the other the alternate
- If necessary hold a similar ballot to nominate the alternative

Again make sure the group understands and accepts the process of establishing a Neighborhood Representative and alternate.
Meeting Review

- **Review the top priority**
  - Voted for by the group
  - For the Action Plan
  - Methods highlighted to tackle Plan

- **Neighborhood Representative**
  - Announce again the names of the Neighborhood Representative and alternate.
  - Hand each rep the specific handouts for position (handout includes)
    - Welcome to the position
    - Brief outline of their responsibilities
    - Relevant contact information.

- Thank the participants for their attendance
  - Pass out the meeting evaluation
  - Pass out reminder of the next and last meeting.
Meeting Four
Producing an Action Plan

Agenda

DATE: 
TIME: 
PLACE: 

5.00PM Welcome and Sign-in

5.05PM Recap of Previous Meeting

5.25PM Teaching/Discussion/Activity – Producing an Action Plan

6.40PM Meeting Review

6.55PM Final evaluation
Facilitation Training
Meeting Four

Agenda

DATE
TIME
PLACE

9.00AM Background
9.05AM Meeting Three Review
9.30AM Meeting Four Introduction
9.35AM Welcome and Sign-in
9.40AM Recap of Previous Meeting
9.50AM Producing an Action Plan
10.40AM Meeting Review
10.50AM Evaluation
11.00AM Adjourn
Meeting Four Recap

Background

- **Today’s meeting**
  - Held before NPA Meeting Four
  - Meeting Four: Producing an Action Plan - is designed to initiate discussion on the results and experiences at Meeting Three and prepare the facilitators for Meeting Four
  - Meeting: approximately 2 hours
  - Thoroughly review of Meeting Three and be able to lead the fourth and final meeting of the Academy

- **Meeting Three Review**
  - Turn in NPA materials created at Meeting three:
  - SWOT analysis votes.
  - List of possible solutions and action steps to be taken.
  - Names of the Neighborhood Representative and alternate).
  - Hand-in the sign-in sheets.
  - Review the levels of attendance.
  - How many participants were at their meeting?
  - What they thought about the number – too many, too few, the right amount.
  - Were there more or less than at previous meeting(s)?
  - Why do they think the numbers have changed?
  - What things can we do to increase the attendance?
  - How do you deal with a larger group?
  - How did the meetings go?

- **Nature of the participation**
  - Was it easy to get people involved?
  - Were some more dominant than others?
  - Were people willing to nominate themselves and/or others?

- **Describing the group dynamics**
  Share any tips for dealing with certain situations that have not arisen previously or have not been reviewed in depth before.

- If there are certain areas in particular that a number of the facilitators are requesting assistance with, go over these in detail.

- **Discuss the ground rules.**
  - How were they received?
  - Were any changes made to them?
  - Are the facilitators comfortable with them and with enforcing them?
Welcome

- Greet people as they arrive and introduce yourself to those you have not met before.

- Begin the meeting (once it seems that most people have arrived and are seated).

- Introduce yourself (as you have done at the previous meetings, if there are new participants).

- Have each person briefly introduce themselves again.

- Pass out the sign-in sheet.

- Pass out the name tags.
Recap of Previous Meeting

Provide a brief recap of the last meeting.

- Point out the ground rules that were established and keep them posted at a visible location on the wall.
  - Read through the rules again if there are a number of new participants.

- Emphasize that the rules have been created to ensure that the environment of these meetings is open and allows only respectful discussion.

- Show the results of the SWOT analysis and highlight the top priority voted for by the participants at the previous meeting.

- Explain that the top priority will be addressed in a Neighborhood Action Plan to be created at this meeting.

- Introduce the elected Neighborhood Representative and alternate, briefly review their roles and responsibilities.

- Allow a short time for comments and discussion.

- Meeting will last for approximately 2 hours.

- Light refreshments have been provided.

