The Volunteer Organization Handbook

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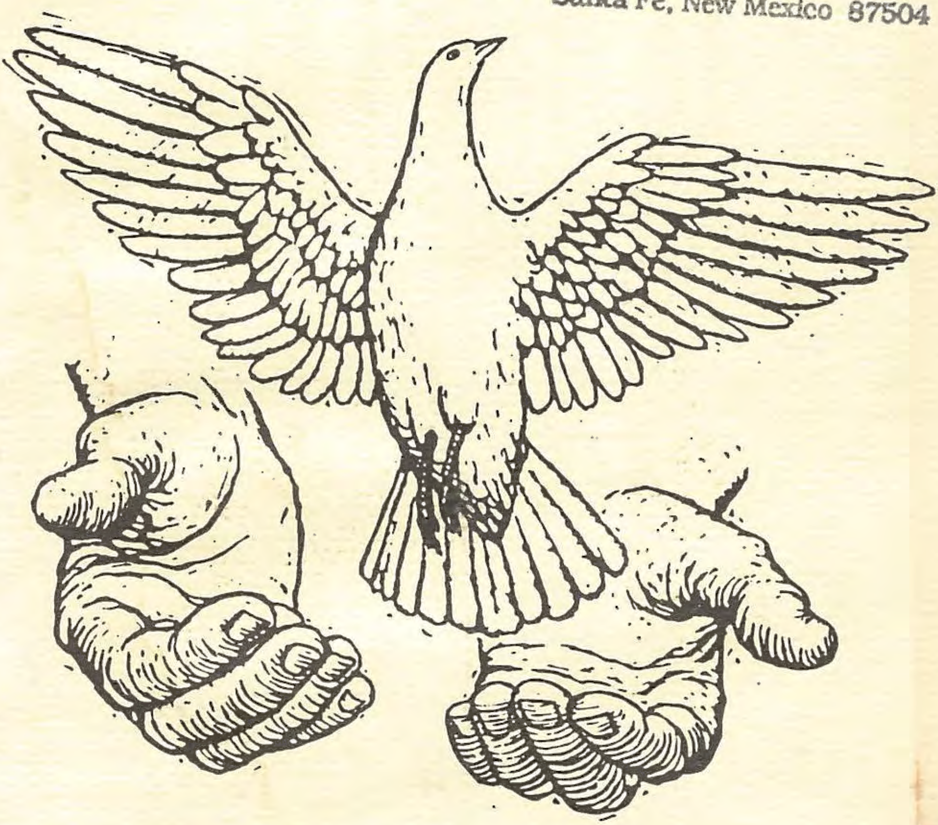

by
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INTRODUCTION

This book is for you if you want to be a more effective volunteer leader. The first five chapters are designed as self-instruction guides which, followed step by step, will help you lead groups to more effective action. The remaining nine chapters focus on topics to help you with specific problem situations and concerns.

We have had extensive experience conducting local, state, and national training for volunteers interested in effective group action. This book contains the best of these training materials and much that we have learned from participants in the training sessions. After years of experience, we have concluded that volunteer leaders can learn on their own much of what they need to know. We hope this book will help you and your group to become increasingly effective in implementing projects and activities.

The Authors

STEPS IN EFFECTIVE ACTION

1. Assessing Group and Community Needs

A logical first step in deciding upon an activity for a volunteer group or community is to identify and assess needs. The process is important for two reasons. First, it will help your group choose from among the many problems, issues, and challenges that it considers important and, at the same time, has the interest and support of members. Equally important is a realistic assessment of the adequacy of group resources for the task it selects.

There is a variety of techniques for assessing group and community needs. You may contact individuals or groups directly and ask them about needs and problems. Interviewing community leaders, holding public meetings, and contacting people faced with a particular problem are examples. You may decide to use information already available such as census data, statistics, reports, and previous studies. Two of the most widely used methods are (1) nominal group process, and 2) needs survey. Both are simple in design, although a number of variations and refinements exist.

Nominal Group Process

The purpose of nominal group process is to identify and rank group issues, concerns, and needs. It takes 60 to 90 minutes to complete and includes the following steps:

1. silent generation of issues, concerns, or needs;
2. round robin listing of items;
3. discussion of items;
4. preliminary voting;
5. discussion of voting; and, if needed,
6. a final vote.

For maximum effectiveness, limit participation in the process to a dozen or fewer people. When larger numbers participate, sessions tend to become too long, and the level of individual involvement reduces. Generally, two or more groups working simultaneously produce better results than one large working group.

Begin the process by asking participants to be seated around a table or in a circle. Allow time for introductions if any group member is not known to all other members. Explain the process and how the group will work through it. This step will lessen the anxiety of participants who may expect the activity to be complicated and uncomfortably demanding. With index cards, pencils, newsprint, a marking pen, and masking tape,or a chalk board, chalk and eraser on hand, proceed with step one.

Step 1: Silent Generation of Issues, Concerns, or Needs

Give everyone an index card and pencil. With a reminder to work independently, ask participants to list needs and issues of most concern. (You may focus on group or community needs.) Encourage participants to be brief and specific. There is no limit to the number of items they may write on a card. Some will list only three or four; others will list a dozen or more. Encourage them to write as many items as they wish. In fact, when one card is filled, offer the person another. Maintain an atmosphere in which everyone can write without interruption, competition, or pressure toward conformity. This first step should take about 10 minutes.

Step 2: Round Robin Listing of Items

The product of the round robin is a list of all items from the index cards. To get the activity underway, ask one person to state a need or concern from her/his card. Record it on the newsprint (displayed where everyone can see it) and ask the next person for one item. Continue the process in a round-robin manner. Go around the group as many times as needed to get all items listed. Do not worry about apparent duplication.

As a newsprint sheet is filled, tear it from the pad and tape it in a prominent place on the wall. Tip: Assign a number to each item as you write it on the newsprint. This will make it easier for group members to refer to items later. Also, it takes less time to refer to numbers than to read the items. This second step should take about 30 minutes and is the longest of the six steps.

Step 3: Discussion of Items

This step allows group members to seek elaboration or clarification of any item on the newsprint sheets, and also to look for duplications. In regard to the latter, do not eliminate any item unless there is general agreement that it does indeed duplicate another. When in doubt, it is better to leave an item on the sheet. During discussions to clarify items or elaborate on them, you may find that some originators of specific items want to go beyond clarification and elaboration and attempt to convince group members of the importance of the item. You can minimize such situations by agreeing in advance that discussion will be brief. Step three should take about 15 to 20 minutes.

Step 4: Preliminary Voting

This step is called "preliminary voting" because a final vote may be taken later (step six, which is optional). It allows members to vote for items they consider most important. Before voting begins, decide how many votes each person may cast. Everyone must cast the same number of votes. A simple guide: If there are fewer than 25 items, let each person vote on three; if there are 25 or more items, let each person vote on five. Ask participants to list on an index card the numbers of the items for which they are voting. Following the round-robin procedure, have each person identify one of the items for which she or he voted. After everyone has indicated one item, go around the group to get second votes. Continue the activity until the three or five votes from each member have been recorded on the newsprint sheets. A mark placed beside the number of each item as it receives a vote is an adequate voting record. This step should take 10 minutes or less.

Step 5: Discussion of Voting

A discussion of preliminary voting usually focuses on items receiving three votes or more. Some items will receive one or two votes or none. Remind group members that this does not necessarily reflect on the importance or value of the particular item. There may be many reasons why it received few or no votes; e.g., it is beyond the group's resources or is receiving the attention of another group.

Preliminary voting generally reduces an original list to a dozen or fewer items that received three or more votes. Focus your discussion on these. They represent the needs of most importance as perceived by the largest number of members. During the discussion, give particular attention to those few items receiving the highest number of votes. If one or two items clearly stand out above the rest, direct discussion toward these items. This discussion will take from 5 to 20 minutes. If more than three items received a large number of votes, or if the votes were widely scattered, proceed to the final step of the nominal group process.

Step 6: Final Vote

In this step, group members vote only on those items receiving three or more votes in the preliminary voting. If the group wishes, it can limit voting even more by voting only on those few items with the highest number of preliminary votes. This step should take only a few minutes and will help bring the group to general agreement on the need or needs to receive its attention at a later date.

In summary, the nominal group process, a kind of needs assessment, allows group participants--individually and collectively--to identify what they consider the most important issues, concerns, or needs of the community or group.

Needs identified through this process represent the best thinking of participants. Additionally, the information it provides has group support because every group member participated fully in the process.

Needs Survey

Before undertaking a needs assessment survey, your group should ask itself these questions: Is the information we seek already available? Are we clear on the reasons for a needs survey? Will we make use of survey results? A survey takes time, money, and other resources. If the information is already known and available, there is no need to conduct a survey. An equally wasteful use of your resources would be conducting a survey without a clear idea of why. If your group determines that there is a lack of information, it must also determine if a survey is the best means of obtaining it. Finally, its leaders must foster an expectation among group members that survey results will form the basis for subsequent group action.

Preliminary consideration of whether or not to conduct a survey is important because the process usually takes more time and work than group members anticipate. To get group commitment to the survey process through its completion, members must understand it. Explain what is involved. Be sure everyone knows what to expect if the group moves ahead.

Before you can actually plan the survey, you must determine what needs you want to assess and whom you want to ask about them. You may want to look at a specific need (e.g., lack of a summer activities program for young children); a broader spectrum of need (e.g., youth unemployment); or at the needs of a particular segment of the population (e.g., elderly). Use of the nominal group process is a good way to identify one or more community needs of particular concern to your group. If you use it, your next step is a needs survey to give you more specific information about the need. Involve many people beyond the membership of your group in this survey.

Your group may be a local unit of a national organization that has a focus on a particular problem (e.g., delinquency) or a particular group (e.g., the elderly). If so, you may want to develop a local project with the same focus. Community needs may come to your attention in other ways. The important thing to remember is not to select a need just because one or two members say it is important. Neither should your group attempt to conduct a needs assessment that is so broad your group cannot manage it. A survey of community needs in general is not advisable because a community is too broad and diverse.

A needs assessment survey has four major steps:

1. planning the survey;
2. conducting the survey;
3. preparing and reporting the results; and
4. using the results.

Step 1: Planning the Survey

Once you are clear about the need to be studied, consider whom you will survey. Include those persons who are directly related to the need, as well as others who may influence the need or be influenced by it. If you decide to look at the needs of the elderly, for example, survey the elderly, persons serving the elderly--such as directors of senior citizen centers--and community leaders who make decisions that affect the elderly.

Another decision to make is whether your group will conduct the survey or employ others to conduct it. The answer depends in part on the time and abilities of the members of your group and the size and complexity of the needs assessment you have in mind. If you decide to conduct the survey yourselves, seek expert advice and consultation on the technical aspects of the activity. If there is a college or university in your community, you may be able to get help or advice from a member of the faculty. If you want this person to conduct the survey, and the person is willing, be sure to enter into a formal agreement so that tasks and responsibilities are specified and clear. Even if you employ a consultant, much work remains to be done by the group. This is good because it curtails expenses and involves members in the survey itself.

Other questions you need to answer during survey planning include:

What geographic area will the survey cover?

Will you attempt to contact everyone (total population) or a sample? If you decide on a sample, what sampling method will you use and how large a sample will you need?

What survey method will be employed (face-to-face interviews, mailed questionnaires, telephone interviews)?

Answers to these questions are beyond the scope of information that can be presented in this chapter. However, the questions indicate that if you do not have someone with survey research experience in your group, you must seek advice and consultation from someone with such experience.

Step 2: Conducting the Survey

The survey cannot be conducted until you have prepared and tested a questionnaire. Deciding what questions to ask and how to ask them requires much deliberation, but the quality of survey responses will be determined by the quality of the questions and how they are asked. Don't ask for any information you don't really need or you don't know how to use. Deciding this prior to making copies of the questionnaire and distributing the survey will save you time and trouble later. Developing a questionnaire is not simple, so be sure to get help from someone experienced in questionnaire construction. The survey instrument can make or break your survey.

Test the questionnaire before you conduct the survey. In other words, have a few people complete the questionnaire, and then ask them if they had any difficulty responding to the questions. If they did, adjust the questions accordingly. The more clearly the questions are stated, the more apt the survey is to produce useful information.

Questionnaires can be mailed, but to save money and time, you may want to deliver them to survey participants and pick them up a day or two later. Prepare local publicity to let people know about the survey and to encourage them to complete and return it or to grant personal interviews. You need to decide how to recruit and train survey helpers. For example, if interviews are to be used, helpers will need to be trained in interviewing techniques.

The secret of a successful survey is adequate planning before the survey begins and attention to details while it is being conducted. This means you must organize the activity to the extent that everyone has a clear understanding of who is responsible for what and when.

Step 3: Preparing and Reporting the Results

A major part of this step is tabulating findings and writing the report. You may find that you have more information than can be included. If so, someone has to decide what goes into the report and what does not. After this decision has been made, you must decide how to present the information. Some data can best be presented in tables. Other information should appear in simple narrative form. What to include and in what form can be determined more readily by the intended report audience. To whom is the report directed? For example, if you plan to ask other volunteer groups for help on specific needs, you may find it beneficial to give special attention in your report to needs they can meet.

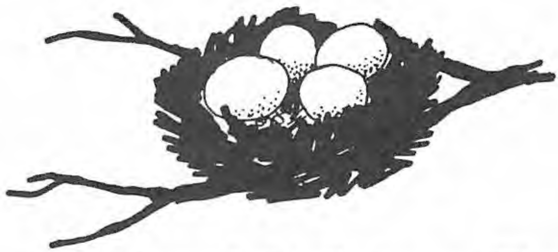
Reports should be brief and data presented in clear, readable form. If your report includes conclusions or recommendations, state them clearly and be sure they are based on survey results rather than the report writer's opinions. If the report recommends some action, it should also indicate who might carry it out if it is not to be carried out by your group.

In addition to a written report, public meetings may be a valuable way to inform others. Also, highlights of the survey could appear in local papers. You may even find yourself being interviewed on a local talk show. Remember that media coverage usually focuses on the part of a report which seems most newsworthy. This may not be the part you would have emphasized, and it may even give a distorted view of the results. Media people, however, are generally eager to work with you so that they get their story and at the same time you get survey information to the public and what you hope will happen as a result. One way to help insure that this will happen is to prepare news releases which tell your story.

Step 4: Using the Results

Reporting survey results is actually the first step in using the results because it makes the information public knowledge. This in turn may attract interest and unexpected support of the needs identified. It may also lead to help in implementing your recommendations. A point to consider is that most needs can be met in a number of different ways or in a number of combined ways.

In other words, although you have identified a specific need, your group still has the job of determining how it plans to respond to that need. Assessing needs is only the first step to improving communities and organized groups through planned action. The next step is to use the results of the needs assessment to establish goals and set priorities. Both nominal group process and a needs survey are appropriate techniques to identify needs on which effective group action may begin.



2. Establishing Goals and Setting Priorities

Goals

What a group plans to achieve is an important part of its goal statement. But even more basic, and often overlooked as a part of the statement, is why. If the answer to why is "because it's a good project," or "because we've always done it that way," your group needs to think more intently about the beliefs and values that prompt its choice. The aim of this chapter is to call attention to the importance of considering why your group is choosing a course of action.

Techniques

Brainstorming is a technique commonly used to establish goals. In it, people are asked to express their ideas quickly and spontaneously while the leader records them on a chalk board or sheets of newsprint in full view of participants. The authors once observed an effective use of brainstorming in a town hall meeting on community improvement. The why or philosophical aspect of the goal was implicit and might have been stated as: "Because we appreciate our community and want to make it an even better place in which to live, we are meeting to establish goals for community improvement." Initially the chairperson asked the group, "What do you like about our town?" As people responded, she wrote their replies on sheets of newsprint. Next she asked, "What can we do to make our town even better?" Responses included: "Tear down the vacant building between the post office and the hardware store and create a mini-park;" "Start a meals-on-wheels program;" "Conduct a retail trade survey;" "Expand the library hours," etc. As these suggestions were made, she also wrote them on sheets of newsprint, separating them into categories which she later labeled as physical, human services, economic development, and cultural/recreational. Next she asked people to select the category in which they were most interested, and to form categorical groups. Then she asked each group to determine goals and objectives for its chosen category. As a result of the workshop exercise, the community had not only articulated goals but also was off to a good start in determining objectives and implementing action.

Some groups determine goals by analyzing needs identified through nominal group process or a needs survey. A technique perhaps less well known is <u>model coherency</u>. It involves establishing a model of what a group wants to do and then making group action conform to, or be coherent with, the model. The technique, which goes beyond determining goals, integrates needs assessment, goal formulation, and development of an action plan. It involves six steps:

1. Identification of people to be served
   a. Who are the people we wish to serve?
2. Identification of need
   a. What are the people's needs?
3. Identification of goals
   a. What should we do to meet the people's needs?
   b. Why should we be involved?
4. Description of current activities
   a. What are we presently doing?
5. Development of goal-directed plan of action
   a. How do we get from #4 to #3?
6. Development of measurable objectives
   a. How much is to be done?
   b. Within what period of time?
   c. With what results?

Model coherency is a technique which makes a very strong link between affirmation and performance; it encourages a group to do what it says it will.

One of the problems with goal formulation is that sometimes the group establishing goals understands a problem or a need only from its own point of view. This is especially true when a group of people who have similar backgrounds and interests attempts to establish goals for another group. The following case study illustrates the problem:

A group of high school principals, concerned about a high student dropout rate in their area, asked a consultant to help them analyze and solve the problem. In discussing the issue, they stated their belief that school dropouts tended to come from: (1) single-parent families, (2) low-income families, and (3) families in which students received little parental encouragement. When the consultant interviewed some of the former students, they gave two reasons for leaving school: (1) They had been labeled by teachers and school administrators as low achievers. (2) The education they were receiving didn't seem relevant to them.

Based on their assumptions, the principals might have stated their goals like this: "Because we believe every person should be given an opportunity to develop to his/her fullest potential, and because we believe a high school education is an important means to that end, our goal is to develop a system for reducing the number of high school dropouts in this district."

After gaining information from the dropouts, the goal might have been modified as follows: "Because we believe every person should be given an opportunity to develop to his/her fullest potential, and because we have been charged with the responsibility of helping young people achieve their potential through public education, our goal is to provide for each student an educational program which enhances self-esteem and is relevant in developing individual potential." In this example, the goal was modified when the needs of the persons to be served were understood from their point of view.

Whatever technique is used to formulate goals, they should be based on the needs of the group to be served. Since the people to be served are usually the best experts on what they need, they should be involved in the needs assessment.

Relevancy

Establishing goals is an on-going process because needs and conditions change continuously. Sometimes groups must change their goals as a result of conditions imposed from the outside. Generally, the group has no control over these. The following example describes an agency that successfully shifted gears in response to changing attitudes and conditions:

Madonna Home existed for many years as a long-term care home for children without families. Social attitudes, however, began to change and finding permanent homes for children became a national goal. The board and staff of Madonna Home, alert to societal change, examined their goals and programs, and adopted new goals consistent with contemporary philosophy. As a result, program directions changed, and Madonna Home became Madonna Family Services Center. It now provides temporary care for children from families in crisis, offers short-term housing for unmarried mothers and their babies, conducts parenting programs, and serves as a placement agency for children needing adoptive families. In this example, an organization analyzed changing attitudes and conditions and altered its goals to attain greater relevancy to the changes.

Sometimes a group must examine the effect of changing circumstances on its members and adjust organizational goals and behavior accordingly. For instance, women's groups may succeed or fail depending on their willingness and ability to change group goals to meet needs of inceasing numbers of women who work outside the home.

Every group needs to schedule time at least once a year to reassess its goals. Part of that time should be devoted to discussing changes that have occurred and anticipated changes which have or may have an impact on the group. A group must be alert to changes if it is to continue to be relevant to its members and the community.

Conflicting Goals

One of the problems in establishing goals is that some individuals within a group, or the group itself, may subscribe to some goals that are in conflict. For example, a community may want economic development, but not want population growth. Group members may want more services from their organization, but not a dues increase. Or an organization's leaders may want to develop leadership within their group, but not want to give up any of their own leadership functions. Sometimes a group is aware of such conflicts. In this case, the conflicts need to be confronted and choices made. The process is seldom a simple one, but the health of any organization is in large part dependent upon its willingness to confront and resolve conflict. At other times the group may be unaware of conflicts. In such cases, "ignorance is not bliss." The group must scrutinize its statements and its behavior to determine if there are inconsistencies which must be resolved before goals can be attained.

Experiencing goals that are in conflict may result in group frustration and impotence. On the other hand, if your group recognizes the conflict and agrees to make choices, it can move forward.

Priorities

Once goals have been established, it may be necessary to group and rank them. Which goals are most important? Which are short-range? Which are long-range? Which should be addressed first? Which must be delayed until others have been achieved?

Sometimes priorities are established through discussion and consensus arrival; sometimes nominal group process is used. Another technique for establishing priorities is paired weighting (Chapter 10, p. 109). This technique requires thoughtful, independent participation by every member of the group, just as nominal group process does. The unique characteristic of paired weighting is that it necessitates comparing each goal with every other goal, one at a time. For example, assume that a school board has the following goals and must decide on priorities:

1. Establish a system of merit pay for teachers and school administrators;
2. Replace half of the school buses;
3. Provide program resources to integrate Indo-Chinese stu-

dents, a new population group in the community;

4. Respond to an appeal from the Music Boosters Club for new musical instruments; and

5. Develop a plan for improving the athletic field.

The paired weighting technique requires that each board member, working independently, compare #1, "Establish a system of merit pay for teachers and school administrators," with #2, "Replace half the school buses," and circle the number which is more important. Next, #1 is ranked in relationship to #3, and so on through #5. After comparing #1 with every other number, #2 is similarly compared with #s 3, 4, and 5. The process continues until every number has been systematically compared and ranked in relationship to every other number. After each member has completed the ranking process, results are tallied and group priorities thus established.

Establishing priorities does not necessarily imply that a group must focus all of its attention on its first priority before moving to the next. It may be quite possible to work toward the attainment of several goals simultaneously. On the other hand, it may not be possible to attain some goals until others have been achieved. For example, a group's goals may include building, decorating and furnishing a new facility. Obviously the structure cannot be decorated and furnished until it is built. However, while one sub-committee is working with contractors, another may be planning the decor, and a third may be choosing the furnishings. The work of all sub-committees must be closely coordinated.

It is important for a group to establish consensus on priorities.

Such action will give the group a clear sense of direction, help avoid confusion, and provide a foundation for measuring accomplishment. It is also a necessary prelude to determining objectives.

In summary, whatever technique your group uses to determine goals, why you are embarking on a course of action must be considered as well as what action you wish to take. Furthermore, goals must be based on needs; and, if at all possible, the people to be served should have an opportunity to express their needs. In addition, a group must be alert to changing conditions and willing to modify its goals to ensure relevancy to the changes. It is also important to remember that conflicting goals need not result in frustration if your group will recognize conflict and resolve it through relevant choices. Finally, in order to determine measurable objectives, you must first establish priorities.

3.

Considering Alternatives and Determining Objectives

Although your group has now established goals, it is not quite ready to get to work. Two important steps intervene: (1) considering alternative courses of action, and (2) determining objectives.

Considering Alternatives

You may want to begin this step by brainstorming (Chapter 10, page 101), a technique which gives creative thinking priority over the practical. Its point is to get before a group every possible course of action or idea a member can suggest, with no thought as to how feasible each one is. Ideas are expressed briefly, with no background or justification, and as rapidly as they can occur and be recorded for all to see. The brainstorming session is free-wheeling and uninhibited, and the group leader does not evaluate suggestions in any way or allow group members to do so.

After all ideas about alternative courses of action have been recorded on a chalk board or newsprint, the group discusses and evaluates each suggestion.

Consider four questions when choosing an alternative:

(1) How manageable is it?

(2) How appropriate is it?

(3) How can we get approval of legitimizers? and,

(4) What are the risks?

An alternative is manageable if your group has the time, resources, and skills to carry it out successfully, or can acquire some or all of them.

An appropriate alternative is timely, consistent with your group's purposes and goals, and planned in relation to what other groups are doing. For example, the National Congress of Parents and Teachers Association (PTA), an organization concerned with how children's behavior is influenced, once undertook a study of the effect of TV violence on children's attitudes and behavior. This was appropriate action for the PTA.

Timeliness is important, too. For example, planning a project to welcome newcomers and integrate them into community life would be very timely when substantial community growth is expected. Awareness of what other groups are doing is also a factor in determining appropriateness. If two or more groups are planning or are involved in similar projects, they might want to share information, work on different phases of the issue, or pool efforts in a joint venture.

The following case study illustrates several aspects of the first two considerations in choosing an alternative (manageability and appropriateness):

An affiliate of the General Federation of Women's Clubs (GFWC) in a small town took on a project to improve the village park, a project that could involve the total community. Plans were made to hold a work day in the park. The event was widely publicized and held on a Saturday so children could also help. All farm families in the area were called and invited to participate. Representatives from the steering committee went to the school to talk about the work day. The steering committee outlined many projects and asked people to sign for the ones that interested them. Ground was tilled; trees were planted; playground equipment was built, painted, and put in place; flower beds were started; picnic tables were constructed; and work was begun on a foot bridge. Everyone helped--men, women, children, persons with mental retardation, senior citizens, townspeople, and farm families.

The club was small, and its steering committee had only six members. Clearly, they alone could not manage involvement of the total community in an improvement program. Therefore, they began by choosing an initial project which was highly visible and one in which everyone could participate and from which everyone could benefit. They took great pains to invite participation, giving special attention to children and rural residents. They planned so that people could be involved in the immediate project, and also solicited their commitment to more long-range goals. They did so by: (1)

allowing time at the potluck luncheon in the park for people to share ideas about their town and community improvement, and (2) deliberately starting some activities which could not be finished during the work day; e.g., "flower beds were started . . . and work begun on a foot bridge."

The group recognized that all of the time, resources, and skills necessary for successful participation in the community improvement program did not exist within the club itself, but that the effort was manageable through total community involvement.

As well as being manageable, the club's action was appropriate. First of all, one of the thrusts of the GFWC is community improvement; so the local group's action was in harmony with federation goals. Secondly, the project was timely. The village park had not been adequately maintained and little development had taken place. The work day was planned for early spring so that people could enjoy the new plantings and equipment during the summer and fall. Furthermore, the women's club sensed that the community was ready for an activity that would produce positive results and promote pride. Third, no other group within the community was involved in park restoration and development. By emphasizing that the park was a community project, rather than a women's club project, and that everyone was invited to participate, cooperation from individuals and other groups was easily achieved.

The club's assessment of the manageability and appropriateness of the project was affirmed not only by the community's enthusiastic involvement, but also at the state Community Improvement Program

Recognition Day when the town won first place in its population category.

A third factor to be dealt with in considering alternatives is gaining the approval of legitimizers, those community people who have the influence or authority to affect group action. The authors once knew a young woman who was employed by a state corrections department to develop and implement a model for a community-based corrections program in a multi-county region. Although she was committed to the program's philosophy, and eager to develop the plan, her first step was to arrange individual interviews with all area judges and principal law-enforcement officers. She needed--at the very least--their understanding, and--at best--their blessing. Her efforts to communicate with the legitimizers and gain their involvement and approval were successful. One judge said, "I am grateful that I learned about this through our conversation as opposed to reading about it in the papers."

Gaining approval of legitimizers is not always possible. This does not necessarily mean, however, that you should give up your project. If you believe that the group goal is a worthy one, you may decide to persist despite the opposition of one or more of the legitimizers. You should also realize that some efforts require more than one attempt to accomplish. Bond issues, for example, sometimes fail on the first vote, but succeed on the second or third.

Dealing with risks is another obstacle your group may need to overcome. Group members usually tend to be rather polite in responding to each other's suggestions. As a result, a group sometimes fails to express concerns it may have about a member's suggestion. This can be prevented if group climate makes it okay to express doubts and reservations about proposals before any decisions to act are made. One way of doing this is to use the risk technique (Chapter 10, page 102). It creates an open climate for considering both negatives and positives, helps a group to anticipate and discuss problems and means of dealing with them, and may result in the group's avoiding actions which prove to be too risky. The risk technique involves:

(1) asking each member to express any misgivings about a recommendation for action;

(2) suggesting that the group select the one or two most serious risks; and

(3) directing the group to develop a plan to overcome these risks.

After your group has chosen an alternative, having considered manageability, appropriateness, approval of legitimizers, and risks, it is ready to determine objectives.

Determining Objectives

The goal, you will recall, states what action you want to take and why. Assume that your group is embarking on a project to help adolescents who are having school problems because of poor reading skills. You have worked closely with the junior high principal, an important legitimizer, who has documented the need and endorsed the project concept. Your goal might be stated as follows:

"Because we believe that every person has a right to develop to his or her fullest potential, and because, in our society, reading skills are essential for most people to achieve their potential, we will sponsor a project for those junior high students in our community who have reading problems."

Your group has considered several alternative courses of action designed to achieve the goal. The alternative chosen was to utilize senior- citizen volunteers to tutor students on a one-to-one basis. The objectives should address:

(1) How much or how many?

(2) Within what period of time?

(3) With what results?

Your objective might be stated as follows: "To recruit, train, and reinforce 10 senior citizens who will meet on a one-to-one basis with 10 students for a minimum of one hour, three times each week between October and May, for the purpose of raising each student's reading level by two years."

This objective relates to the questions in the following manner:

(1) How much or how many?

(Recruit, train, and reinforce 10 senior citizens who will meet on a one-to-one basis with 10 students...)

(2) Within what period of time?

(...between October and May)

(3) With what results?

(...for the purpose of raising each student's reading level by two years.)

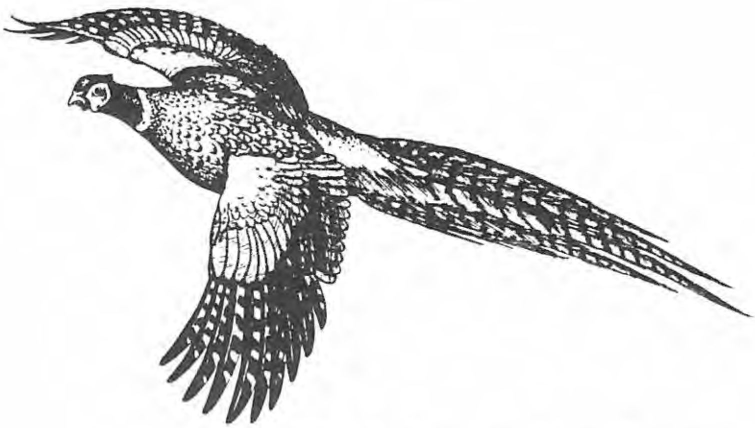
You may be asking yourself: But how do we know how much or how many resources will be needed, and how much time it will take to achieve a given result? To answer this, ask: What results do we want to achieve? Then ask (1) Has the need been clearly identified and carefully documented? and (2) Can we make a contribution which is significant enough to give us a sense of accomplishment?

In regard to the latter question, consider whether the expected accomplishment is reasonable for your group, or if it will be more trouble than it is worth. Fund-raising projects sometimes result in such feelings. And that may be due to vague objectives; e.g., "to raise money for the scholarship fund." But what amount and why? Answering that question--establishing a reasonable fund-raising goal --is really not so difficult if you carefully consider the other two questions related to achieving results: (1) How much time can you allow to complete the project? and (2) How much or how many resources do you choose to invest?

It is very useful to state objectives in quantifiable terms; however, doing so requires that you specifically determine what you want to achieve. Groups frequently try to move directly from good ideas to implementation, and then are puzzled when progress seems inadequate, members appear to hold different notions about what the group is trying to accomplish, or they can't seem to evaluate results. Such frustrations will be prevented if the group has clearly stated its objectives.

One word of caution. Some people believe that if you cannot measure objectives, they are not valid. The authors do not agree. You may have valid objectives which you simply don't know how to measure. If your group cannot quantify its objectives, use alternative ways of assessing progress and accomplishments. For example, you could hold regular discussions about how the project is moving along, or interview participants to see if they are satisfied with progress or have suggestions to make. If you clearly state goals and objectives before starting a project, whether they can be stated in measurable terms or not, it will be possible to chart progress, change action if objectives are not being met, and determine results.

After a group establishes goals, and before it acts upon them, it must consider alternative courses of action and carefully determine objectives. When considering alternatives, manageability, appropriateness, approval of legitimizers and risks must all be taken into account. When determining objectives, a group must make every effort to answer the questions: How much or how many? Within what period of time? With what results? Only then has the way been paved to action.



4. Taking Action

Once your group has established goals and objectives, it is ready to consider methods for action. The relationship among goals, objectives, and methods can be summarized as follows:

Goal:	Why? What?
Objective:	How much? How many? Within what period of time? With what results?
Methods:	How? Who? When? Where?

The central question in methods is: How shall we accomplish objectives and thereby achieve our goal? To answer this, develop an action plan which includes these steps:

(1) identify major tasks and mobilize resources,

(2) design appropriate structures, and

(3) establish target dates and construct a timetable.

When the plan is being acted upon, you will need to:

(1) adopt good management practices,

(2) keep people informed, and

(3) recognize and reward accomplishment.

Developing a Plan of Action

Step 1: Identify Tasks and Mobilize Resources

Begin by identifying the major tasks to be accomplished. Some groups may want to think of tasks sequentially; others may prefer to list all tasks, as one would do in brainstorming, and rank them later. As group members identify tasks, they often volunteer or suggest someone to carry out various assignments. In so doing, they identify human resources.

A good technique to identify tasks and maximize resources within the group is the mini-max (Chapter 10, page 104). With mini-max, members, working in groups of five or six, use index cards to list tasks to accomplish objectives. They then use separate cards to list things they like to do or can do that relate to the tasks. Finally, "tasks" and "things people like to do or can do" are matched. Mini-max is a good exercise to involve members in identifying tasks, uncover hidden talents, and create enthusiasm. Whatever technique is used, mobilizing human resources requires careful, conscientious matching of tasks and talents.

A key element in mobilizing human resources is effective recruiting. If someone in your group complains that "It's always the same few who do all the work," take a close look at your recruitment procedures. Recruiting is sometimes done in a very vague, lukewarm or negative way; e.g., the recruiter may ask, "Would you be interested in serving on the membership committee?" or "I don't suppose you would like to serve on the membership committee, would you?" A recruiter should not only exude enthusiasm, but also should be prepared to give potential volunteers information about the following questions:

(1) What is the task?

(2) What is the relationship of this task to the overall mission of the group?

(3) Why is it important?

(4) Why do we need you?

(5) How much time is involved?

(6) When does it need to be done?

(7) Where is it to be done?

(8) With whom is it to be done?

(9) Are any costs involved? If so, who is responsible? How and when will costs be paid?

Assume that the student-tutoring project discussed in the previous chapter has been successful and your group has been asked to write an article about it for a national magazine. You have carefully documented group action, so preparing the article is relatively easy. Nonetheless, because you want to submit a high-quality article, the group decides to ask Ms. Jones, a retired English and journalism teacher, to proofread and edit the final copy. The recruiting interview which follows might serve as a guide for you:

1. Q: What is the task?

   A: A national educational magazine has asked us to submit an article describing our tutoring project. We would like for you to proofread and edit the article.

2. Q: What is the relationship of this task to the overall mission of the group?

   A: The objective of the tutoring project was to improve the reading skills of 10 adolescents who were reading well below their grade level. Because the project was both innovative and successful, we have been asked to document our experience by writing an article. We have prepared the article and want to insure that it is submitted in excellent form.

3. Q: Why is it important?

   A: We hope that our experiences will be useful to other groups and communities. We want the article to be stimulating and technically correct.

4. Q: Why do you need me?

   A: We need you because you have expertise in proofreading and editing.

5. Q: How much time is involved?

   A: We believe the article is well-written and will require few substantive changes. We anticipate that the task will require no more than three or four hours.

6. Q: When does it need to be done?

A: We have been asked to mail the article no later than three weeks from today, so we hope that your task can be completed within the next two weeks.

7. Q: Where is it to be done?

A: It can be done at your home or at any place of your choice.

8. Q: With whom is it to be done?

A: You may work alone, or with the authors if that is your preference.

9. Q: Are any costs involved? If so, who is responsible? How and when will costs be paid?

A: No costs are involved.

When you recruit, avoid second-guessing (i.e., assuming you know what someone's response will be). Let people speak for themselves. For example, when Ms. Jones is suggested as an editor for the article, someone in the group might say, "Oh, she probably did that sort of thing for so long that she's tired of it." Or, "I heard she's going on vacation so I don't think she would have time." That's second-guessing. Ask Ms. Jones. She is the only person who knows whether or not she will accept the assignment.

Other important resources are previous studies, the newspaper morgue, the reference section of the public library, individuals with specialized knowledge, universities and colleges, Extension specialists, and other agencies and organizations. An exchange of ideas with other groups similar to yours, both within and outside the community, nearly always expands group thinking about available resources and how they might be obtained. Thus, when members attend state, regional, and national conferences, they frequently bring new ideas and inspiration to the group.

To insure a sound information base and develop group member skills, give careful consideration to what you want to know, think imaginatively about where the information might be available, carefully record and document sources of written information, and develop good interviewing skills. (Chapter 10, page 121).

Sometimes groups look too far afield for resources. Consider the following example of a community that wanted an ice-skating rink. Federal money was available for tennis courts so they decided to submit an application. If funds were granted, they would build a court, put a curb around it, and flood it in winter for skating. Upon investigation, however, they discovered that their share of the tennis court cost would be more than the cost of building the ice-skating rink. They withdrew their application for federal funds and did the job themselves. Money is a valuable resource, but be aware that its cost sometimes exceeds its value.

Facilities, supplies, services, equipment, etc., are also important resources. When your group approaches any task, it first should consider the resources needed, and second, the resources available. If more resources are needed than seem to be available, you can do one of two things: modify the project so it can be accomplished with available resources, or find additional ones. They are often available if you are creative in discovering them. For example, many communities have used facilities creatively by transforming unused school buildings into apartments, museums, or small factories. Good examples of imaginative use of materials may be seen on playgrounds where children play happily on equipment made of old tires or railroad ties.

Step 2: Design Appropriate Organizational Structures

Who should be involved? Can your project be done exclusively by group members? Should you form sub-committees? Do you need to recruit external talent? All of these questions must be answered as you form an organizational structure for accomplishing your objectives. If the task calls for a division of labor, and you form sub-groups, consider group size, and match qualifications of members with assignments.

To determine the size of a sub-group, keep in mind: (1) All group members should have an opportunity to help achieve group goals so they will develop a sense of ownership. This does not mean that every member is equally involved in every task, however. (2) The "principle of least group size" says that a task should be performed by the smallest number that can successfully carry it out.

When you choose members of sub-groups, select people who work well together. Include people from different backgrounds, points of view, or geographical areas. Consider personal interests, talents, and dependability. Appropriate choices of individuals will result in a better work product and greater member satisfaction.

There are members in every group who can be counted on to follow through with assignments. Consequently, the path of least resistance is to assign responsibility to these dependable individuals. This practice, however, does not develop new leadership. Therefore, it is wise to include in a group some new or less active members, along with one or two dependable experienced people to spread the work load and help develop new workers.

When assignments are made, clearly state the expectations of members, as well as: when, how, what, and to whom to report; whether the sub-group has been allocated any money, and, if so, what procedures govern expenditures; and, whether the sub-group has any relationship to or shared responsibility with any other sub-groups (See Chapter 8). Provide all of this information and the sub-groups will carry out their assignments systematically and responsibly.

Step 3: Establish Target Dates and Construct a Timetable

You will simultaneously identify tasks, mobilize resources, and establish structures. As the action plan begins to unfold, you will find it useful to establish a timetable, charting the steps in each process and identifying tasks and persons responsible for carrying them out. Begin by establishing target dates, those points when certain tasks should be completed. Look again at the tutoring project as an example (Chapter 3, page 29). The primary target date is the end of the school year, by which time objectives should have been achieved. Other significant target dates would be the completion date for recruiting volunteers, training volunteers, celebrating accomplishment, and evaluating results. A timetable for the tutoring project could look like this:

Project: Let's Read Together

Schedule	Task	Persons Responsible
July 1 - 20	Recruit 10 volunteers	Volunteer Recruitment Subcommittee
July 23	First meeting of volunteers and Human Resources Committee	Human Resources Committee
August 2	Volunteer training	Training Subcommittee
August 9	Volunteer training	Training subcommittee

The above illustrates the timetable for the first few weeks. Additional tasks would be scheduled from September to March.