- Point out the location of the restrooms.
Producing an Action Plan

At the previous meeting the group will have chosen the top priority issue or concern to be tackled in the first Neighborhood Action Plan. Final meeting of the Academy- the Action Plan will be created

- A simple step-by-step process to producing an action plan will be taught.
- Participants will be encouraged to create future Action Plans for their neighborhood.

To begin the process of creating the Action Plan:

- Pass out handout with the headings of each component of an Action Plan.
- Explain: Action Plan should be simple and manageable being no more than two pages in length if possible.

Write the following headings on the board and explain what each category means.

1. **Goal(s) and Measurements** - broad statements about what the participants want to achieve in their neighborhood to address the top priority.

   - Long-term ideals
   - The group may choose to have one or a number of goals
   - Goals should also include measurements to keep track of whether the goals are being reached. *For example, if stray dogs in the neighborhood is the top priority, the goal may be to reduce the number of stray dogs by a certain amount.*

The groups first step in the Action Plan will often be to go out and measure the current situation in the neighborhood and set a realistic goal and timeline for improving the situation.
Producing an Action Plan Cont.

2. **Actions** - specific actions to take to reach the goals.

- Solutions to the top priority should be brainstormed by the group in order to establish a list of action steps.
- These actions are often quantifiable and should include a target date for completion and the level of improvement desired. *For example: to reduce the number of stay dogs in the neighborhood by 25% by fall 2010.*
- Categorized actions into short, medium and long term steps.
- Precisely written actions stand a better chance of being acted on because they state things:
  - succinctly
  - specify who needs to do what, by when

3. **Implementation** – steps to get the plan implemented.

- List of people and/or agencies that can assist with implementation
- Including methods for winning support for and approval of the Plan
- Relevant stakeholders may include
  - residents
  - local churches
  - schools
  - local businesses
  - institutions
  - certain departments of the City of Tulsa (e.g. WIN, Public Works)
  - elected representatives e.g. City Councilors
- List of which actions should be undertaken first
  - What resources are needed?
  - Where they will be found?
- Prioritizing needs helps the relevant decision makers decide what to address first.
- Tasks that can be undertaken by the neighborhood should be assigned either voluntarily or by the Neighborhood Representative if necessary.
4. **Evaluation** - methods for reviewing the success of implementation, deciding if the plan is still feasible, and updating it if it is not.

- The deadlines that have been established in the earlier steps need to be evaluated to see if they are being met or should be adjusted.
- A series of meetings should be held following the Academy to evaluate the success of implementing the Plan and provide feedback on its various aspects to the rest of the participants.

- The success of the plan will depend in part on all the Plan elements being tightly interrelated and supporting one another.

- Encourage the participants to review what they have learned about their neighborhood in this Academy when considering the contents of their Action Plan.
  - *For example, the Academy will have assisted the neighborhood in defining its boundaries, in reviewing the facilities in the neighborhood, and in understanding the demographics of the neighborhood. This information is significant to the life of the neighborhood and therefore to the shaping of an effective Action Plan.*

- Take each of the four categories in turn and ask the participants to make suggestions of what should be included in each.  
  *By this point the participants will have undertaken a number of exercises together to encourage them to function as a group.*

- When ideas are suggested try to ensure they are placed in the right category.

- All suggestions are valid and should be written up.

- Limit discussion to those items that can be included in the Action Plan; *the time for placing blame and complaining has long passed.*
  - Review the suggestions
  - Summarize or condense where necessary
  - Make clarifications and corrections
  - Have the group confirm this is the content they wish to have in that category
Producing an Action Plan Cont.

- *When you reach the Actions category remember to review with the participants the potential solutions and action steps that were suggested at the previous meeting.*
  - Are they still relevant?
  - Do they fit with the rest of the Action Plan?

- The group defines:
  - the action
  - the entity responsible for undertaking the action. *For example, is it something the neighborhood can do for itself or is it something a department of the City of Tulsa needs help with?*
  - Try to ensure there is at least an even division of responsibilities.