The last two months might be as follows:

March, last week (date to be determined)	Meeting with volunteers to report progress and discuss problems and needs	Human Resources Committee
May, last week	Picnic with volunteers, students, club members	Human Resources Committee
June, first week	Evaluation forms distributed and collected; interviews conducted with students, volunteers, teachers, parents	Evaluation Subcommittee
June, second week	Final evaluation of project	Evaluation Subcommittee and Human Resources Committee

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Each sub-committee responsible for a task or tasks within this overall framework would do a similar timetable to chart its course of action.

Another way to display a plan of action is to construct a matrix (Chapter 10, page 127).

Carrying Out the Plan

Adopt Good Management Practices

Good leaders are good enablers; they help all persons in the group to contribute their talents. They are sensitive to members' needs, flexible as a task unfolds, and aware of changing conditions both within and outside the group.

Members of volunteer groups participate because of personal needs and aspirations. Among the needs are an opportunity to collaborate with others, give of oneself, and have a place to learn and use individual skills and achieve competency. Therefore, one important function of leaders is to insure that these personal needs are met. A second management task is to communicate clearly what is expected and see that the necessary resources are provided. Finally, a good leader must trust people, willingly assign responsibilities, give members the freedom to carry out tasks creatively, and expect them to follow through. The leader whose philosophy is, "If I want it done right I'll have to do it myself" does not experience the joy of shared accomplishment or benefit from the creative ideas of others. Accountability does not require holding a tight rein or breathing down another's neck. It does involve giving adequate directions, requiring systematic documentation, and calling for regular progress reports.

Good management also requires flexibility. As tasks are accomplished, check points should be established to assess progress and also to determine if changes need to be made. Is there a need to alter organizational structures? Does strategy need to be revised? Should the timetable be changed? Are additional resources needed? Are participants completing assignments on schedule? You have probably been involved in evaluation at the end of a project. If so, you're aware that such questions as the preceding, asked as a project unfolds, also enable you to evaluate the process. Such systematic analysis helps a leader to know project status and when to alter the course. If plans are altered in one segment of a project or activity, remember to inform everyone who will be affected by the change. Good project coordination, and mutual understanding among members, helps to avoid unnecessary conflict.

Keeping People Informed

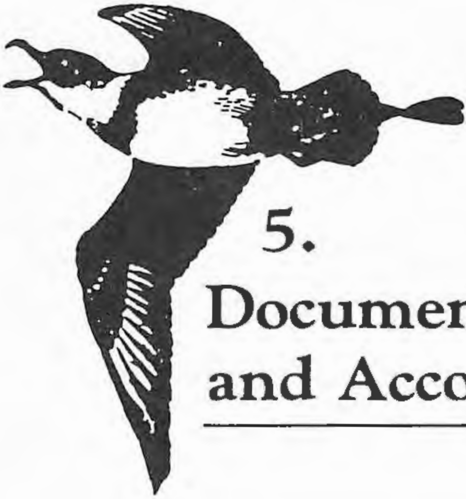
Probably one of the most important aspects of carrying out a project is maintaining good communication, and an essential prerequisite to this is good records, appropriately filed so they are readily available. With such information at hand, keeping all parties fully informed is vastly simplified. Not only should the membership be kept informed, but also anyone else who is affected by the project. For example, in the tutoring project (Chapter 3, page 29), appropriate information should be provided to the students, volunteers, parents, principal, and trainers. In addition, information should be provided to the media and the public (See Chapter 14).

Recognizing and Rewarding Accomplishment

Project action is not complete until you have recognized and rewarded accomplishments of participants. Award dinners, where contributions are cited, and certificates, plaques, or other mementoes are given, should be a part of the recognition plan. For the tutoring project, students, volunteers, and other participants were recognized for their achievements at a picnic.

In addition to the final recognition event, little successes should be celebrated along the way. Graphs and charts are sometimes displayed to dramatize progress toward achieving a goal. Taking time to talk with group members about progress and to express appreciation for their work is time well spent. People need to know that their accomplishments are noticed and valued. A sincere thank you, expressed honestly and spontaneously, makes anyone feel that his/her efforts have been recognized as worthwhile. One author stresses the importance of showing appreciation through non-verbal communication: "A warm pat on the back, a wink, an agreeing nod of the head, a smile will more than triple the value of your words. Show your feelings. Use your face. Use your hands. In short, when you feel it, show it."*

*Dunn, Douglas, "How to Motivate People in Groups," Community Guide Motivation Series, Cooperative Extension Service, The University of Arizona, Tucson, Arizona.



5. Documenting Experiences and Accomplishments

Action, even successful action, is not enough. It must be documented and recorded. The record keeping and documentation that accompany an action project can be just as interesting and satisfying as any other part of a project or community activity.

To see how simple report writing can be, try these seven steps:

(1) recognize responsibility for reporting and its importance;

(2) consider how report will be used;

(3) begin early to gather data;

(4) organize materials and ideas;

(5) develop documentary evidence;

(6) keep reports simple and concise; and

(7) provide proof of accomplishment.

If the report is to be used outside your group, for example, in a news story or as documentation for a funding agency, ask someone unfamiliar with the project to read the report before it is typed in final form.

It is essential that group leaders assign the reporting responsibility carefully. In most groups, there are those who excel in recording or reporting and find it satisfying. Seek them out. Perhaps a member of your group might be interested in becoming a specialist in report writing and would welcome the experience. Special training for potential report writers might be considered. Artistic ability is not required.

Step 1: Recognize Responsibility for Reporting and Its Importance

Often a report is required for evaluation or audit; and in those cases, specific instructions must be studied and requirements anticipated. Reports may also be required by group leaders, a board of directors, a funding agency, a national organization, the community, or the state. Even when reports are not officially required, a well-presented report of a community project to the sponsoring group, the individuals who participated, and to the community, is very important.

The sponsoring group should have a permanent record of community action in this project for its files. There is definite historical value in project reports. In the case of an ad hoc group, the report can be sent to the community library. Not all copies of the report should be filed, however. Reports should be used for constant evaluation and necessary change, for growth and stimulation of future action.

Recognition is a legitimate part of the volunteer experience, and reports provide documentation of volunteer efforts. Each individual involved in a project should have access to a copy of the report. There is growing recognition of the importance of including volunteer work in professional resumes, and people have been hired or received promotions as a result of volunteer experience. A project report can help document this personal experience. Documentation of involvement in a community project can also be valuable for those individuals who aspire to political or organizational leadership. To assist you in record keeping, an example of a Volunteer Service Record form has been provided on page 53. This kind of individual record keeping can help when reports for group projects are written.

There is a great deal to be learned from any project, especially techniques that work and those that don't. A successful project can be adapted for use in other locations; and if mistakes or failures have been freely admitted, they need not be repeated when the project is replicated. Communities can use project reports to suggest models for action or to provide ideas for future use. Well documented reports can pave the way for additional projects which meet current needs, and thus may help establish trends not only for the community but also for the state and nation.

Step 2: Consider How Report Will Be Used

Will the report be used as a model as well as for historical purposes? If it is to be used as a model, it should include sufficient details to guide other groups. Will the report be read by people who are not familiar with your area? If so, you may want to include a brief description of your community.

If the report will be entered into competition, you must follow rules and study judging criteria. Learn how points will be allotted or what project elements will be considered most important. There may also be size and style requirements that will affect your report.

Remember that the report may be used in many ways. As well as written reporting, consider oral and visual reporting, utilizing speakers, movies, slides or video tapes. If there are specific photographic needs, decide early in the project how these needs are to be met. Try to make your report as useful to its intended audiences as possible.

Step 3: Begin Early to Gather Data

Gather information as it becomes available, from the beginning of the project until its completion. Ask all group members to help the reporter gather data, and if the project is a large one, give each person a specific data-gathering assignment.

Collect pertinent data. Establish a chronological file to include project action, results, experiences of participants, evaluative comments and studies, photos, letters, documents, statistics, newspaper clippings, broadcast schedules and program content, maps, charts, and anything else relating to the project. Also record and file participant experiences. Such stories not only inject color and heighten interest in a report, but also are often useful in analyzing a particular situation. Incidents must be recorded immediately, or else they are apt to be forgotten.

Plan well for documentation. Complete a documentation planning form (pp. 54-55) at the beginning of the project to determine how you will measure accomplishments and to alert participants to the need for keeping detailed records. The form will also help you organize your thoughts and may later be a useful document for others in the community who want to conduct a similar project.

Step 4: Organize Materials and Ideas

It is better to have more material than you can use than not enough. You can always select from what you have, but you can't often create what you don't have.

Keep information in logical order as it is collected. Label the files well and locate them where they are convenient to users. Add rough notes and scraps of information to the initial files as reminders of the need for further research. Also, for future reference, file any ideas for the final report. As action progresses, make notations of accomplishments, supported by interesting details and materials. Include human interest items.

Date every item you place in a file, regardless of its nature. Dependence upon one's memory often results in lost information.

Step 5: Develop Documentary Evidence

Add to your file such evidence of activity and accomplishment as congratulatory letters, quotations, awards, newspaper clippings, printed programs, radio or television scripts, and statements from observers or those who have benefitted from the project. If statements are not readily available, ask for them. Most people will understand the need for project documentation.

Illustrations also provide evidence of accomplishments. They may include photographs, maps, and a variety of other graphic presentations. For photos, arrange action shots, before-and-after photos, and also before-during-after sequences. The latter are particularly effective in showing results. Sometimes a montage of pictures can tell your story effectively. The photos included in your report also may be appropriate for local publicity. The report writer should work closely with the publicity or public relations chairperson (See Chapter 14).

Graphic aids supplement a written text and emphasize specific points. Consider using drawings, diagrams, pie charts, graphs, etc. Be specific when compiling figures. For example, give the number of participants, the total number of hours, the number of people affected by the project, etc.

Step 6: Keep Reports Simple and Concise

If you have collected material faithfully, reports will be easy to assemble and write. Begin with an outline. Write in simple and direct form. Use words economically and eliminate surplus words.

For example, instead of saying "along the lines of," you might use the word _like_; or you might replace "in view of the fact that" with _since_ or _because_.

If your project narrative is lengthy, it might be appropriate to divide it into sections or parts, all carefully labeled. It is important, however, to preserve continuity of thought. Number all pages.

Prepare a brief summary of the report. It should be the first page of the report and give the reader a broad understanding of the nature of the project. Do not defeat this purpose by making a lengthy summary.

When considering report content, give credit to participants and other groups that may have assisted. Include any history or community data that may increase understanding of the project, explain alternative courses of action considered, outline problems that may have surfaced, and provide available data on prospects for the future of the project. List fund-raising activities with a short description of each. If the project had large-scale financing, public as well as private, explain the group's influence and role in this phase of the project.

Step 7: Provide Proof of Accomplishment

Evaluation provides proof of accomplishment. You need not be intimidated by it.

> The evaluation process has been surrounded by many myths, chief among them that evaluation is some high-powered and mysterious process that can be carried out only by highly trained specialists who know a lot about

> complex data collection techniques, statistics, and computers. Many people assume that evaluators possess foolproof devices for use in determining the extent to which programs are successful.
>
> The truth of the matter is that successful evaluation depends far more upon clear, accurate, and common-sense thinking than upon highly sophisticated research techniques, although there is certainly a place for advanced evaluative research methods and analysis.*

Providing proof of accomplishments involves clearly articulated evaluative measures and carefully recording action in carrying out your project. The next chapter provides information about various methods for evaluating meetings. These same methods can be applied to evaluating projects. They include group discussion of the extent to which goals were achieved, questionnaires, and the use of outside evaluators.

*Duane Gibson, ed., A Citizen's Guide to Community Development. Princeton, New Jersey: A Peterson's Guide Publication for the N.U.E.A., 1980.

INDIVIDUAL VOLUNTEER SERVICE RECORD

The following form was developed for the National Extension Homemakers Council and cooperating state councils. It is offered in an effort to help standardize record keeping for volunteer service. Along with this record, keep copies of job descriptions, materials prepared on the job, letters of recognition, anything that documents the volunteer service.

Time Period Covered	Name of Group, Organization, Agency	Job Performed	Preparation Time (Hours) If Applicable	Actual Service Hours	Authorizing Signature/ Title

PLAN FOR DOCUMENTATION OF A PROJECT

This form is designed to help you plan how to measure and document accomplishments. Complete it at the beginning of your project.

OBJECTIVE: State what you want to happen as a result of the project. What is the aim of your action project?*

___

___

___

TARGET POPULATION: State the population directly affected by the project. It could be a small group of people with specified ages or an entire community.

___

___

___

ASSUMPTIONS: State basic beliefs or premises which make this project seem reasonable and advisable.

___

___

___

ACTION PLAN: Prepare schedule of activities for carrying out a project objective. What steps will you take?

Schedule	Task	Persons Responsible

*An overall program goal may include a number of specific projects, each with its own objectives. A separate plan should be prepared for each project.

MEASURE OF OUTCOME: State outcomes which will indicate achievement of project objective. Express quantitatively, if possible. How will you measure the success of your project?

PARTICIPANTS: Keep an accurate record of the names, addresses, and phone numbers of everyone involved in project action. This will help you work efficiently, and it provides important documentation.

Name	Address	Phone	Project Responsibility

SPECIAL TOPICS

6. Essentials for Effective Meetings

Good meetings are the result of thoughtful planning. There are seven meeting components for which you need to plan:

(1) goal,
(2) agenda,
(3) setting,
(4) group climate,
(5) participants,
(6) role of the group leader, and
(7) evaluation.

The Goal

Ask yourself: "Why are we having this meeting?" "What do we hope to accomplish?" If the answer is "Because it's the third Tuesday of the month and we always meet then," maybe you should reconsider. Some meeting goals are related to tasks (e.g., to exchange ideas, reach decisions, develop action plans). Some goals are related to relationships (e.g., to make newcomers feel welcome, to integrate "old" and "new" board members). Some goals are related to process (e.g., to improve the group's ability to deal with conflict, to encourage quiet members to participate). It is not necessary that every meeting have goals related to all three: tasks, relationships, and process. However, the person or persons responsible for planning should have all goals clearly in mind. The group also should know what the goals are. Then everyone--leaders and participants--can focus on them.

The Agenda

An agenda is a plan for achieving goals. It's like a road map, and trying to conduct a meeting without an agenda is very much like trying to get to a destination without a map or directions. An agenda states when a meeting will begin, and when it will end. Often, it indicates--with built-in flexibility--how much time will be allowed for specific agenda items. Time should be planned carefully and allocations taken seriously. To illustrate the importance of this, suppose the presiding officer and membership committee chairperson have agreed on 20 minutes for a report and consideration of a plan for new member orientation. Prior to time for this report, however, the group doesn't stick to the agenda, and the presiding officer says to the membership chair, "Oh, I'm sorry, but I guess we'll have to postpone your report until next time." It's not fair to push someone off the agenda this way. Such treatment is demoralizing and makes a committee's work more difficult.

Sometimes in planning an agenda, leaders think only in terms of roll call, reading of the minutes, committee reports, etc. These are important activities, but a focus on them may mean some very important items never make it to the agenda. What happens in meetings can be placed in four broad categories: (1) information sharing, (2) decision making, (3) assignments, and (4) planning. The reading of minutes and committee reports comes under information sharing; unfinished and new business come under the decision making category.

Some of these categories overlap, and the leader, in planning the meeting agenda, must decide how to manage these relationships. For instance, this person must communicate with each committee chair to see if (1) the committee needs to report, and (2) if the report suggests some sort of action. If it does, then time must be allocated for consideration and action.

Give careful consideration to the decision making category. What decisions does the group have the authority to make? If your group has adopted a constitution and bylaws, those documents probably indicate what decisions are made by the membership, the board, the executive committee, etc. If your group is just forming, one of its first responsibilities is to establish a governing document or documents. Sometimes the rules of the organization are embodied in one document, usually called the bylaws. If your group chooses to be governed by both a constitution and bylaws, adopting and amending the constitution usually requires action by the membership, whereas adopting and amending the bylaws often requires action only by the board.

Although your group can control only its own action, it may make recommendations to another group whose policy it wishes to influence. For example, a downtown development corporation may wish to make a recommendation to the city administration or to the Chamber of Commerce.

The third meeting category, making assignments, is a method of carrying out action. Sometimes people volunteer; sometimes the chair or group members suggest people for assignments. Sometimes people are asked in advance if they are willing to serve, and if so, the assignments are ratified by the group or simply announced by the chair.

The final category, planning, may be as limited as establishing the time, date, and place for the next meeting, or as elaborate as developing a specific strategy to implement an action plan.

Never plan a meeting without an agenda. This does not mean that all agendas must be typed and mailed in advance of the meeting, although that is often a good idea. An agenda can be distributed at the meeting, or written on a flip chart or chalkboard, or it can be announced. The authors remember an agenda that was announced in a two-minute stand-up staff meeting. The chair said, "We have called you together to announce the resignation of the agency director who will be leaving. . ." It was necessary; it was effective; it was an agenda.

Your group should agree on the agenda at the beginning of the meeting, and it is important for the chair to ask at that time if there are items to be added. This practice alerts the group to the possibility of having to agree on changes in time allocation for items. It also prevents last-minute surprises and allows the group at least a brief time to think about additions before they are discussed.

The Setting

The most obvious meeting setting is the location most convenient for a majority of the members. But sometimes other considerations are important. For example, if meeting at the location convenient to most members means that a few always have to travel long distances, perhaps occasionally the meeting should be held at a location more convenient for the few. Or, if one of the relationship goals is to foster friendliness and social interaction among group members, perhaps meeting in someone's home would be desirable. Sometimes a task goal calls for meeting in a particular facility. To illustrate: If the League of Women Voters is studying corrections, a tour of a jail followed by a meeting in the jail conference room would be appropriate.

Ideally, meeting space should be just large enough to accommodate comfortably the number of people who are expected to attend. If it is too small, people will feel cramped; if it is too large, people may space themselves in such a way that the group feeling is lost. In the latter case, placing just enough chairs in a defined space will help to create a sense of being a group. It is better to place and add chairs than to have individuals or small clusters of people sitting in relative isolation. If placing chairs is not possible, encourage people to move together to form a group.

How long should the meeting last? The answer is determined by the goal of the meeting. However, the goal must also be related to the amount of time people are able to commit. Some meetings are designed to last only an hour (e.g., a 6:30 breakfast meeting); therefore, the goal must be one that is achievable within that time.

Another item related to setting is comfort of the participants. Light, ventilation, heat, and the absence of distracting noise should be considered so that these factors, too, contribute to achieving the goal. They should be provided in such a way that participants are unaware of them.

A final matter concerned with the setting is equipment. Will name tags or name plates be useful? Chalkboard? Easel? Flip chart? Tablets? Pens or pencils? Projector? Adapter? Screen? If you plan to use audio visual equipment, always have a contingency plan. Be ready with an alternative if the electricity fails or the projector won't function despite its having been tested in advance. Most of all, stay calm. Your group will probably be supportive if you continue in a good-natured manner.

The Group Climate

The group climate, like all other meeting elements, should contribute to goal achievement. If eye contact among all participants is important, the best seating arrangement is a circle. If some separation between leader and group is desirable, and the group is relatively small, semi-circular seating is best. Boards and groups who need written materials are usually seated around tables, although some eye contact is sacrificed in this arrangement. If theatre style is used, any member addressing the group for more than a very short period of time (e.g., a committee chair making a report) should do so from the front of the room.

If, during the course of a meeting, a change in seating is to take place, such as moving from theatre style to small clusters for discussion, avoid confusion by giving specific directions for the seating change.

The placement of the leader in the group depends upon the goal. If equality in participation is the goal, place the leader in the circle with the people. If the leader's function is to do more than moderate discussion (e.g., preside over the conduct of the group's business), she or he will need to face the group. In any event, eye contact between leader and group is important, not only so the leader can be seen and heard, but also so the leader can observe and assess participant reactions.

The extent to which a group adopts formal rules for conducting its business should be related to goal attainment. Small cohesive groups may need few formal rules, whereas groups representing very diverse elements may need to adhere strictly to parliamentary procedure. If the latter is needed, the leader should appoint a well-qualified parliamentarian to rule on procedural matters.

The Participants

Who are they? What are their expectations? What should be done to help them contribute to goal achievement? Certainly they need to feel welcome and physically and psychologically comfortable. Assign established group members to greet participants, serve as hosts, and provide a beverage (remember, not all people drink coffee) or light refreshments. Such hospitality helps all members, and especially newcomers, feel welcome.