*There are many steps the residents of a neighborhood can take on their own to improve the neighborhood and often these steps are achieved quicker and with greater empowerment and benefit to the neighborhood than steps assigned to the City or to a local institution.*

- The only accomplishments of the Action Plan that can be guaranteed are those undertaken by the neighborhood residents
  - if they are committed to the success of the Action Plan
  - willing to see it through

*The group cannot realistically expect the other entities to fulfill all their requests.*

- Explain to the participants:
  - Undertaking periodic, visible projects shows City officials and others the neighborhood is committed and therefore deserving of support.
  - Take the initiative and search out developers or others who might like to do a project that meets the needs of the developer while implementing some piece of the plan.
  - Be realistic in expectations but allow the opportunity to think big.
  - Creating this plan should be an empowering and positive experience for the neighborhood.

- Ask the group to suggest possible funding sources.

*If the group wishes to do so following the Academy they could attach cost estimates to the strategies and action steps to assist in the decision making of themselves and others.*
Producing an Action Plan Cont.

Once all the categories have been covered and confirmed by the group undertake a final review, thoroughly describing the plan and the contents of each category.

- Allow time for clarification and comments if there appears to be confusion or disagreement.
- Explain: the Action Plan will be typed up into a two-page (if possible) document and both paper and electronic copies will be given to the Neighborhood Representative and alternate.

- It will be their responsibility to distribute the plan to the neighborhood and other relevant people and agencies.

- The plan will include:
  - Cover Page
  - Table of Contents
  - Introduction.

If there are any discrepancies or disagreement with the contents, layout or appearance of the plan once it is produced it will be up to the group to bring that to the attention of their Representative who will have the ability to make changes.

The cover page will include a map, photograph or sketch of the neighborhood. The introduction will include information on the Academy and how the Action Plan was created. The names of the participants who helped create this plan will also be listed.
Meeting Review

- Remind the Neighborhood Representative and alternate and the rest of the participants of their responsibilities going forward.

- Participants are responsible for:
  - Providing support to Representative
  - Assistance to the Representative in fulfilling their role
  - Doing all they can to ensure the plan is promoted
  - Implementation of plan in their neighborhood

- Ask the participants if they would like to schedule the next meeting of the group.
  - The Academy process has been completed
  - It is now the responsibility of the group to organize future meetings and plan for the future.

- Thank group for its participation and commitment to the Academy.

- Hand out the Meeting Four and final evaluation sheets and allow the participant’s time to complete them.

- Hold the drawing.
Final Meeting
Final Meeting

Agenda

DATE:
TIME:
PLACE:

9.00M Background

9.05M Meeting Four Review

9.35PM Academy Evaluation

11.00PM Adjourn
Meeting Five
Recap & Evaluation

Background

- **Today’s meeting**
  - Held after Meeting Four
  - Meeting Five: Final meeting of the Academy. The meeting is designed to review Meeting Four; put the Action Plans together for dissemination to the Neighborhood Representatives and alternates
  - Thank the facilitators for their participation and hard work
  - Collect evaluation of the Academy process.
  - Meeting should last approximately 2 hours
  - Thoroughly review of Meeting Four and the entire Academy process

- **Meeting Four Review**
  - Turn in NPA materials created at Meeting Four (the Action Plans and any other notes they may have taken)
  - Share with staff and the other facilitators how the meetings went
  - Review the levels of attendance
  - Hand-in the sign-in sheets
  - How many participants were at their meeting
  - What they thought about the number – too many, too few, the right amount.
  - Were there more or less than at previous meeting(s)?
  - Why do they think the numbers have changed?
  - What things can be done to increase the attendance?
  - How do you deal with a larger group?

- **Nature of participation**
  This will lead again into a discussion on the nature of the participation. Was it easy to get people involved? Were some more dominant than others? As well as describing the group dynamics, the facilitators and staff will have the opportunity to share any tips for dealing with certain situations that have not arisen previously or we have not reviewed in depth before.

  Discuss the ground rules. How were they received? Were any changes made to them? Have the facilitators been comfortable with them and with enforcing them during the Academy?
Meeting Five

- While this discussion is occurring other members of staff will have received from each facilitator the Action Plans.

- The staff will add a cover page, table of contents and introduction.

- The Action Plan will be cleaned up, condensed and summarized where necessary.

- Each Action Plan will then be put together and enough copies printed for the Neighborhood Representative and alternate to disseminate to the rest of the participants.

- An electronic copy will be provided. These items will be available for pick up at the school next week.

- Staff will study the Action Plans to look at similarities or differences across the city in the nature of the plans.

- Discuss did the development of the Action Plan go with the participants.
  - Were there areas of disagreement or strong agreement?
  - What areas caused the most discussion?
  - Was it overall a smooth process or was it a difficult process?
  - Why do you think the process was smooth or difficult?
  - Did it appear that the majority of the group accepts the plan and their responsibilities in it?
  - How likely do you think it is that the group will continue to meet and implement the Action Plan?
Meeting Five

Evaluation

- Review of Meeting Four should lead into an overall review of the entire Academy process.

- The following questions may be asked although the discussion should be allowed to flow naturally and cover those topics which seem significant to the facilitators.

1. Overall, did you enjoy the Academy process?

2. Were you taught all the skills necessary to lead the Academy? If not, what was missing?

3. Would you do this or something similar again if given the opportunity?

4. What were the most challenging aspects?

5. What were the most rewarding aspects?

6. What areas of the Academy need improvement or adjustment?

7. What valuable new skills have you learnt that may help you in the future?

Staff may then have some results and evaluation comments of its own that they wish to present.

- Finish this final meeting by thanking the facilitators for their participation and commitment to the process.

- They will also receive a copy of the Action Plan created by their group.

- Inform the facilitators that they will be contacted regarding a graduation day and other events related to the Academy.
Appendix A
PowerPoint Presentation
Background

- Began in fall 2006 to research neighborhood planning in the US. Chose to explore a neighborhood planning academy.
- Developed a curriculum of 7 lessons to teach neighborhood leaders how to plan and get organized.
- Collaborated with the Coalition for Community Schools to hold a series of focus groups with neighborhood leaders surrounding Community Schools in Tulsa.
Background

• The focus groups were used to introduce neighborhood planning and the work of the studio, and to obtain feedback on the curriculum.
• The result of the focus groups and further research and collaboration is the Neighborhood Planning Academy we are presenting today.

Focus Group Findings

1. “One-size fits all” academy is of little use, every neighborhood has different needs, desires, concerns, levels of experience and understanding. The academy must be flexible enough to meet the needs of the neighborhoods it is serving.

2. Shared need and desire from neighborhood groups to learn how to plan, organize themselves effectively, develop leadership, and increase their participation. But, 7 lessons with assignments is too many and too much to commit to.

3. Significant interest in the Comprehensive Plan update and neighborhood involvement. Idea to organize the city using the enrollment boundaries of the elementary schools was outlined in a White Paper and presented to the Comprehensive Plan Steering Committee.
Goals

1. To create a more meaningful role for neighborhoods in planning and decision-making processes that affect them.
2. To educate neighborhoods on their roles and responsibilities and empower them to organize and accomplish their goals, as a result building pride in communities.
3. To encourage understanding and collaboration across neighborhoods and with schools, experts and city officials.

Outline

Location: Community Schools
Taught by: Teachers trained by the OU Urban Design Studio
Attendees: Neighborhood leaders from Community School neighborhoods
Number of Meetings: 4
Length of Meetings: 2 hours (6-8pm)
When: May 13th & 27th, June 10th & 24th, 2008 (tentative)
Day: Tuesday evenings
Meeting One: What is Your Neighborhood? Definitions & Organization

Objective: focusing on the neighborhood as a spatial and social unit. Participants will be asked to think about their neighborhood as a bounded area; how they view and use their neighborhood; and how the neighborhood is organized.