Introductions are important, too. A newcomer feels very uncomfortable if the chair says, "Well, I guess we all know each other." Never make that assumption unless you're absolutely sure it is correct. Sometimes game introductions are appropriate and effective; sometimes they are not. Factors to consider are the time that can be allowed for introductions, and the relationship of the information gathered in introductions to achieving the goal. For example, if participants represent several chapters of a service club meeting for a membership workshop, introductions might be limited to: What is your name? What club do you represent? What is your most significant challenge in recruiting or retaining members? By limiting the information sought, you avoid rambling introductions and conserve time to focus on the workshop goal. In a meeting situation where many participants do not know others, ask each one to find a person he or she does not know, chat for one or two minutes and then introduce the partner. In this way everyone knows someone, and non-threatening participation has been initiated.

Introductions that focus on the meeting goal help the leader to know something about group expectations. In addition to asking participants about their expectations, ask that they share them. In workshop groups, you may find it useful to give each participant "A Checklist for Group Members" immediately after introductions (Chapter 10, page 120). If you use it, allow time for everyone to read it, and indicate that you want them to complete it at the end of the workshop as a means of evaluating their own participation. Tell them it is solely for their own use; it will not be collected. Asking group members to share their expectations orally, and using the checklist, conveys the message that leaders have expectations too. When it is known that all share responsibility for creating an effective meeting, participants are encouraged to feel a sense of ownership and responsibility.

One final word about the participants: If possible, prepare participant name tags or name plates in letters large enough to be seen easily. You may want to use the back side of a tent card for some reminder or message to the participant, as illustrated:

BOB BROWN

(fold on dotted line)

TO GET THE MOST FROM THE CONFERENCE
SMILE!!!!

1. This conference belongs to YOU and its success rests largely on YOU.
2. Enter into discussion ENTHUSIASTICALLY.
3. SHARE WILLINGLY your experience.
4. CONFINE your discussion to the problem - be relevant.
5. Say what you THINK.
6. AVOID private conversations while someone else is speaking.
7. LISTEN ALERTLY to what others are saying.
8. Be PATIENT with others.
9. APPRECIATE the other person's point of view.
10. Be PROMPT and REGULAR in attendance.

The Role of the Group Leader

Rule number one is to be prepared. A well-prepared, friendly leader helps a group feel confident, relaxed, and eager to participate. A leader is always on time. Even better, the leader arrives early enough to check on the meeting setting and climate and perhaps to chat informally with a few group members.

A second responsibility of the group leader is to set the meeting stage. This means clarifying the goal, the plan for achieving the goal (the agenda), and any rules that will govern the meeting. It isn't always necessary to discuss these matters with your group. In well-established groups, they are usually clearly understood. If they are not, however, or if the group strays, it is the leader's task to refocus attention.

Where should the leader be positioned during the meeting? Does the leader stand or sit? Where? Why? The answers depend on the leader's role: teacher, facilitator, or presiding officer. A leader who primarily is teaching usually functions at the front of the room; a facilitator or discussion leader generally sits in a circle as an equal with other participants; a presiding officer most often stands behind a podium facing the group. Let the task and goals determine the position and level of formality for the leader.

Secure leaders recognize their strengths and weaknesses and call upon others for help. For example, a presiding officer who lacks expertise in parliamentary procedure appoints a parliamentarian; a discussion leader who lacks experience works with a co-leader who has experience.

Probably the most difficult task of good leaders is to LISTEN. That means a leader must think about what the participant is saying, not about the next item on the agenda. Listening is contagious. If you listen, the rest of the group is likely to listen.

How can a leader motivate a group to achieve its goals? Good planning is a key. As a leader, insure that everyone who has a special task clearly understands his/her responsibility, communicate the importance of each member's contribution, convey by your attitude that group success depends upon team work, and be prompt and sincere in showing respect and appreciation for individual and group effort. Consider the following definition: "A good leader takes more than his or her share of the blame and less than his or her share of the credit." In short, a good leader helps to build leadership in others.

The Evaluation

Evaluation is done for two reasons: (1) to measure accomplishment, and (2) to suggest improvement. Thus, evaluation should be a part of everything a group does.

How do you evaluate meetings? First, you think about whether the goals have been achieved. A second technique is to discuss the matter with the group, perhaps in some post-meeting session designed specifically for that purpose. A third method is to ask two or three members of the group to refrain from participation in the activity and to serve instead as evaluators, observing the group to determine the extent of achievement of goals. Yet another technique is to ask outside evaluators, perhaps two or three members of a comparable organization, to attend and evaluate one or more of your meetings. Your group could then return the favor. A final method of evaluation, and one frequently used, is the questionnaire. Regardless of which evaluation method you use, you need to establish measurement criteria in advance, leave the evaluation open-ended, or choose some combination of the two.

A final step in evaluation is to ask yourself whether you achieved anticipated results, and also if you achieved any other results, positive or negative, which were not anticipated. Remember to think about evaluation in terms of the three types of goals: task, relationship, and process.

7. Tips for Discussion Leaders

A discussion is one type of meeting; therefore, the same techniques that are described in the chapter on effective meetings apply also to good discussions.

Principles

Discussion leaders are somewhat like orchestra conductors. They must help each participant make his/her finest contribution to the group. A good discussion leader is guided by the following principles:

1. All participants deserve to be treated with respect. They are not to be stereotyped; everyone has something to give. If discussion leaders indulge in stereotyping (e.g., "the heckler," "the know-it-all"), it is difficult for them to see the many dimensions of each individual and to treat

that person with respect.

2. All participants are to be dealt with fairly. This means the leader must try to create conditions under which each member of the group can make optimal contributions. It also means treating all participants equally. It may mean establishing some ground rules to insure equality.

3. Individuals have different interests, abilities, and needs. Leaders must be sensitive to these. They must listen carefully to pick up cues that will enable them to draw out each person's special contribution in a manner that enriches discussion. They should try to read faces to see if participants are understanding the discussion, and to ask periodically if there are questions or matters they would like to have clarified.

4. Persons responsible for arrangements and content have an obligation to plan carefully so a group can achieve its goals.

Discussion Content

Generally, discussion formats can be broadly grouped into two categories: (1) those in which all participants have an opportunity to participate equally, and (2) those which involve a group of experts or resource persons. In the latter case, the experts may hold a discussion among themselves before an audience, or they may make presentations and then carry on a discussion among themselves or with the audience. In both categories, careful planning is a must.

Good discussion meetings don't just happen.

Clearly communicate the discussion purpose or goal to the participants. Design the discussion outline, whether written or stated, to achieve that goal. If you are responsible for planning a discussion in which resource persons will be used, take special care to see that the discussion is well-integrated. A discussion format involving several panelists often comes off as several separate presentations. One way to prevent this is to provide for the panelists--well in advance of the meeting--an outline or series of questions that clearly define your expectations. The following memo and discussion outline for panelists is an example.*

> Attached is a discussion outline for the segment on goals and involvement. I will moderate the discussion, which is scheduled to last about 40 minutes.
>
> You will notice the questions are extremely general in nature. It is my hope that you, the participants, will provide the specifics. There are not, of course, <u>right</u> answers to any of the challenges posed. Each of you will clearly approach the problems from a unique perspective. We should have varied responses.
>
> I have listed a discussion time for the segments. Participants will each have approximately a third of that time to discuss the challenge. Please attempt to organize your responses so that you use the time well. I will be firm in adhering to the outline.

*Humphrey, Mary Jane. Memo to panel participants, Nebraska Community Improvement Program Recognition Day, 1978.

GOALS AND INVOLVEMENT

CHALLENGE......RESPONSE

1. Goals (15 minutes)

Those of us who practice community development stress community goals setting. We have learned that widespread agreement on goals--knowing what we want to do and why we want to do it--is a critical factor in successful improvement efforts. At the same time, we recognize that establishing community goals may not be a simple matter. The challenge is to develop a goals-setting process which insures two things: broad participation and realistic goals. What is your response?

2. Involvement (15 minutes)

Virtually every community improvement organization in our state voices a problem: There just aren't enough people to do what needs to be done. When Harriet Naylor, a nationally recognized authority on volunteerism, addressed a recognition day workshop, she connected involvement problems with goal setting. Involvement is rarely a problem, she maintained, if the goal is sufficiently important. Whether you agree or disagree, and you may want to comment, there are realistically some problems in finding enough people--or the right people--to work toward the most popular of goals. The challenge is to create an organizational setting which attracts and supports a high level of volunteer involvement. What is your response?

3. Leadership (10 minutes)

Good leadership is often both the cause and result of community improvement activities. But sometimes the process stalls, new leaders do not emerge, and seasoned leaders become tired and discouraged. The challenge is to insure that new leaders develop while improvement activities are carried out. What is your response?

This memo tells panelists exactly what is expected, provides for fairness and equality in the use of time, and focuses the discussion toward an integrated presentation.

Plan discussion content in which all group members have equal opportunity to participate as carefully as the discussion in which resource persons or experts are involved. This means you must clearly state the goal or purpose, including why the discussion is being held, what is to be accomplished, and how results are to be used. You may give a discussion outline to each participant, write it on a chalkboard or flip chart, or merely announce it. In any case, plan the content to achieve the goal. Also structure it to keep the discussion moving. It is a good idea to start with questions that people are likely to discuss with comfort, and work toward more complex issues, or those requiring decisions or recommendations for action. Also, choose questions that require comment, i.e., those that can't be answered with a simple "yes" or "no." Use the discussion outline not only to move the group toward goal achievement, but also to bring them back to the subject when they stray. Avoid being rigid or inflexible, however. If question five, for example, is discussed while the group is on question three, skip question five.

Participation

If the discussion goal is to maximize participation and establish equality, the best seating arrangement is a group of six to twelve in a circle. Provide name tags with letters large enough for all to see. Use a common form of address, i.e., all first names or all titles. If you can do it inconspicuously, quickly make yourself a seating chart and, as people are introduced, listen carefully and make a few notes about their talents and interests. You may find an opportunity to refer to that information later in the discussion. It could be especially useful to draw out the non-participant. Do your very best to make it physically impossible for people to sit outside the group. If possible, arrange the seating in advance. You may want to leave one or two extra chairs within the circle, or whatever seating arrangement is used, for latecomers. Keep the extra chairs somewhat inaccessible. Try to arrange in advance for a helper who will place extra chairs as needed.

People who come late are likely to play a non-participatory role. You must, therefore, create an atmosphere that clearly says everyone has an equal opportunity to participate and your expectation is that everyone will participate. Welcome, introduce, and brief individuals who arrive late so they will immediately become participants.

Encourage everyone to address the entire group. In those situations where the leader faces the group, as opposed to being seated as an equal, the tendency is for participants to want to carry on a dialogue with the leader. If this happens, gently remind group members to address the entire group. Another technique for breaking that pattern is to divide the group into smaller units for a short period and then bring them back together. The authors once watched a colleague effectively use a combination of techniques to encourage group interaction. First, he presented background information for the discussion. Then he divided the group into small units, gave each a specific discussion assignment, and asked that each group record its major findings on newsprint. After the small groups had completed their discussions, he asked everyone to place their chairs in a semi-circle facing the front of the room where he displayed their completed sheets of newsprint. He then moved to the back of the room behind the chairs. The result was that the group focused attention on information on the newsprint and on each other, rather than on him.

The problems of too much participation and too little participation are faced by every discussion leader. If there is someone who doesn't participate, or who participates very little, it may be effective to look directly at that person and say, "Is there another comment?" or "Could someone express an argument on the other side?" or, "Bill, what do you think might be done?" You must be careful in calling on someone by name, however, because a person has a right to choose not to participate. You also encourage participation by using what people have said earlier to draw them into the discussion.

Sometimes it is necessary to discourage participation, especially if one or two people are trying to take over. You can deal with this problem in several ways. If the group takes a break, a restructuring of seats during that time may help. When members are seated around a rectangular table, for example, those across from the leader tend to participate more than those next to the leader. If name plates have been used, it is a simple matter to place them differently and so restructure the seating.

Sometimes it helps to break the over-participation pattern by dividing the group into teams or very small units for a few minutes. Or, it may help if you give a very vocal person, especially one who has elevated group rank or status, some special recognition and task and then be kind but firm in limiting participation. For example, you might say, "We know John has had a wealth of experience in this area. John, will you please make notes on <u>new</u> ideas expressed here and then add some from your own experience. We will ask you to report to us in a few minutes."

Sometimes people become angry about issues under discussion, and you may feel uneasy about dealing with such strong emotions. You must respect the right of angry people to be heard, however. It is not fair to deny them the right to speak or to deprive the group from hearing what they have to say. Sometimes it is informative and provocative. In addition, the knowledge that you will treat them fairly and are interested in their point of view often defuses their anger.

To insure that everyone is treated fairly and respectfully, some discussion meetings require special rules. In a candidates' meeting, for example, it is very important for each to have equal time, not only for presentation, but also for responding to questions. In such meetings, use a time keeper to let speakers know how much time they have left and to signal when it is up. Rules must be established for the audience, too. To assure compliance, announce the rules at the beginning of the meeting and enforce them fairly and without apology. The authors once moderated a meeting in which one rule was that members of the audience could not use more than one minute to ask a question. The purpose of the rule was to assure that people would ask questions rather than make speeches. One man refused to honor the time limit and ignored efforts to enforce the rule, so we moved on to the next question without permitting his question to be answered. Although such measures may seem drastic, they are essential in carrying out the principle of treating all participants fairly.

Sometimes leaders worry about silence. Don't. It gives people time to collect their thoughts and to frame what they want to say. It also establishes an earnest, reflective atmosphere, and communicates your expectation that the group will assume the major responsibility for discussion content.

Verbal Reports

Reports can be deadly, dull, and boring, but they're often useful or essential. How can they be made interesting, useful, and accurate?

First of all, give the groups some reporting guidelines before the discussion begins. Appoint a recorder/reporter for each group or ask each group to choose one. Tell them why and to whom the report will be made. Suggest that the group stop periodically to give the recorder an opportunity to see if she or he has accurately reflected their ideas. Next, establish some boundaries for the report itself. You might (1) ask for only one or two ideas, (2) establish a time limit, e.g., three minutes, (3) ask for new information--something that hasn't been reported before, or (4) ask the group to present its plan of action.

Five minutes or so before the discussion is to end, suggest that the group allow the reporter to read the proposed report to the group to see if any changes or modifications need to be made. When it is time for reports, ask reporters to stand where they can be seen and heard by everyone. This will emphasize that the report is to be made to the entire group, not to you. If several reports are to be made, avoid making comments that imply comparative judgments. When all reports have been made, re-state the purpose of the discussion and how results are to be used. Thank the reporters and the groups for their participation.

In summary, good discussion leaders take an active role in guiding discussion. They motivate others to become enthusiastic and involved as they expand their horizons and those of others through sharing ideas. Discussions must be as carefully planned as other meetings. Special attention should be given to content, participation, and reporting. Finally, underlying all good discussions are the principles of respect and fairness.

8. Up with Committees!

There is an important role for committees in every organization. This chapter describes the types of committees, major functions of committees, suggestions for effective committee operation, and useful alternatives to the committee.

Types of Committees

Committees may be classified according to whether they are permanent or temporary, how they are created, how they acquire members, and to whom they are responsible. Understanding these aspects of a committee and the major purposes or functions of the committee is the first important step in making more effective use of committees in your organization. First, committees usually can be divided into permanent or standing committees and temporary or ad hoc committees. The standing committee has regularly assigned responsibilities. The organization's executive, membership, and finance committees are three examples. The ad hoc committee is temporary and carries out one specific task, such as conducting a building campaign or responding to a special organization problem.

How a committee is formed is important because it tells you to whom the committee is responsible and gives you some indication of its significance within the organization. Committees are created in at least three ways: through action of the membership, the board, or the executive committee. Any one of these ways provides strong support for committee work because the organization has assigned the task, and committee work will be reported back to the organization.

A committee also may be created by the organization's president. Committees created in this way usually carry less important responsibilities than those established by the organization. A third way to create committees is by the actions of persons within the organization who identify a need or opportunity and come together to work on it. Potentially, this is the weakest type of committee because it lacks authority and status. How its recommendations are received depends upon the status of the members of the committee and the nature of its report.

Just as committees are created in several different ways, membership on committees may come about in several ways. The members may be appointed by the same body that created the committee. This is the usual way and it makes sense. If you decide a committee is needed and have the authority to create the committee, you certainly have the authority (some would say the responsibility) to name the members. In some cases, the group creating the committee names the chair and empowers that person to name the members. As mentioned earlier, the committee may be self-appointed. At least two other variations are possible. The body creating the committee may name the chair and give that person the authority to name committee members, or name the committee members and give the committee or its chair the authority to add others as needed.

Committees are responsible to the bodies that appoint them. If the committee is permanent or standing, its creation usually is provided for in the organization's constitution or bylaws. It is therefore responsible to the governing board of the organization. A self-appointed committee is responsible to no particular body, but usually submits its report to the organization's president or board.

Major Functions of Committees

In general, the basic function of any committee is to take action on matters assigned to it. At the time a committee is appointed, it is important that: (1) the "charge" or responsibility be clearly stated; and (2) the function is clearly understood. Committees may perform at least ten major functions:

(1) making recommendations;

(2) making decisions;

(3) giving advice;

(4) coordinating;

(5) studying/inquiring;

(6) carrying out an activity;

(7) sponsoring;

(8) selecting;

(9) educating; and

(10) assisting.

Most committees perform only one or, at most, two of the functions at a time.

Making Recommendations. If an organization does not have the time, knowledge, and/or special skills to consider a program or explore a particular course of action, a committee can focus on a specific issue and make recommendations. This is an effective use of a committee. An organization could spend all of its meeting time discussing one issue, such as when to hold an annual meeting and the nature of the meeting program. When a committee, however, is asked to prepare recommendations on this issue and report at the next meeting, the organization can go on to other business.

Making Decisions. Decision making usually stays with the organization and its board where it generally belongs. At times, however, decisions can be referred to committees. Usually, these are decisions which do not have major implications for the organization (e.g., a committee may be empowered to select an annual meeting place but only asked to recommend the date and program).

Giving Advice. This function is less formal than making recommendations, but gives the committee much more latitude. The organization appointing the committee may request advice on how the organization should raise money for its activities. If the committee's function is to give advice, it is free to make a number of suggestions about fund raising. It might also indicate advantages and disadvantages of each suggestion, and, in general, offer a wide range of ideas, with or without suggesting which the committee considers most feasible.

Coordinating. This function usually is short-range and specific. To illustrate: A children's parade is to be held. A committee representing a number of local groups is established to coordinate plans for the parade as well as the parade itself. Coordination, of course, can be an ongoing function of an established committee. In this case, it might be a committee of representatives of various civic and social clubs with a responsibility to work out an annual calendar of events.

Studying and Inquiring. These functions may be called for when an issue is complex and recommendations and/or decisions must wait until more information is gathered. Whether or not your organization wants to help develop and support a new youth program, for example, may call for the appointment of a committee to study: the need for such a program, similar programs now available, cost of the program, staff needs, availability of staff, sources of support, etc. A committee may spend considerable time and effort in such an assignment, but it is much better than having the whole organization engulfed in such a study.

Carrying out an activity. Responsibility for carrying out an activity is frequently assigned to committees. For example, an annual meeting committee is appointed to carry out a yearly event; a committee is given responsibility for the Christmas parade. Specific activities are frequently assigned to a committee so that attention can be given to the many details involved.

Sponsoring. A committee with this function usually is quite inactive, if it meets at all. The usual purpose, which can be very important, is to demonstrate support. This may mean little more than providing formal endorsement or lending the organization's good name to some activity, e.g., a city-wide clean-up campaign.

Selecting. This function can focus on people (selecting a speaker for the annual meeting, selecting a new secretary) or on objects or events (selecting the best community projects, selecting a site for the craft fair). It usually is a very specific assignment, and the committee has the decision-making responsibility.

Educating. This function involves a wide range of activities. A committee, for example, may hold a series of public meetings to inform the community about the increase in crime. Another committee may learn about new state laws and inform the membership of the organization.

Assisting. This, in a broad sense, is the function of every committee. There are, however, instances in which assisting is the specific required committee function. A committee may be called upon to assist another committee to carry out its assignment. For example, the annual meeting committee may need the assistance of the hospitality committee to handle the reception before the meeting.

Being aware of the types of committees and having a better understanding of their major functions will help your organization and its committees to carry out responsibilities more effectively.

Making Committees More Effective

Committees are necessary to the functioning of every organization. The following suggestions will help you achieve optimal committee benefits and minimize problems:

1. Put in writing committee purposes, functions, and powers so they will be clearly understood by the appointing body and committee members. Example: a committee is appointed to plan an annual fund-raising event (its purpose). The committee will study successful fund-raising events in nearby communities, then develop a plan and present it to the appointing group for approval (functions). The combined travel mileage of committee members may not exceed 500 miles. Members will be reimbursed for travel and related expenses (conditions). Both the appointing organization and the committee know what is expected when a written "charge" contains such information as that just presented.
2. Select with care all members of committees. Effectiveness of a committee is directly related to the way its members are selected. They should be interested in the work of the committee, willing to serve, and able to make a contribution because of their knowledge, experience, special skill, or other qualifications. In making selections, the appointing organization should see that the membership is repre-

sentative and that the members can be expected to work together effectively as a group.

3. Foster the expectation that all committee members will participate actively and function as a team. A committee is a work group with a specific task to perform. To perform well, members must function well together. A group effort requires regular attendance, active participation, and full involvement of all members. They must be ready to accept responsibility, carry out an assignment, and discuss and make decisions. Committees usually are small and frequently work intensely over relatively brief periods of time. These conditions make it that much more important that members work well together as a team.

4. Develop adequate committee plans and make essential preparations for committee work. A committee usually operates under pressure to complete its work by a given deadline. To keep on schedule and minimize problems and unnecessary delays, the committee should carefully plan its action, as well as how and when each step will be made. What materials need to be secured and reviewed? How often does the committee need to meet, and how can it use meetings effectively to fulfill its assignment and be ready to report at a specified time? (See Chapter 6.)

5. Ask committees to keep adequate written records and prepare a final written report. At a minimum, written records should include a list of committee members, meeting

notices, agendas, minutes, and any reports. A final report should briefly state the committee purpose, its activities, and, if called for, recommendations or suggested alternatives for action. The report can be as brief as one page. If it is apt to be lengthy, the committee may present only a few pages and submit the rest as supporting documents or appendices. Since many committees are temporary, someone must see that their records are safely stored and the whereabouts known.

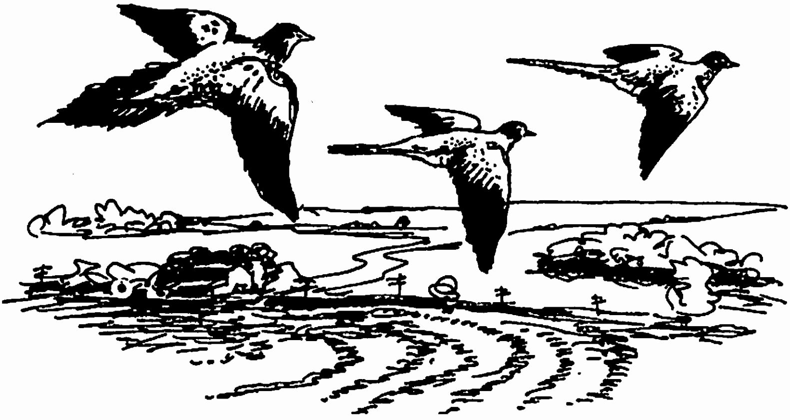
The preceding suggestions do not exhaust the possibilities for making committees more effective; however, they do suggest specific ways for a committee to accomplish its purpose and at the same time give members a satisfying experience. A committee can serve the appointing organization and its members in a number of useful ways. It can carry out duties that do not seem appropriate for the total organization, or do not require the time of the whole group. Committees also help to involve more members in the activities of the organization and can serve as a training ground for members as they assume increasing responsibility in the organization.

Alternatives to the Committee

The first alternative is no committee at all. Before creating one, be satisfied that the assignment cannot be carried out effectively by the organization or some part of it already in existence. Assign tasks to committees only if the membership or board decides it is unable or unwilling to act upon them. If the task is simple and of brief duration, perhaps one of the officers can perform it. If a clear committee charge cannot be identified or a proper function agreed upon, then alternative ways of dealing with the matter must be considered.

The second alternative to a committee is a task force. Task forces are groups of carefully selected individuals appointed for a limited time to tackle an immediate problem. Such groups usually have more power than conventional committees, and their recommendations carry more weight. They should be used only to tackle difficult problems of importance to the appointing organization.

Effective committee work is vital to the health of an organization. If the type of committee and its function are clearly identified, and if the five suggestions for making committees more effective are followed, the result should be an assignment successfully completed to the satisfaction of the committee members and the appointing organization.



9. Out in Front

Leadership is a shared group function, extending from the president and officers of an organization to board and committee members, and to all other members who have group responsibilities. Use of the following three principles of leadership can strengthen your group:

(1) Leadership is a function shared by members of a group and not the property of an individual.

(2) Leadership skills are gained through experience.

(3) The major functions of leadership are accomplishing tasks, building group relationships, and meeting the needs of members.

Leadership As a Shared Function

Charisma is not necessarily an essential characteristic of an effective leader. The most important concept in effective leadership is leadership as a shared function.

When you examine the various services and functions performed by an organization, you find that many of them are performed by members. Thus, they share in the organization's leadership. These services and functions include:

(1) Initiating ideas, suggesting changes, proposing solutions. While the designated leader has a responsibility to see that the group functions effectively and that appropriate procedures are followed, most of the ideas, suggestions, and proposals for organizational maintenance and renewal come from the members.

(2) Seeking and giving information. Members can identify information that may be needed. Collectively, they may already have much of that information or know where it can be obtained. They may be asked to bring such information for consideration by the group.

(3) Seeking and giving opinions. Members may express opinions on a wide range of issues of importance to the group, and equally important, urge other members to voice their opinions.

(4) Stimulating and focusing discussion. Members may help by

elaborating on items, seeking additional information or opinions, ignoring irrelevant issues, summarizing ideas or suggestions, giving examples, etc.

(5) Deciding on a course of action. Members may call for a vote, suggest that a matter be referred to a committee, request that an item be labeled, or suggest some other course of action.

When you share leadership, your performance depends upon group performance. The extent of the services and functions carried out by members varies among groups and within the same group over time. The important point is: Share leadership functions. If you assume too much leadership, the group may perceive you as an autocratic leader, and thus lose interest and leave management of the organization entirely in your hands. If you assume little or no leadership responsibility, the organization may flounder because its members lack a sense of direction.

Closely associated with the principle of shared leadership is an understanding of the special relationship between designated leader and group members. If you are well liked, respected, trusted, competent, and relate well to others, group members will give you more power, allow you more flexibility, and provide you more support. Such a positive relationship results in greater participation by members and, consequently, increased group output.

Leadership Skills Gained Through Experience

Most people can acquire leadership skills although their ability to use them may vary widely. Skill development comes primarily through experience rather than formal training. Prior to learning through experience, however, the individual needs some orientation, some understanding of the nature and purpose of leadership, and some appreciation of effective use of leadership skills.

There is no better place to gain leadership skills than in clubs and organizations. If you give group members responsible roles within such groups, you give them an opportunity to develop and refine leadership skills, and--at the same time--to participate in a process that builds and strengthens the group itself. Instead of an organization with a few hard-working leaders, and a large number of inactive followers, you will have a situation where literally everyone shares in the leadership.

Give increasing responsibility to individuals who handle their tasks well and show evidence of growing with experience. Such action allows them to continue to develop their leadership skills. Their value to the group is thus enhanced while they fulfill their own potential for growth. Other group members will demonstrate lesser amounts of energy and ability. Some may not be able or willing to devote the amount of time required by the task. If this is the case, they are still of value to the organization as active, interested members who can contribute to the services and functions of shared leadership.

While experience in a club or organization is the best way to learn and develop leadership skills, there are other ways. The next chapter, "A Baker's Dozen," offers a number of possibilities, such as role playing, a technique that provides opportunities for members to practice what they may actually experience later. Such training activities give members experience without their having to confront the potential consequences of a real-life situation. The learning is also enhanced by a critique of the activity.

The Three Functions of Leadership

All groups have goals, and the best measure of success is how well they achieve them. The first of the three important functions of leadership is to help your group accomplish specific tasks that support its goals. These may include such activities as raising money for a community service, carrying out a local improvement project, conducting an annual event for handicapped children, or any one of at least a hundred others. While one or a few designated people may provide much of the leadership, you can help assure project success by involving many members in its activities.

To help a group accomplish specific tasks:

(1) Make sure tasks are consistent with group goals and objectives, have membership support, and can be carried out successfully.

(2) Make sure members clearly understand the tasks, as well as specific responsibilities of individual members in relation to the tasks.

(3) Establish a plan for carrying out the tasks and a timetable acceptable to those involved.

(4) Assist, as needed, in helping to accomplish specific tasks,

but do not take responsibilities from those who have accepted them.

(5) Support and encourage group members engaged in getting things done.

(6) Keep the entire group informed about progress.

(7) When tasks are completed, inform the entire group and recognize those who have contributed.

(8) Encourage an assessment of each completed task so that the group may learn from the experience and be better prepared to accomplish future tasks.

As you review the preceding list, you will see that the leadership function is not to perform the tasks, but to see that the tasks are performed. Leaders need skills to plan, delegate responsibilities, coordinate people and projects, inform members, support efforts and assist as needed, recognize accomplishments, and review results. A leader with these skills can help a group successfully accomplish its tasks. The question that must be answered by the group is which members are best equipped to perform the tasks. When this is answered, you have identified your leadership for task accomplishment.

<u>The second major function of leadership is to build and maintain strong group relationships</u>. Some groups are very cohesive, with strong bonds among members and a high level of commitment to the group as a whole. In general, there are three explanations for strong group relationships: (1) common characteristics of the individuals who make up the group (e.g., people of about the same age

and background with similar interests); (2) good interaction among group members (e.g., members respect each other, enjoy being together, and function well together); and (3) a supportive framework in which these individuals can come together and function as a group (e.g., individual participation is solicited and valued by the group).

Through social and communication skills, leaders must help members become aware and supportive of group purposes, to participate actively, help build group spirit, and work for group success. You can enhance group interaction and create a supportive framework in which members can function well together by doing the following:

(1) Create an open, friendly atmosphere. Encourage suggestions and discussion in a manner that all members feel free to participate.

(2) Seek group feelings and areas of agreement. Recognize differences and work out compromises that respect different points of view.

(3) Encourage group efforts, based on group decisions.

(4) Stress a sense of pride and accomplishment in tasks successfully completed, as well as a feeling of pride in the group itself.

Leaders often give most of their attention to helping a group accomplish tasks and carry out its maintenance functions (e.g., election of officers, planning and conducting meetings, maintaining a membership roster, etc.). Important as these functions are, do not allow them to overshadow attention to building and strengthening strong group relationships.

Persons working on an activity together may or may not be a group. It is not the joint effort that determines whether or not a group exists; it is how the individuals see the situation and whether or not they view themselves as a cohesive, productive unit. Although you may begin with the assumption that you are working with a group, pause and ask yourself: (1) "Do these individuals see themselves as members of a group?" and (2) "If so, what can we do to strengthen the group through building and maintaining strong group relationships?"

<u>The third major function of leadership is to meet the needs of members</u>. Members believe there are advantages to them in belonging, that certain of their needs can be met. As long as these needs are met and the advantages of membership outweigh the costs (e.g., time spent in meetings, dues, tasks assumed, etc.), members will remain active and committed.

As a simple test, list on a sheet of paper several groups to which you belong. Next, list several reasons why you belong to each of these groups. Finally, rank the groups in their order of importance to you as a member. The group you rate the highest is probably the one in which you are most deeply involved, and your involvement is based in part on the fact that this group meets certain of your needs and offers you advantages that you have identified. Now look at this list of groups again and think of some of your friends who belong. How active are they? There are some circumstances that may limit participation (e.g., poor health, out of town frequently); but, in general, their level of activity is a measure of how that group is meeting their individual needs.

What can leaders do to help members meet their individual needs through the group? Try the following suggestions:

(1) Help members identify what they hope to achieve through membership in the group.

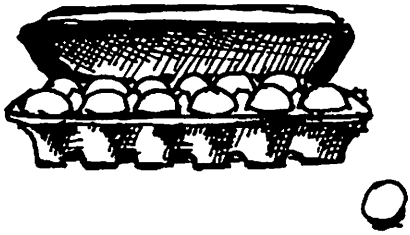
(2) Help the group identify ways it can assist members in meeting their individual needs.

(3) Make sure each member is aware of the importance of his/her contributions to the group.

(4) Make sure members receive recognition for their contributions.

(5) Provide opportunities for members to develop and strengthen their abilities through service to the group.

A strong group is made of individuals committed to the group for a variety of reasons. One of the strongest of the reasons is that the group satisfies some of their needs. In working with groups, you must keep in mind the important functions of accomplishing tasks and building group relationships. The most important function, however, is to meet the needs of members.



10. Baker's Dozen

Group activities such as nominal group process and model coherency are fully explained in earlier chapters. The first part of this chapter includes detailed instructions for using other activities: brainstorming, risk technique, mini-max, force-field analysis, paired weighting, role playing, and expanding participation.* It also suggests situations in which each might be used.

Use of these activities will help your group be more creative and effective in planning and problem solving. To insure success, follow these recommendations:

(1) Before you use a new activity, practice it. This will help you visualize just how the activity is carried out, alert you

*The original source of most of these activities is not known. The authors have modified them and added their own methods of presentation, but do not claim to have developed the processes.

to any problems, and give you confidence. Perhaps you can get your family or a group of friends to help you. The authors once practiced a new activity with a dinner club. It was lots of fun.

(2) Look for additional group situations in which the activities can be used.

(3) Be creative. You don't have to use each activity exactly as it is written. You may want to abbreviate, lengthen, or combine it with one or more other activities. In short, adapt it and make it your own.

(4) Keep looking for new activities to help your group function more effectively. Take the time to write detailed directions and keep a card file or notebook for easy reference.

As you use these activities, be sure to give group members the specific and detailed instructions included here for each activity. The material on activities is prefaced with suggesions to help you give clear directions.

Introducing an Activity

1. Choose an activity that your group can accomplish successfully. Consider time and ability of participants.
2. In preparing for the activity, identify the steps and the order in which they are to be taken. Initially, you should write directions for any group activity you plan to use.
3. Get the attention of the entire group.
4. Make sure that everyone can see and hear you.

5. Tell the group the purpose of the activity.

6. Be sure that you have all the necessary materials. Distribute materials as expeditiously as possible (e.g., from both sides). Don't walk around handing materials to each person individually.

7. Decide very carefully when to state each step; for example, if you want the large group to divide into smaller groups, decide whether you want them to do that before you give the next direction.

8. Read faces to see if people are understanding you. Ask if there are questions. You may need to do this at several points.

9. After the activity starts, move around the group to make sure people understand what they are supposed to be doing.

10. When the meeting is over, take some time to evaluate your own performance.

Brainstorming

Purpose: To stimulate creative thinking.

Uses: Brainstorming can be used whenever you want your group to generate a list of ideas (e.g., needs, goals, problems, solutions, resources, people to be served, etc.).

Materials Needed: Chalkboard, chalk, and eraser; or newsprint, felt-tip pen, and masking tape.

Directions:

1. Ask group members to call out ideas as quickly as they come to mind. Write them on the chalkboard or newsprint. The objective is to put before the group all ideas suggested, with no thought as to how feasible each one is.
2. Adhere strictly to the following:
   a. Write exactly what is said. Do not edit.
   b. Do not evaluate any idea presented. Avoid commenting, laughing, frowning, etc.
   c. Do not permit discussion of any of the ideas at this time.

Approximate Time Required:

Five to ten minutes. Brainstorming should stop while enthusiasm is high and before more ideas have been listed than can be considered. Usually the ideas suggested in brainstorming form the basis for some other group activity, e.g., discussion, nominal group process, etc.

Number of Participants:

Five to 50 or more. When used with a large number, the group is usually divided into small groups for follow-up activity.

Risk Technique

Purpose: 1. To encourage groups to express their concerns and reservations about the risks involved in a proposed course of action.

2. To examine systematically the strategies for overcoming those risks.

Uses: Use any time your group is considering a course of action, before a final decision is made. Especially useful when a proposed course of action is controversial or high-risk.

Materials Needed: None are required, although the group may wish to record the list of risks or concerns and the plan for overcoming those risks.

Directions:

1. After the group has identified a course of action or a project, go around the group once, asking each person to identify a concern or risk.
2. Go around the group a second time, asking each person to indicate which of the risks he or she believes is most serious.
3. Agree on the one or two most serious risks.
4. Develop a plan to overcome the most serious risk or risks.

This technique (1) creates an open atmosphere in which it is okay for group members to express anxieties and concerns about a project, (2) enables participants to anticipate possible problems, and (3) equips a group with a plan for dealing with problems. In some instances, a group may decide that a project is too risky to undertake.

Approximate Time Required:

Fifteen minutes to one hour, depending on the nature of the project and the comprehensiveness of the plan the group develops for overcoming risks.

Number of Participants:

One group of 6–8 or a large group divided into groups of 6–8.

Mini-Max

Purposes:

1. To involve group members in identifying tasks to be performed in carrying out a project.
2. To create a non-threatening atmosphere in which group members are given an opportunity to volunteer on the basis of their interests and abilities.
3. To create enthusiasm for a project. Mini-Max is designed to make the minimum change in what people like to do, and can do, which will have the maximum positive impact on other people.

Uses: Use Mini-Max when your group has chosen a project or activity and needs to identify tasks and assign responsibilities.

Materials Needed:

1. Tables and chairs for small groups of 6–8 people. (It is possible to seat people in a circle, but each person needs a hard surface for writing.)
2. Four 3x5" cards of one color (e.g., yellow) and four 3x5" cards of another color (e.g., blue) for each participant.
3. Paper clips.

4. Pencil or pen for <u>each</u> participant.

5. Additional supply of yellow and blue cards. Two of each color for each person should be ample.

<u>Directions</u>:

1. Divide into groups of 6 to 8 persons.

2. Give each person 4 yellow cards, 4 blue cards, and a pencil. Give each group about a dozen paper clips.

3. Tell participants to:

   a. Put your initials in the upper right corner of each card.

   b. Take 2 blue cards. Write 2 things, one on each card, you like to do or can do quite well, that might help the group complete this project. (Give people time to complete before proceeding to next instruction.)

   c. Take 2 yellow cards. Write 2 tasks, one on each card, that the group needs to have done to complete this project.

4. Go around the group once, each person reading one skill (blue).

5. Go around the group once, each person reading one task (yellow).

6. Paper clip task and skill cards that match and put them in the center of the table.

7. Repeat steps 6 and 7 with the second skill and task cards.

8. Now begin filling in new skills (blue cards) and new tasks (yellow cards). New tasks and new skills will emerge.

9. Continue to clip together tasks and skills cards that match. Provide more cards if necessary.

10. Continue to match similar skills and similar tasks (two or more working together) until all possible matches have been made.

For discussion after the group has completed the exercise: If the group does not have all the skills necessary to accomplish the tasks, what are the options?

Approximate Time Required: 20-30 minutes

Number of Participants: One group of 6-8 or a large group divided into groups of 6-8.

Force-Field Analysis

Purposes:

1. To identify where the group is now; i.e., its present state of affairs; and where it wants to be; i.e., its desired state of affairs.

2. To develop a plan for moving the group from its present state of affairs to its desired state of affairs by strengthening helping forces and overcoming hindering forces.

Uses: Most useful when your group gets down to the nitty-gritty of analyzing its chances of succeeding with a project. It is a useful technique for identifying helping and hindering forces within the group and outside the group.

Materials Needed: Chalkboard, chalk, and eraser or newsprint, felt pen, and masking tape. Enlarge the form which appears on the next page and display it on the chalkboard or newsprint.

<u>Directions</u>:

1. Tell your group to identify a project it wants to launch, a problem it wants to solve, or a goal it wants to reach. Write it for everyone to see.
2. Allow time for discussion of the statement, concluding it when the group has agreed on precise wording of the statement. Rewrite as necessary.
3. Ask the group to identify those forces that will <u>help</u> you attain the desired state of affairs. Forces may be people, resources, attitudes, traditions, values, needs, etc. List those forces in the helping column. The form allows for 10 items, but your group may list fewer or more.
4. Ask the group to identify those forces which may prevent it from achieving its desired state. List those forces in the hindering column.
5. Review each list. Separate those things you can control from those things you cannot control.
6. Rank the forces you can control according to their importance in affecting the situation on which you're working.
7. For each hindering force you have identified as important and controllable, develop a plan of action to reduce or eliminate the force. Your group will be most effective if it places major emphasis on reducing or eliminating hindering forces.

Force-Field Analysis

Present State:

Desired State:

Hindering Forces			Helping Forces	
#	rank	#		rank
1.		1.		
2.		2.		
3.		3.		
4.		4.		
5.		5.		
6.		6.		
7.		7.		
8.		8.		
9.		9.		
10		10.		