Goal: to get the participants to establish the boundaries and makeup of their neighborhood. To consider neighborhood organization as it exists and areas for improvement.

Teaching: cover the differing definitions of neighborhood to get the participants thinking about how they would define their neighborhood. Outline methods for organizing neighborhoods.

Activities: Mapping Exercise
              Group Survey

Meeting Two: Viewing Your Neighborhood With a Critical Eye

Objective: focusing on the important issues or areas of concern in the neighborhood. SWOT analysis will be taught to be used as a group planning tool for neighborhood analysis and evaluation.

Goal: to encourage the participants to survey their neighborhood critically using SWOT analysis.

Teaching: cover the method and use of SWOT analysis to encourage the participants to see those areas in their neighborhood that could be improved through planning.

Activity: SWOT Analysis
Meeting Three: Developing Priorities

Objective: focusing on the top priority to be addressed in the neighborhood action plan. The group will prioritize the results of the SWOT analysis and discuss possible solutions to the top issue. A neighborhood representative will be nominated, via a democratic ballot, to take the action plan forward.

Goal: to encourage the participants to get organized and work together as a group to agree on the representative, the top concern and possible solutions or alternatives.

Teaching: cover methods for prioritizing neighborhood concerns and electing a representative.

Activity: Prioritizing and developing solutions

Ballot to nominate neighborhood representative

Meeting Four: Producing an Action Plan

Objective: focusing on the contents, packaging and final production of an action plan. An action plan for the top priority in the neighborhood will be produced.

Goal: to ensure the participants know the steps in producing an action plan and are able to follow them in creating future action plans.

Teaching: a simple step-by-step process to producing an action plan will be outlined.

Activity: Producing the neighborhood action plan.
**Schedule**

- Winter focus group → Dec 2007
- Lessons completed → Dec 2007
- Sign-up teachers → Apr 2008
- Obtain materials → Apr 2008
- Training event for facilitators → May 2008
- Neighborhood Planning Academy → May/Jun 08
- Graduation Day → Aug 2008

**Results**

- 11 Action Plans addressing top neighborhood concern
- A structure for neighborhood planning and active neighborhoods
- 1 community nominated representative
- Overview of the major concerns in each Community School neighborhood
- Potential pilot project for the City of Tulsa’s Comprehensive Planning effort
- 14 local teachers trained to facilitate neighborhood planning sessions
Appendix B
Logic Model
Neighborhood Planning Academy Logic Model
Anna Grider, University of Oklahoma
Shawn Schaefer, University of Oklahoma
Curt Adams, University of Oklahoma

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Components</th>
<th>Outputs</th>
<th>Linking Constructs</th>
<th>Outcomes</th>
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<tbody>
<tr>
<td>Funding</td>
<td>Teacher facilitated</td>
<td># of trained teachers</td>
<td>*Structure for neighborhood planning and active neighborhoods</td>
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<td>Personnel</td>
<td>Network Building</td>
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<td>*A community nominated representative *Promulgation of major neighborhood concerns</td>
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<td>*Action Plans addressing neighborhood concerns</td>
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<td>Resources</td>
<td>SWOT Analysis</td>
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<td></td>
<td>Issue Identification</td>
<td># of issues identified by neighborhood; total # of issues identified; selection of neighborhood representative</td>
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<td></td>
<td>Action Plan Formulation</td>
<td># of action plans; 3 of action plans presented to city council</td>
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Short Term Goal
- Increased neighborhood commitment

Intermediate Goal
- Social network development within the neighborhood
- Foster social capital within the neighborhood

Long Term Goal
- Transformative network environment
- Changes in quality of life indicators

Neighborhood Environment