8. For each helping force, develop a plan of action to strengthen it. You may also identify new helping forces and develop a plan of action to use them.

9. Review the forces and plans of action developed in steps 7 and 8 and integrate them into a comprehensive plan of action.

Approximate Time Required: Will vary from 30 minutes to an hour in a single session, to several work sessions to develop a comprehensive plan of action, depending on the complexity of the issue.

Number of Participants: 3-30.

Paired Weighting

Purpose: To establish priorities by ranking items.

Uses: Paired weighting can be used to rank any list of items (e.g., needs, goals, problems, solutions, resources, achievements, etc.). This exercise is generally used immediately after a group has established a list of items to be ranked.

Materials Needed:

List of items to be ranked.

Paired weighting form (p. 114) and pencil or pen for each participant.

Chalkboard, chalk, eraser, or newsprint, felt pen and masking tape.

Transparency of the paired weighting form and an overhead projector (optional).

Directions:

1. Display the list to be ranked on a chalkboard or newsprint. For example, the following is a list of goals of a Citizens Group for Alternatives to Incarceration.*

   (1) To serve as a communications network among persons and groups involved or interested in alternative programs.

   (2) To educate the public on the ineffectiveness of imprisonment and the need for alternatives.

   (3) To advocate for legislation which facilitates alternatives.

   (4) To support the implementation and enforcement of existing laws and programs which allow alternatives.

   (5) To foster research and publications regarding alternatives to incarceration.

2. Give each participant a copy of the paired weighting form. Ask each participant, working independently, to rank the items by comparing and ranking the first item with every other item, then the second item with every other remaining item, and so on. To illustrate:

   Begin by using only the first line.

   Number 1 in the example is, "To serve as a communications network..." Begin by comparing number 1 with number 2, "To educate the public..." If you believe number 1 is more important than number 2, circle number 1. If you

* Bylaws of Missouri Coalition for Alternatives to Incarceration, 1983.

believe number 2 is more important than number 1, circle number 2. Similarly compare number 1 with number 3, then with number 4, and then with number 5 and circle your choices. Up to this point you will have used only the first line - the line with number 1 above and numbers 2, 3, 4, and 5 below. If possible, use a transparency and expose only line one until you are certain that everyone understands this first step. If, for example, you believe number 1 is more important than numbers 2, 4, and 5, but you believe number 3 is more important than number 1, your first line would look like this.

1	1	1	1
2	3	4	5

3. Now move to line 2. Compare number 2 with numbers 3, 4, and 5. Begin by comparing number 2 with number 3 and circling your choice. Then compare number 2 with number 4, and circle your choice. Then compare number 2 with number 5 and circle your choice.
4. Similarly rank the numbers on line 3, then line 4.
5. When you are through ranking, count the times each number is circled and enter those totals at the right. You will see that number 1 is circled 3 times; number 2 is circled 2 times; number 3 is circled 4 times, etc.

Blank Form

TOTALS

1/2	1/3	1/4	1/5	1 = ____
	2/3	2/4	2/5	2 = ____
		3/4	3/5	3 = ____
			4/5	4 = ____
				5 = ____

Completed Form

TOTALS

1/2	1/3	1/4	1/5	1 = 3
	2/3	2/4	2/5	2 = 2
		3/4	3/5	3 = 4
			4/5	4 = 0
				5 = 1

6. When everyone has finished ranking items, add the number of times each number has been circled, using the totals from each participant's worksheet. Then rank the totals, as illustrated below.

Participant A		Participant B		Participant C		Participant D	
1 1 1 1 / 2 3 4 5	1= 1	1 1 1 1 / 2 3 4 5	1= 2	1 1 1 1 / 2 3 4 5	1= 3	1 1 1 1 / 2 3 4 5	1= 3
2 2 2 / 3 4 5	2= 3	2 2 2 / 3 4 5	2= 0	2 2 2 / 3 4 5	2= 2	2 2 2 / 3 4 5	2= 1
3 3 / 4 5	3= 0	3 3 / 4 5	3= 1	3 3 / 4 5	3= 1	3 3 / 4 5	3= 2
4 / 5	4= 4	4 / 5	4= 3	4 / 5	4= 1	4 / 5	4= 0
	5= 2		5= 4		5= 3		5= 4

Group Ranking

Number of Times Circled	Priority
1. 9	1. 2
2. 6	2. 4
3. 4	3. 5
4. 8	4. 3
5. 13	5. 1

A Word of Encouragement:

Working with all these numbers may make paired weighting appear difficult. Once you have practiced it, however, you will find that it is not difficult and soon you will be comfortable using it. The activity is such a good tool for helping a group establish priorities in a thoughtful, deliberate manner that all leaders should know how to use it.

Approximate Time Required:

Will vary depending on the size of the group and the number of items to be ranked; from 15 minutes to an hour.

Number of Participants: 5-40.

The paired weighting form can be used for as many as 20 items. Since paired weighting is generally used immediately after a group has generated a list, have the forms ready in advance. The form can be used for 20 or fewer items. It is unlikely that you would use this technique to rank more than 20 items.

Paired Weighting Form

$\frac{1}{2}$ $\frac{1}{3}$ $\frac{1}{4}$ $\frac{1}{5}$ $\frac{1}{6}$ $\frac{1}{7}$ $\frac{1}{8}$ $\frac{1}{9}$ $\frac{1}{10}$ $\frac{1}{11}$ $\frac{1}{12}$ $\frac{1}{13}$ $\frac{1}{14}$ $\frac{1}{15}$ $\frac{1}{16}$ $\frac{1}{17}$ $\frac{1}{18}$ $\frac{1}{19}$ $\frac{1}{20}$ 1 = ______

$\frac{2}{3}$ $\frac{2}{4}$ $\frac{2}{5}$ $\frac{2}{6}$ $\frac{2}{7}$ $\frac{2}{8}$ $\frac{2}{9}$ $\frac{2}{10}$ $\frac{2}{11}$ $\frac{2}{12}$ $\frac{2}{13}$ $\frac{2}{14}$ $\frac{2}{15}$ $\frac{2}{16}$ $\frac{2}{17}$ $\frac{2}{18}$ $\frac{2}{19}$ $\frac{2}{20}$ 2 = ______

$\frac{3}{4}$ $\frac{3}{5}$ $\frac{3}{6}$ $\frac{3}{7}$ $\frac{3}{8}$ $\frac{3}{9}$ $\frac{3}{10}$ $\frac{3}{11}$ $\frac{3}{12}$ $\frac{3}{13}$ $\frac{3}{14}$ $\frac{3}{15}$ $\frac{3}{16}$ $\frac{3}{17}$ $\frac{3}{18}$ $\frac{3}{19}$ $\frac{3}{20}$ 3 = ______

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20 = ______

Role Playing

Purposes:

1. To develop skill in analyzing and solving problems.
2. To gain insight about the attitudes, feelings, and behaviors of people whose situation or point of view is different from your own.
3. To develop skills in interpersonal relationships.
4. To rehearse for a problem-solving situation.
5. To clarify abstract subject matter (e.g., acting out an historical event might make it more vivid than lecturing about it).

Uses:

Role playing can be used in any situation involving interpersonal relationships. It's very similar to playing "Let's Pretend." Your group could use the activity to simulate an interview, a committee meeting, a family argument, an encounter with a group of people you hope to serve, a session with elected officials, a confrontation with another group, etc. The possibilities are endless.

Materials Needed:

A printed scenario, if you think it would be helpful.

A checklist of information to be gathered, if there are observers.

Other materials that may enhance the role-playing situation should be provided by the actors.

Directions:

1. Prepare a scenario and present it to the group. The scenario should describe the following:

   a. the physical setting for the encounter,

   b. the issue or problem to be solved, and

   c. the goals and motives of the actors.

Make the scenario relatively brief, but include enough information to enable the players to solve the problem. No one should be permitted to introduce facts unknown to others. If participants are uncertain about what constitutes a fact, they should consult you. Your task is to ensure fairness in the use of information.

2. Give each participant or group time to consider strategies and prepare for the role-playing activity.

3. If the role playing involves a conflict situation, encourage each participant or group to establish an up-front and a fall-back position. These positions should not be openly revealed to the other side. Their purpose is to allow for negotiation (see Chapter 11).

4. Ask participants if there are questions. Be sure they understand their roles. Encourage spontaneity.

5. Tell the actors to begin their roles. Play can continue as long as it is relevant and moving toward a solution. It does not necessarily need, however, to last until the problem is solved.

6. Allow ample time for participants to talk about their exper-

ience. Encourage them to communicate their thoughts, feelings, and opinions about the thoughts and feelings of others. If some participants have served as observers, give them time to discuss their observations with the players. Finally, give all participants an opportunity to consider the extent to which the experience achieved its intended purposes. (Not every role-playing situation is intended to achieve all five purposes listed at the beginning of these instructions.)

Approximate Time Required:

Can vary from a few minutes in a single session to a total of two or three hours in several sessions.

Number of Participants: 2-30.

Expanding Participation

Purposes:

1. To use informal, indirect ties between groups.
2. To gain insight into the organizational interests of group members.

Uses:

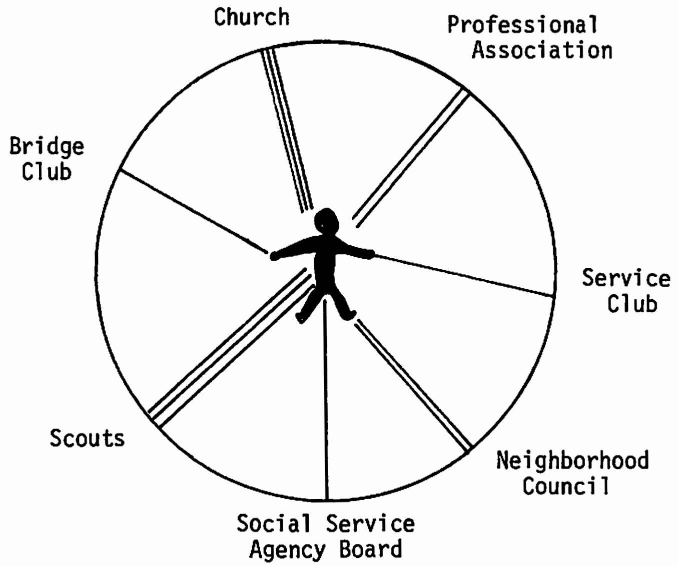
Most useful when your group needs to relate to other groups in the community or seeks to involve people outside the group in some activity.

Materials Needed:

Blank sheet of paper, pencils, and writing surface for each participant. Chalkboard, chalk and eraser; or newsprint, felt pen, and masking tape.

Directions: Ask each participant to:

1. Draw a stick figure of himself/herself in the center of the page.
2. Draw a large circle around the stick figure.
3. On the circumference, write the names of all the organizations to which she or he belongs.
4. Draw single lines, like the spokes of a wheel, from the center to the name of each organization.
5. Add two additional lines, for a total of three, to the two organizations in which he or she is most active.
6. Add one additional line, for a total of two, to the two organizations in which she or he is next most active. The completed illustration will look like this:



When everyone has finished, tape all illustrations on the wall (optional). List all organizations to which members belong (optional).

For Discussion:

1. With what organizations do we need to link for our project?
2. To which of these organizations do members of our group belong? Which group members have the strongest ties to these organizations?
3. How can the linkages our members have to these organizations be best used to help us accomplish our project?
4. What other linkages do we need to establish?
5. How can we establish them?

Approximate Time Required: 15-30 minutes.

Number of Participants: 5-20.

A Checklist for Group Members

Purposes:

1. To provide a tool for participant self-evaluation.
2. To emphasize that participants, as well as the group leader, share responsibility for group effectiveness.

Uses: Can be used for workshops, conferences, etc., and occasionally for your group's regular meeting.

Materials Needed:

A copy of "A Checklist for Group Members" (page 120), pencil, and writing surface for each member (a magazine or notebook cover will do).

A Checklist for Group Members

How Did You Do?

	YES	NO
Did you prepare yourself to participate?	___	___
Did you speak your honest convictions?	___	___
Did you speak too often?	___	___
Did you speak too long?	___	___
Did you ask questions when you didn't understand?	___	___
Did you listen to others?	___	___
Did you gain any new information or insight?	___	___
Was there a feeling of unity among the members?	___	___
Were you offended by anything that was said?	___	___
Are you still offended?	___	___
Did you offend anyone?	___	___
Did the chairperson discharge his/her responsibilities effectively?	___	___
Did you tell him/her so?	___	___
Do you have ideas as to how the discussion could have been improved?	___	___
Have you expressed them to the responsible person?	___	___
Do you have any new or continuing responsibility as a result of this meeting?	___	___
Are you growing as a member of a learning team?	___	___

Directions:

1. Distribute materials.

2. Tell participants:

   a. Please take a minute or two to read the checklist.

   b. At the end of the session, we will ask you to check the "yes" and "no" columns.

   c. This checklist is not to be returned. It is for you to use in thinking about your own participation.

3. Allow time at the end of the session for completion of this activity.

Approximate Time Required:

Three to five minutes at the beginning of the session; 3-5 minutes at the end.

Number of Participants: Unlimited.

Interviewing Skills

Purpose: To conduct effective interviews.

Uses: Interviews are especially useful for getting information and gaining support.

Materials Needed: An interview outline, pad, and pen or pencil.

Directions:

1. Establish a goal. If you are doing a team interview, discuss the goal, and when the team has agreed upon it, write it for all to see.

2. Frame a series of questions designed to achieve your goal.

3. If you are quite sure that the person you want to interview

knows you and your group, call for an appointment. If not, write a brief letter that establishes your group's credibility and explains why you want an interview. Indicate that you will call within a few days to ask for an appointment.

4. When you call to schedule an interview, explain that you will send a copy of the questions you would like to discuss. (This would not apply to survey research.) Indicate about how much time you would like to spend. An hour should be maximum.

5. You may want to practice, or role play your interview with another group member. Learn to use probing questions that elicit complete responses such as, "Can you explain that a bit more fully?" or "Will you please tell me a little more about that?"

6. Allow ample time to get to the interview so that you will arrive feeling calm and confident.

7. When you arrive, introduce yourself to the respondent and express your appreciation for the appointment.

8. If you are doing a team interview, one member should assume responsibility for asking the questions while the other takes notes.

9. Take careful, accurate notes. Ask for clarification and check for accuracy as necessary.

10. Pace yourself to complete the interview in the time allocated. Do not take more time than you have requested.

11. When you have completed the questions, ask if there are additional questions you might have asked or other useful information the respondent might add.

12. Thank the respondent.

13. As soon as possible after the interview, review your notes for accuracy and completeness.

14. Take some time to evaluate your own performance.

15. Write a thank you letter.

Approximate Time Required: 1 hour, maximum.

Number of Participants: 1 or 2 interviewers.

The Planning/Problem-Solving Process

Purpose:

To use the total planning/problem-solving process or any part of it as a guide for group action.

Uses:

The outline can be used to review any one or more steps, or to show the relationships between steps in the process. (Four of the components of the planning/problem-solving process are presented in detail as the first four chapters of this book. They are: (1) assessing needs, (2) formulating goals, (3) considering alternatives and determining objectives, and (4) implementing action. A fifth component, evaluating, is discussed in Chapter 6.

Directions:

Use the outline on the next page as a guide to your group's planning process. Choose the most appropriate techniques from among those suggested in the outline.

Approximate Time Required:

A few minutes as a review, or several hours extending over two or more sessions as a guide to planning.

Number of Participants:

1 person, committee or task force, or total group.

Planning/Problem-Solving Process Outline

I. Assessing Needs*

A. Nominal Group Process

1. Silent generation of ideas
2. Round robin listing of items
3. Discussion of items
4. Preliminary voting
5. Discussion of voting
6. Final vote (optional)

B. Needs Surveys

1. Planning the survey
2. Conducting the survey
3. Preparing and reporting the results
4. Using the results

II. Establishing Goals and Setting Priorities

A. Goals -- Why and What

*Many techniques can be used for assessing needs. This outline includes only the two discussed in this book.

1. Techniques

   a. Brainstorming

   b. Town meeting

   c. Model coherency

   d. Consulting the users

2. Relevancy

3. Conflicting goals

B. Priorities

1. Techniques

   a. Discussion

   b. Nominal group process

   c. Paired weighting

III. Considering Alternatives and Determining Objectives

A. Considering Alternatives

1. Manageability

2. Appropriateness

3. Approval of legitimizers

4. Risks

B. Determining Objectives

1. How much or how many?

2. Within what period of time?

3. With what results?

IV. Taking Action

A. Developing An Action Plan

1. Identifying major tasks and mobilizing resources

2. Designing appropriate structures

3. Establishing target dates and constructing a timetable

B. Carrying Out Action

1. Adopting good administrative practices

2. Keeping people informed

3. Recognizing and rewarding accomplishment

V. Evaluating

A. Purposes

1. To measure accomplishment

2. To suggest improvements

B. Tools for Evaluation

1. Discussion

2. Questionnaires

3. Tests

4. Application of measures

5. Interviews

C. Evaluation of Processes

1. Assessing needs

2. Formulating goals

3. Considering alternatives and determining objectives

4. Implementing action

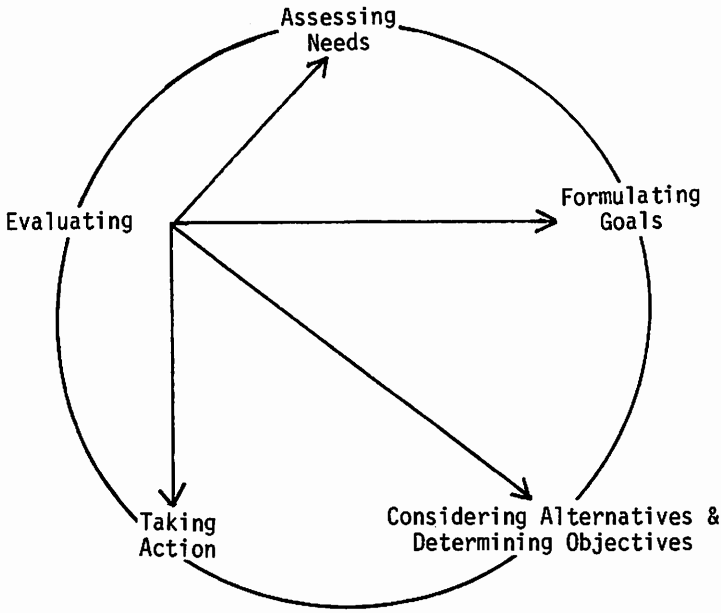
5. Evaluating

D. Evaluation of Results

1. Anticipated results

2. Results which were not anticipated

Evaluation is not a final step, but must be a part of every other step; that is, you must evaluate your process for assessing needs, formulating goals, considering alternatives and determining objectives, and taking action. (See graphic on next page.)



The Matrix

Purpose:

To present information in graphic form that shows organizational relationships clearly and concisely.

Uses:

The Matrix is especially useful as a planning tool because it can display such information as who will do what and when in a concise manner that is easy to understand. Additionally, it is useful for tracking progress and as a vehicle for holding people accountable. (See p. 128 for example.)

Example of a Matrix

Let's Read Together				
	July	August	September	October
Human Resources Committee	Meet with school principal to complete plans. 7/15: Plan August meeting session.	Meet with students, volunteers, and parents. Make arrangements for first tutoring session.	Call each volunteer after first session. Assist as necessary.	Send letter to each student offering encouragement.
Courtesy Subcommittee	Plan refreshments and luncheon for volunteer training.	Serve refreshments and luncheon at volunteer training. Provide transportation, if necessary.		Plan and serve refreshments for meeting. Provide transportation, if necessary. Plan Christmas party.
Training Subcommittee	Plan volunteer training.	Volunteer training, 8/2. Volunteer training, 8/9. Evaluate volunteer training.	Plan October meeting.	Meet with volunteer and trainer last week of October.
Public Relations Subcommittee	Arrange interview for school principal and club president with newspaper education reporter.	Send notice of volunteer training to media. Send news story after training.	Prepare biographical sketches on volunteers. Take pictures. Contact feature editor of newspaper.	Send notice of meeting to media; follow up with news story.

Directions:

1. List all tasks to be performed.
2. List the people or groups responsible for performing the tasks.
3. Construct the Matrix.
4. Enter the time periods.
5. Enter the people or groups responsible for performing the tasks.
6. Enter the tasks in the appropriate time periods and opposite the people or groups performing the tasks.

Caution: Don't try to show too much on one Matrix. Break time periods, tasks, or people or groups responsible for tasks into smaller units as necessary.

Using a Meeting Evaluation Form

Purpose: To improve meetings through systematic evaluation.

Uses:

Entire "Meeting Evaluation Form" (pp. 132-133) or any part of it, can be used as presented or adapted. Can be used as a checklist when planning a meeting. Useful to group leaders, group members, or designated evaluators.

Directions:

1. If you use the form to evaluate your own meeting performance, spend some time studying it before the meeting. Give special consideration to those items you think are

most relevant. After the meeting, use the form to evaluate your performance and that of the group. Consider your strengths as well as the areas in which you wish to improve. Be specific in documenting evidence to support your responses.

2. If group members are to evaluate the meeting, decide in advance whether or not to give them the form at the beginning of the meeting. On one hand, having the form may help them focus on essentials; on the other hand, it could be distracting. Also decide in advance who will analyze the results, how they will be analyzed, and how they will be used.

3. If you use outside evaluators, discuss the goals of the evaluation with them in advance. Allow ample time for analysis and discussion of the evaluation after the meeting.

4. Develop your own evaluation form; or, if you wish, use the form included on the next two pages. Modify it if there are ways to make it meet your needs more effectively. Whatever form you use should reflect the essentials for effective meetings:

   1. goal
   2. agenda
   3. setting
   4. group climate
   5. participants
   6. role of the group leader
   7. evaluation.

Meeting Evaluation Form

A. Goal:

1. Was there a goal for the meeting? yes____ no____

2. Was the goal clearly defined (either stated or understood)?

   yes____ no____

3. Were the goals achieved? yes____ no____

B. Agenda:

1. Was there an agenda? yes____ no____

2. Was the agenda clearly designed to achieve the goal?

   yes____ no____

3. Did the group have an opportunity to modify and agree on the agenda at the beginning of the meeting?

   yes____ no____

4. Did the agenda include a time frame? yes____ no____

5. Was time used effectively? yes____ no____

C. Setting:

1. Did the following help achieve the goals? (Indicate Y or N and add comments.)

   location ____________________

   length of meeting ____________________

   lighting ____________________

   temperature ____________________

   ventilation ____________________

   materials ____________________

D. Group Climate:

1. Did the following help achieve the goals? (Indicate Y or N and add comments.)

   seating ____________________

Could people see? ________________________________

Could people hear? ______________________________

placement of leader ______________________________

degree of formality ______________________________

E. Participants:

1. Did the following help achieve the goals? (Indicate Y or N and add comments.)

introductions ________________________________

participant expectations ________________________

rules for participation __________________________

participant needs met __________________________

F. Role of the Group Leader: (Indicate Y or N and add comments)

1. Was the leader:

well prepared? ______________________________

on time? ___________________________________

friendly? ___________________________________

competent? ________________________________

2. Did the leader facilitate participation by:

listening? __________________________________

being fair? _________________________________

showing respect? ____________________________

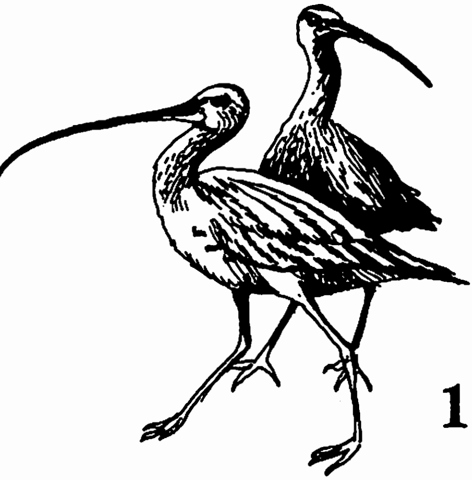
mediating conflict? ___________________________

following rules? _____________________________

creating a non-threatening atmosphere? ______________

G. Evaluation:

1. Were members told how evaluation results would be analyzed and used? yes____ no____



11. Strategies

Volunteer groups need not only to develop good action plans, but also to consider the most effective strategies for implementing them. Assume that you have decided to take action on an issue. What is the best strategy for getting the support you need? Three strategy options are available to you: collaborative, campaign, or conflict.* The choice of strategies depends primarily on the level of agreement on (1) the issue and (2) the way in which your group proposes to address the issue.

*The basic ideas about the collaborative, campaign, and consensus strategies were adapted from: Warren, Roland L., Truth, Love, and Social Change, and Other Essays on Community Change. Chicago: Rand McNally and Co., 1971.

Collaborative Strategy

The collaborative strategy is appropriate when a person or group wanting to make a change (the change agent) and the community, agency, or group to be involved in the change agree on (1) the issue, and (2) ways of dealing with the issue. When such agreement exists there is _issue consensus_. The change agent is a facilitator, stimulator, or catalyst. Those involved are open to ideas about the issue and ways of dealing with the issue and are confident that by gathering information and communicating ideas, consensus can be reached. The collaborative strategy is probably the one you will find most comfortable and use most often.

Campaign Strategy

The campaign strategy is appropriate when there is _issue difference_; that is, when there is lack of agreement on (1) whether an issue exists, and (2) how an issue is to be resolved. However, although differences exist, the assumption is that consensus can be reached. The person or group wanting to bring about change has preconceived ideas which have to be sold. Thus the change agent is persuader, campaigner, or convincer. The desired outcome is consensus; but if that is to occur, apathy or opposition must be overcome.

Conflict Strategy

The conflict strategy is appropriate when there is _issue dissensus_; that is, when there is complete disagreement on (1) whether an issue exists, and (2) how the issue is to be resolved. There is a conflict between "us" and "them." Thus, the change agent becomes a contestant working to have his or her side win. There are preconceived ideas about the issues and the way in which the issues should be resolved. Saul Alinsky, an advocate for citizen action who taught how to use conflict strategy, gave the following three directives:

1. cut the issue
2. freeze the target
3. go to war.

Cutting the issue means clearly identifying the issue about which there is conflict. Sometimes groups believe they strengthen their case by presenting a parade of horribles (a long list of grievances). A group is more effective when it clearly articulates what it wants to achieve, presents well-documented supporting evidence, and is persistent.

Freezing the target means identifying the enemy or opposition. Sometimes time is wasted and momentum is lost if a group fails to identify and deal directly with those who are on the other side of the conflict. It is also important, of course, to identify allies and to garner their support.

To go to war involves honestly facing the fact that you're in a win/ lose situation, and deciding to accept the risks inherent in conflict. It also means amassing resources and uniting in an all-out effort to win. The conflict strategy should not be used unless a group is committed enough to live with the consequences of its action, win or lose.

In reality the choice of strategies is often not so clear-cut. You may use elements of all three strategies in any given situation, or you may use one, and later another. For example, if your group has used the conflict strategy and won, it may then make use of the campaign strategy in an attempt to restore unity.

Each of the following three case studies illustrates a situation in which one of the three strategies would be appropriate.

THE COLLABORATIVE STRATEGY

(Pleasantville)

A. Issue:

A developer built and sold 30 new homes within a very short period of time in Pleasantville, a town of 500 located about 20 miles from Capitol City. Most of the homes were purchased by young couples who worked in the city. The Pleasantville Community Improvement Council wanted to develop a project to welcome newcomers to the community and involve them in community life. After careful consideration of needs and goals, they decided to sponsor a summer "Welcome to Pleasantville" program which would include the following objectives:

1. Invite established community residents to be a part of teams who would visit new families on a widely-publicized "Welcome to Pleasantville Night," scheduled for June 15. Each team would present to the newcomers gifts or gift certificates provided by local businesses; a list of local

services prepared by the Business and Professional Club; and an interest finder (a form on which newcomers could indicate community activities and services in which they would like to participate).

2. Hold a potluck "Welcome to Pleasantville" picnic on Sunday, July 17, in the village park.

3. Analyze the interest finders with appropriate follow-up action by August 22.

B. Change Agent: Pleasantville Community Improvement Council

1. Role of the change agent is to act as facilitator, stimulator, catalyst.

C. Basic Elements in Strategy:

1. Issue consensus (actual or potential consensus)

a. The issue

b. How to deal with the issue

D. Objective of Change Agent:

To involve the total community in a summer program welcoming new residents and inviting their participation in community life.

E. Task: To carry out the plan of action.

The key to the collaborative strategy is the issue of consensus. The community as a whole accepts the idea that it should welcome new residents and invite them to participate in community life. Additionally, there is consensus about the way the Improvement Council proposes to deal with the issue, i.e., planning a summer "Welcome to Pleasantville" program. Agreement on the issue and its solution is based on knowledge and communication. The collaborative strategy is consistent with the style of the Improvement Council and is compatible with the social environment of the community. Finally, the consequences are very likely to be looked upon favorably by the majority of the community's citizens. Thus, the collaborative strategy is the best possible choice.

THE CAMPAIGN STRATEGY

(Lakeside)

A. Issue:

For the past three years, a service club in Centerville has been active in dealing with issues related to Centerville's senior citizens. They have formed a close relationship with the Lakeside Residents' Council. Lakeside is a housing complex for senior citizens. Working together, the Residents' Council and the service club have not only been effective in obtaining improved services for senior citizens in Centerville, but also have sharpened public awareness about issues. At a recent meeting of the service club and the Residents' Council, insensitive, patronizing attitudes toward the aged were discussed. Two specific instances were cited.

One of the Lakeside residents, an alert, attractive, vivacious woman of 83, fell and broke her hip and was taken to the local hospital. During her recovery, she was in a great deal of pain and under heavy sedation. For some years she had been troubled with bladder spasms, and as a result needed to go to the bathroom promptly when a spasm occurred. Because of pain and sedation, it was difficult for her to find and turn on the light to summon the hospital attendant. In addition, hospital personnel did not always respond promptly to calls. As a result, one night she soiled her bed, for which she was scolded by a hospital employee. She was miserable, embarrassed and humiliated. Her roommate reported the incident to service club friends who came to visit.

The second specific situation concerning the group was the patronizing, condescending attitude of some of the therapists at Lakeside, especially those working with convalescent residents who took part in the morning exercise and awareness program in the solarium. The dialogue went something like this: "All right, folks. What day is it today? What month? What year? That's <u>fine</u>! And what holiday are we about to celebrate? Valentine's Day! Good, George. And what kinds of decorations do we put up on Valentine's Day?" And so on.

Members of the Residents' Council and the service club were indignant about both situations. They considered talking to administrators with the objective of demanding that staff involved be fired. However, after further discussion, they determined that the issue they wished to address was attitude change.

B. <u>Change Agent</u>:

Lakeside Manor Residents' Council and the service club

1. Role of the change agent is to act as persuader, campaigner, or convincer.

C. <u>Basic Elements in Strategy</u>:

1. Issue difference

   a. Lack of agreement on whether issue exists

   b. Lack of agreement on how issue is to be resolved.

D. Objective of Change Agent:

To change attitudes of personnel at Lakeside and at the hospital so that senior citizens are treated with respect. (In developing a plan of action for this objective, include specific answers to the questions: How much? or How many? Within what period of time? With what results?)

E. Task:

Develop a plan to achieve the objective using the campaign strategy.

The key to campaign strategy is the difference of opinion about the issue. In this case, one may assume that hospital and Lakeside Manor personnel either do not know or do not care that their behavior is offensive and damaging to the self-respect of senior citizens whom they serve. The Residents' Council and the service club, on the other hand, want to encourage attitudes that reflect sensitivity and respect. Thus, there apparently is lack of agreement that an issue exists. The service club and the Residents' Council will probably develop a plan of action involving education and persuasion, techniques used in the campaign strategy. The campaign strategy is consistent with the style of the service club and Residents' Council; each of which has a history of working for improved services for senior citizens and sharpening public awareness about issues. Their track record makes it feasible for them to risk the consequences of addressing this issue. Thus, you would anticipate a successful outcome.

THE CONFLICT STRATEGY

(Jackson Elementary School)

The conflict strategy is appropriate when there is <u>issue dissensus</u>, that is, when there is complete disagreement on whether an issue exists and how the issue is to be resolved. There is a conflict between "us" and "them." Thus, the change agent is a contestant. There are preconceived ideas about issues and issue solutions, and the outcome of the strategy is that one or the other side is expected to win.

A. <u>Issue</u>:

The Board of Education in Metroville has made a decision to close Jackson Elementary School. The Jackson PTA and the Jackson Neighborhood Association are unalterably opposed to the board's decision.

Enrollment in Jackson Elementary has been declining for several years. Present school population is 250. The building is old and needs repairs. It is located at the intersection of two busy streets. The board maintains that decreasing enrollment, increased energy costs, and a seven percent property tax lid have made the cost per pupil too high to justify keeping the school open. The PTA rejects the way in which the board is computing energy costs. Furthermore, the PTA and Neighborhood Association contend that a substantial grant in Community Development Block Grant funds to be spent in the neighborhood will decrease out-migration and increase population. They also argue that, because of escalating housing costs, first-home buyers, who tend to have young families, will seek older homes in the neighborhood.

Several months ago the board formed a Committee of One Hundred to establish criteria for closing neighborhood schools. After meeting for several weeks, the committee recommended that no schools currently under consideration be closed. The board contends that the committee didn't really understand the financial situation.

Board members are elected at large. The board is very cohesive and supports the superintendent, an able, ambitious man. The board believes it has bitten the bullet and is willing to accept the consequences. It contends that the neighborhood is not being denied a school since another elementary school is located a little less than a mile from Jackson.

Recently the board announced its decision to build an elementary school in Valley Home, a new subdivision in which population is expanding. The Jackson neighborhood was incensed, accusing the board of fiscal irresponsibility and favoritism.

The superintendent and the board would like to let the storm blow over and avoid further confrontation with the Jackson neighborhood. However, in a recent editorial one of the two daily newspapers has accused the board of being insensitive to neighborhood needs and not listening to citizens' points of view. In addition, the Metro Neighborhood Coalition has just issued a statement championing the Jackson group's cause. (The coalition director was trained in the conflict model and welcomes controversial issues as a means of keeping the coalition alert and active.) The PTA, the neighborhood association, and the coalition have joined forces and demanded a special meeting with the board. Reluctantly the board has agreed. The meeting is scheduled for 2:00 p.m., Friday, in the board room at the Public School Administration Building.

B. <u>Change Agent</u>: Jackson PTA and allies.

1. Role of the change agent is to act as contestant; work to have own side win.

C. <u>Basic Elements in Strategy</u>:

1. Issue dissensus - complete disagreement on:

a. Whether an issue exists

b. How an issue is to be resolved.

D. <u>Objective of Change Agent</u>:

To cause the board to rescind its decision to close Jackson School.

<u>Objective of Board</u>:

To stand firm on its decision to close Jackson School.

E. <u>Task</u>:

Develop a plan for achieving the objective, using the conflict strategy.

The key to conflict strategy is that there is no consensus about the issue. The Jackson PTA and its allies are at loggerheads with the Board of Education, and the issue cannot be resolved by using the collaborative or campaign strategy.

Before making a decision to use the conflict strategy, the change agent should consider the risks very systematically, perhaps by using the risk technique (Chapter 10, p.102) or force-field analysis (Chapter 10, p. 106), and be prepared to accept the consequences. In addition, the group should prepare carefully for the confrontation. It is necessary to clearly state the issue and stick to it. This means planning who is going to say and do what. It also means not permitting the other side to cloud the issue by diverting attention to other matters or going off on tangents. However, it is also important to plan an up-front and a fall-back position, i.e., a clear and assertive statement of what you want, but also a quiet agreement among your own group as to what you will settle for. This allows room for negotiation.

One author suggests four additional considerations: (1) separate the people from the problem; that is, discuss issues, not personalities; (2) focus on interests, not positions; that is, try to relate the conflict to basic human interests and needs, and try to discover interests both sides share; (3) invent options for mutual gain, in an effort to create a situation in which everyone wins something; (4) insist on objective criteria, which enables negotiation on the basis of principle, not pressure.*

*Citizen Participation Newsletter, December, 1982, No. 16 (Morgantown, West Virginia: West Virginia University Cooperative Extension Service, 1982), pp. 1-3, citing Fisher and Ury, Getting to Yes (Boston: Houghton Mifflin, 1981).

If your group has chosen to use the conflict strategy and has been successful, it may be very wise to consider how best to restore a good relationship with the other side. Chances are that the campaign and collaborative strategies may be useful approaches in future relationships.

In summary, the collaborative strategy is appropriate when there is _issue consensus_; the campaign strategy when there is _issue difference_; and the conflict strategy when there is _issue dissensus_. In choosing a strategy, a group must also consider its own style, the social environment in which it functions, and the possible consequences of its choice.

12. Forming Partnerships

Every group has a number of direct and indirect contacts with other groups and organizations that may lead to partnerships. Direct contacts often occur in joint community projects. Indirect contacts are those made when members of one group also are members of other groups, or interact with those in other groups. Both direct and indirect contacts are an important part of a group's life and have a strong influence on what a group does and how it goes about doing it.

Direct contacts among groups take place for a variety of reasons. An activity may be too large for one group to handle and other groups may be invited to take part. A successful pilot activity by one group may grow into a project that will need the involvement of several groups. The very nature of an activity, such as an arts and crafts festival or a community-wide celebration, may require the active participation of a number of groups and organizations. One of the important points to keep in mind is who initiates the contact and who gives direction to whatever joint activity occurs.

The group initiating the contact has the responsiblity to spell out very clearly what it is asking of other groups, how tasks will be shared, how communications will be maintained among the groups involved, and who will coordinate the joint activity. Too often these matters are not adequately discussed and agreed upon in advance. Thus, a situation is created that leads to confusion, misunderstanding and mistrust. For groups to work together, they need to know as much as possible about what is expected of them before work begins. This is particularly important because almost every joint activity involves a different combination of groups. What worked in one joint effort may or may not work with the next activity involving a different mix of groups. There are at least three ways through which these direct contacts may be carried out: (1) linkages; (2) coalitions; and (3) coordinating councils.

Linkages

Group linkages are ties or bridges that promote information sharing and allow each group to draw upon the resources of the others. Such contacts can be maintained through periodic telephone calls or face-to-face contacts among representatives of groups, or an exchange of newsletters and other materials that describe current activities and future events. The purpose of these contacts is to maintain communications among a number of groups and organizations. They help keep everyone informed of each group's activities, thus minimizing such possibilities as several groups holding important meetings and events on the same day or working independently on similar projects. The contacts or linkages also help identify resources within one group that might be shared with other groups.

Networking has become a popular and, perhaps, overworked term to describe linkages in action. A network, or system of linkages, establishes a ready resource of information, advice and other services that any group in the network may request from any other cooperating group. The important point about linkages--and the reason they function--is embedded in the notion of exchange. One group calling upon the resources of another group must be ready and willing to reciprocate. This arrangement suggests that each group involved has something potentially useful to or needed by the other groups. The network is kept alive and healthy by groups using it.

How formal should the system of linkages be? It seems to work best when linkages are kept quite informal. Each group should be aware of the other groups that are willing to cooperate; the nature, resources, and activities of each group; and the contact person for each. With this knowledge, the group is prepared to use the system as it is needed. The number of contacts will vary from time to time and from group to group, but the ties have been established and can be activated, thus creating an informal partnership among groups.

Such linkages can help each group to carry out its programs and activities more effectively.

Coalitions

Linkages essentially are simple, informal avenues of contact among groups. If something beyond informal contacts is needed, the groups should consider forming a coalition or some type of council. A coalition is made of two or more groups who cooperate in a specific activity, usually over a specified time. For the particular activity that brings them together and for the time it takes to accomplish it, the groups will act as one organization. To be successful, therefore, a coalition must be carefully put together so that everyone involved understands the responsibilities and commitments of each of the groups, how the effort will be carried out, and how coalition decisions will be made.

For example, groups in one community decided to sponsor a street fair to inform the public of the services provided by local social service agencies. Six clubs and organizations formed a coalition, with the street fair as their specific focus. One group assumed responsibility for working with city officials and local merchants to get booths set up in the downtown area. Another group agreed to contact all the social service agencies about displays, assigning space, etc. A third group worked with radio and television stations and the newspapers to arrange publicity. Other groups took other assignments. A general chairperson was elected by representatives of the groups, and coalition members agreed to meet weekly, beginning several months in advance of the event. After a very successful fair, the coalition met once more to review and evaluate the event and complete any unfinished tasks. They also agreed to sponsor the activity again the following year and elected a new general chairperson. Then the coalition discontinued its meetings. There was little or no activity over the next eight or nine months; then the coalition called the first of a series of weekly meetings to begin work on the second event.

In this example the groups combined their efforts to carry out a specific activity (the street fair) over a limited period of time (about three months). Each group accepted certain responsibilities and each had coalition representatives working under the direction of a general chairperson elected by the coalition. Weekly meetings kept everyone informed about progress and helped to keep efforts coordinated.

This example illustrates a form of coalition that leaves action to the separate groups. In another model, representatives of groups come together to take joint action. In the case of the street fair, the authority for action remained with the groups which formed the coalition. The responsibilities were carried out by the separate groups and coordinated by the coalition. In this second approach, activities are carried out by the coalition itself. Groups delegate authority to the coalition for a specific purpose. Such an arrangement is particularly effective when a social or political issue is involved and the groups want to coalesce around that issue. An example would be an effort to prevent the location of a hazardous waste disposal facility in an area. This second type of coalition has greater strength and can act more quickly.

Why does a group form a coalition or become a part of one? The most obvious answer is that a group needs resources beyond its own (e.g., people, money, experience, etc.) to carry out some specific projects or activity. These resources are often available in another group or groups. Frequently, groups realize that a coalition may be the only effective way to address a community issue.

The second answer to the question lies in the cooperative attitude and sense of civic responsibility shared by at least some members of almost every group. There are many instances in which more can be accomplished, larger projects undertaken, and the whole community involved if a partnership is formed among groups willing to work for the same objective. Not only is there a greater likelihood that the project will be carried out, but also that community citizens will feel a strong sense of accomplishment for their efforts and be motivated to participate in future joint ventures.

Coordinating Councils

Coordinating councils, permanent forms of coalitions, usually deal with a broad range of community activities rather than a single project. While their structure and functions vary widely, their major purpose is to bring together representatives of several groups in joint efforts. Such councils may simply share information and serve as a sounding board for community concerns and new proposals. On the other hand, a council may be authorized by its member groups to make decisions and undertake specific courses of action.

While a coordinating council requires a certain commitment from each participating group, including a willingness to work in partnership with others, it may also:

1. Sponsor activities that not only are manageable by individual groups, but also may be far more significant and successful than the total of individual group efforts. For example, the accomplishments of a council-sponsored citywide youth event may far exceed what could be accomplished by separate efforts of member groups.
2. Promote better understanding of separate group efforts. Awareness of individual group projects can lead to better overall coordination of community activities.
3. Provide specific services to member groups; for example, bringing in consultants to help with specific problems such as fund raising and publicity; and making joint purchases of supplies to curtail operating costs for each group.

If your group has not attempted to form partnerships with other groups through linkages, coalitions or councils, it has limited itself. Partnerships bring together resources and expand the possibilities for more comprehensive community projects.

Indirect Contacts

Indirect contacts, interaction among members from different groups, represent an informal way to help groups relate to one another. All communities have individuals who belong to numerous groups and organizations. These individuals frequently serve each group well, and also perform a valuable function in maintaining communication among the groups.

A person attends a service club luncheon, for example, and listens to a committee report that proposes a new summer youth program to be sponsored by the club. The individual has just come from a neighborhood association meeting at which a decision was made to raise money and recruit volunteers for a summer program for inner-city young people. If the person tells the service club members about the neighborhood association plans, a cooperative project effort may evolve. Even if the two groups decide to carry out independent programs, at least each knows what the other is doing. (A training exercise for group leaders, designed to emphasize the value of indirect, informal ties between groups, may be found on page 117.)

Indirect, informal ties are more prevalent than most people realize. Leaders who recognize the potential usefulness of these ties can enhance communication and coordination among groups. The first step in building indirect contacts is to learn what other groups your members belong to. The next step is to ask them to serve as informal links between your group and the other groups to which they belong. Finally, you must be alert to their reports about what other groups are doing or planning to do. In this way, your group will keep abreast of action or planned action in other groups in the community and discover opportunities for possible joint efforts.

13. Financing Special Projects

Getting the money to initiate a new project or continue an ongoing program is difficult and time-consuming. Many groups are seeking funds; all the foundations and granting institutions are besieged with requests. The same fund-raising ideas are used over and over. Groups sell products (e.g., light bulbs, candy bars, cookies), sell tickets to all types of events (e.g., circuses, rodeos, concerts, breakfasts), and hold drawings with prizes ranging from toasters to new cars. Bake sales, bingo parties, card parties and other types of fund-raising events are sponsored by local groups, frequently on a regular basis. In addition, many groups seek major funding for programs and activities that require greater resources than can be secured through rather modest fund-raising efforts.

If yours is a new group or a group just beginning to look for some financial support, how do you go about seeking funds? If you have been conducting regular fund-raising activities for some time, how recently have you reviewed them? In either situation, one way to begin is to look at your funding needs and consider the special conditions related to each. Four types of funding needs are reviewed here: (1) money to help support a favorite cause, (2) seed money or initial funding for a project, (3) capital costs if major equipment is needed or a facility is to be built or renovated, and (4) operating expenses to support an activity on a continuing basis.

Money for a Favorite Cause

Many groups raise money, frequently on an annual basis, for their favorite cause. In most cases, groups use the same fund-raising technique each year and continue to use the profits (total amount raised less expenses) for the same purpose. Service and civic clubs, for example, raise money for specific groups such as the blind or crippled children, or for special purposes such as medical research or sending children to summer camp. Most of these fund-raising efforts: (1) give people something of value for the money rather than simply ask for a donation; (2) use members of the group to conduct the fund-raising effort, and (3) concentrate the effort in a limited period of time.

When you give people something of value, the question for both the group and the potential contributor is whether the item is priced low enough to sell yet high enough for the group to profit. If an item costs a group \$2.00 and members sell it for \$2.50, the price may be attractive to buyers, but the group must sell 1,000 units to raise $500.00. On the other hand, if the item is priced at $4.00, potential buyers may consider it too high. The group may not sell even the 250 units necessary to raise the same amount of $500.00. Try to establish a price that your buying market can support.

Fund raising through sales is conducted by group members in a limited period of time. Extended fund-raising activities are difficult to manage and frequently produce less desirable results than a short, intensive drive. It is easier, for example, to get cooperation from members if you ask them to give up a Saturday or two evenings rather than expect them to participate in an extended campaign.

Perhaps the most difficult problem for your group will be deciding what to sell. Ideally, the item should be something that most people need or feel they will use, a relatively low-cost item that can be offered at a reasonable price, and something not sold by other groups in the area. These conditions are difficult to meet, but essential. Whether your fund-raising efforts for a favorite cause are successful will depend in large part upon your meeting the conditions.

Seed Money

New projects or programs usually need money to get started. As the name seed money implies, it is money used to begin something. Usually the funding source discontinues support after initial project funding; that is, after it "seeds" the project. Unless there is a reasonable chance that money can be obtained to continue, your group may not want to accept seed funds. This is a matter that deserves great consideration. Starting a project and then being forced to close it after a brief period because the seed money runs out may be worse than not undertaking the project at all.

The federal government, foundations, and corporations make grants to initiate new programs, and in some cases will continue to provide at least partial support for a few years. After that, the project must look elsewhere for continuing support. While the government is a major source of seed money, it does not fund many of the kinds of projects in which groups are involved. In addition, the accounting procedures and reporting requirements are more than many groups are equipped to handle. Unless your group has staff who can be responsible for day-by-day administration, maintaining financial records, and preparing periodic reports, you should look to other sources. It might be possible for your city to receive funding, and for your group to subcontract to provide a specific service or program as part of the city's project.

Most foundations receive requests that far exceed their resources, so they look for projects with new or innovative approaches. Keep in mind, however, that a project new to your group may not interest a foundation if that project has been implemented elsewhere. Many foundations emphasize a particular area of concern, such as youth employment or rural health services. Be familiar with a foundation's special interests before making any contact. The Foundation Directory, available in most local libraries, will help you. It lists foundations alphabetically by state and includes for each the address, the names of officers and principal staff, and a brief statement about the foundation's purpose and major funding interests. The directory's index will help you identify foundations that make grants in the subject area of interest to your group.

When foundations are discussed, people generally tend to think of major philanthropic giants such as the Ford and W. K. Kellogg Foundations. A review of The Foundation Directory, however, will show you that there are many foundations, and the nature of them can be quite different. You may be more successful requesting seed money from a small or specialized foundation than a larger and better known one.

In many localities, small, private, and community foundations have been established. Frequently, local bank officers serve as their trustees. Once or twice a year they accept and review requests for money and award small grants. The total allocated each year may not exceed $10,000, and individual grants may be as little as a thousand dollars. Grant procedures for community foundations are usually simple, and the time between submitting a request and receiving an answer is brief. Check with your banks to see if such grant programs are available and, if so, how and when money is awarded.

Do not overlook corporations when your group seeks nonprofit funds. Many large corporations have established foundations or funding programs, and have assigned responsibility for their management to their own personnel. Procedures for requesting funds usually are rather simple, and requests are acted upon quickly. If your proposal does not require a large sum of money and the project will benefit the community, you may have a good chance of receiving support.

If you seek funds from foundations or corporations, you may need to establish group tax exempt status. A knowledgeable person either within or outside your group can help you. You may also be asked to submit a grant application. If so, you should include a cover letter that identifies your group and helps to establish its credibility. The letter also should describe the purpose, background, amount requested, personnel, duration, outcome and evaluation of the project. The letter is important because it is the first thing the grantor will see, and it may determine whether the detailed information in the grant application is read.

Capital Costs

Projects frequently require a capital outlay for major equipment or for construction or renovation of a facility; for example, a van may be needed to transport patients to and from a clinic. A new activities building may need to be constructed at the summer youth camp, or the community center hopes to add a library and lounge for senior citizens. While many government agencies and foundations do not make grants for capital costs, other funding sources not only do, but also give such requests high priority.

Two advantages to the potential donor of money for capital costs are: (1) it is a one-time gift and, therefore, in no way commits the donor to an annual gift of money, and (2) it is tangible and can be identified as given by the donor. Campaigns for capital expenses frequently emphasize this second point. An example of this is when a donor makes a gift large enough to pay for constructing a room and his or her name is placed on the door.

Sometimes small community foundations and wealthy individuals are more interested in giving for capital items than for seed money or operating expenses. With individuals in particular, it is important for you to know their special interests and who can best approach them. Community foundations usually have a few simple guidelines for grant requests and will tell you what grants have been awarded in recent years. Such information will help your group decide whether to submit its capital request to a particular community foundation.

Some groups appeal to the general public for funds for a capital need. For example, more than one local service club has successfully raised enough money to buy an ambulance or emergency vehicle. Swimming pools, tennis courts and baseball fields have been built in many communities as a result of a capital campaign spearheaded by a civic club or other local group. The key elements in a successful capital campaign are to state clearly why the money is needed, how much is needed, and the timetable involved. As in any activity of this nature, careful planning and a well-thought-out timetable are essential for success.

Operating Expenses

Raising money for operating expenses is the most difficult fund raising of all. Most government offices, foundations and corporations are not interested in providing money for operating costs. If your group needs to raise a small amount on a continuing basis, it may want to sell products or engage in other traditional fund-raising events. But if the group needs to raise a larger sum of money on a regular basis, it probably should consider one of these options: (1) an annual fund-raising campaign through direct mail appeal, individual personal solicitation, coin containers in stores, or similar approaches; (2) working to make the project as self-sufficient as possible through charges for services; or (3) combining the project with the program of an existing social service agency or seeking membership in the local United Way.

An annual campaign for operating expenses may take more time and effort than your members are willing to give. Lists of prospects need to be developed, supplies ordered, campaign dates established, volunteer solicitors organized and trained, etc. Even if you can mobilize the volunteers and handle all the details of supplies and arrangements once, you may not be able to do it annually. Your volunteers may burn out or your members may devote so much time to fund raising that other group interests suffer. You may find it advisable to consult a professional fund raiser for assistance. Your local United Way director may be able to suggest names.

In some instances, project operating costs can be supported through volunteer work and charges for client services. For example, a van purchased with seed money from a community foundation may operate without outside support. The use of volunteer drivers and small fees for van users may cover the cost of gasoline, insurance, and maintenance, and keep the van operating for years. Other projects may not have self-sufficiency potential but at the same time are able to bring in some money for operating costs.

If your group has established a community project that meets a community need, it might ask an existing agency to assume responsibility for the service or request the United Way to fund it. To be funded by the United Way, a project must exist as a separate program with its own board of directors and meet specific requirements. Sometimes a project serves better as a community function than as a program of a single group. Moving a group project to one that is a community function will free group time and energy for other activities and make your former project an integral part of the community's social services.

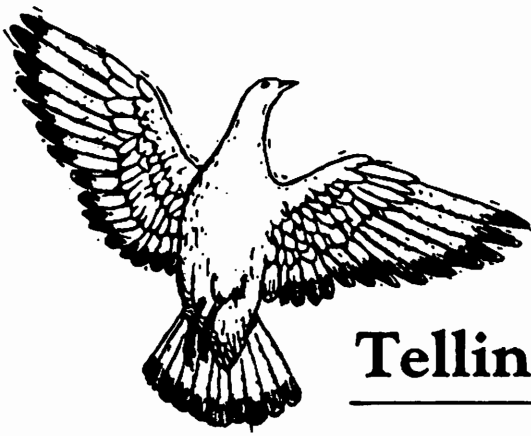
Suggestions for Fund Raising

The following suggestions apply to all fund-raising efforts:

1. Clearly identify how much money your group is seeking and for what purpose.
2. Plan carefully so that materials are available and arrangements are complete when the fund raising begins.
3. If your group is selling an item, make sure it is something that people need or will use. Concentrate your efforts in a limited period of time.
4. If your group is contacting a foundation or corporation, know as much as possible about its funding activities.

5. If your group is seeking money for capital needs, look first to community foundations, corporations and selected individuals.

6. If your group needs to raise money for operating costs, achieve as much self sufficiency as possible or become part of the array of local community services.



14. Telling Your Story

If you are involved in community action, you have a story to tell. And that story must be told in order to report accomplishments...build support... gain cooperation...recruit volunteers... maintain the organization's credibility...provide models for action.

Whether you call it publicity, communications, or public relations, it is imperative that you keep the community informed from the beginning of a project to its conclusion. If community residents have a clear understanding and appreciation of what the project has accomplished, community support will be easier to gain the next time you launch a project.

In most cases, the goal of public relations is to gain support through reaching large numbers of people or audiences, but remember that on occasion you need to target key people. These people, sometimes called legitimizers, may have the power to help a project succeed or fail.

Your organization or project image is largely in the hands of its public relations chairperson or director, and that image needs constant care, protection and building. Ideally, an organization develops a positive community image before starting a project. The project itself, however, often needs some image-building. It is important, therefore, that the public relations chairperson be knowledgeable and enthusiastic about your organization and project as well as knowledgeable about public relations techniques.

The first consideration of any public relations venture is the audience. A good place to begin is with the membership of your organization and those associated with the project, insuring that they are kept fully informed. A good base of understanding within the organization is essential. When this is accomplished, you can identify and target outside groups for special attention. It is usually true that one approach to public relations will not be suitable for all segments of a community, so tailor each effort to a specific target, if possible. Some efforts will have a broad audience, perhaps the entire community.

Develop files that will help you tell your story, and keep them current. One file should contain background information on both the organization and the project, with facts outlined in a clear, concise format which can be easily reproduced. Include in this file appropriate photos as they become available, also quotable quotes. Another file should contain press and broadcast media contacts. Call the newspaper, radio and television stations to get information that you can enter into a log or on a form that has such headings as: media name, contact person and availability, initial contact date, deadlines, date material sent, outcome, and follow-up. Glean as much information as possible from the initial contacts.

In general, a public relations chairperson should be creative and not easily discouraged. If one publicity route collapses, there are others. Often one type of publicity attracts another. For example, in a midwestern town where many organizations sponsored card parties to raise funds for charities, one group had a temporary setback when it learned that its advance publicity would be minimal (a paragraph in the "coming events" column of the newspaper). The group had requested the newspaper to take a photo to alert the community to the fund-raising card party, but when that publicity avenue closed, the chairperson opened another. She requested and received permission from town management to block two parking spaces at the busiest intersection of town. Then she recruited four members to set up a card table in the middle of the parking spaces and actually play a serious game of bridge. On the sidewalk, other members displayed colorful posters which advertised the card party; some sold tickets. Crowds gathered and tickets were sold. But the most satisfying part of the event, for the publicity chairperson, was that when the newspaper editor learned about the four women playing bridge in the street, he sent a photographer and the group had front-page coverage. The publicity chairperson, who understood that methods of alerting the community to a group project are unlimited, had created an event that created publicity.

Print Publicity

Newspaper publicity is important because it can give the public complete information on your project. Sunday newspapers and local sections of daily or weekly newspapers are particularly good prospects for stories about volunteer projects. If you plan far enough ahead to allow flexibility in publication, your chances for coverage improve.

Inquire at the newspaper office to determine appropriate contacts (e.g., editor, reporter, feature writer, columnist or correspondent). Set up an appointment and make a get-acquainted call. Leave information about your organization with the contact person and request advice on how best to publicize a project or event. You may have a solid news story or an appealing human-interest feature, or you may be able to take advantage of a community calendar or special column for local events. If you have a project that will extend over a period of time, anticipate those periods when your publicity needs will be greatest and explain your schedule. The newspaper professional will appreciate a candid discussion of your project and publicity objectives.

Volunteer and group activities are particularly appropriate for feature stories (often called human interest stories). They are different from news items because they explore and expand information about people and subjects of interest to them. Generally, features are written by staff members on special assignment, but they may be prepared by free-lance writers. Group members may suggest to their newspaper contact person ideas for feature articles; or a good writer within your group might even prepare a feature. It could focus on a part of the total project or an interesting personality.

Consider asking your newspaper editor to comment about your project in an editorial. Consider also asking your own membership or others in the community to write letters to the editor that express personal viewpoints or thank the community for support.

When you request newspaper photo coverage, discuss the event with the photographer far enough in advance that he or she can suggest newsworthy photos. Then you can be sure that everything and everyone are ready at the appropriate time and the photographer is not kept waiting. (Always remember that media professionals are very busy. To maintain good working relations with them, respect their schedules.) Provide the photographer with a list of names, addresses and phone numbers of people in the photo. Include titles or job positions, if appropriate. When identifying subjects, number from left to right. Provide basic information for captions, remembering that more information will be required if a photo is to be used without an accompanying story.

If your group project can't have the benefit of a professional photographer, you can still have photos. Ask a member, or someone outside the group, who has a good 35mm camera to be your photographer. Be sure that most photos illustrate action. Use a limited number of people in each, usually not over three. Group photos of "just people" are exceptions.

Be ready for your first news event. A publicity chairperson can learn to write a good news release by practicing the few simple rules that follow:

1. Organize your facts. Include the necessary ones only, and do not use headlines.
2. Find a lead or opening statement that tells a basic fact and creates enough interest that the reader wants to know more. Because of the importance of a good lead, work on it diligently.
3. Complete the story, with answers to: Who, What, When, Where, Why, and How. Answer these questions as early in the release as possible. Do not include personal opinion or editorial comment. Avoid adjectives and unnecessary words.
4. Check and recheck for accuracy, particularly where names are concerned.
5. Type and double-space the release. Provide your organization's name, address, phone number, and name of contact person, in the upper left corner. In the upper right corner, give date and time for release of information, using the words <u>"For Immediate Release"</u> if appropriate. Use 8½x11" plain white paper, one side only, and allow 1½" margins. Avoid hyphenating words, and complete a paragraph at the end of a page. If another page will be used, write "more" at the end of the page. Use the organiza-

tion's name at the top of each succeeding page. Indicate the end by typing the symbol ###.

Wire Services

If your story warrants regional, state, or national distribution because it has high news value or unusual human interest, try the wire services (e.g., Associated Press [AP] and United Press International [UPI]). Your contact is the bureau chief at the nearest bureau wire service office or the local correspondent for the service. Ask a local newspaper professional how to make the contact if you cannot find a number in the local phone directory.

When you write for the AP or UPI, include only the essentials, and keep the item brief. Put all important facts in the beginning so that the item can be cut, if necessary, without being rewritten. The more rewriting required, the less apt the item is to be used.

Magazines

Your project story may be of interest to a magazine. If you believe it is, think about the magazines that often use the type of material you would submit. The Writer's Market, published annually by "Writer's Digest," and available in reference libraries, provides a list of magazines and periodicals for writers to consider. Zero in on a publication, study its style and format, then contact the editor. He or she may request a follow-up story outline. If so, volunteer to assist with the development of the story and serve as contact person. Keep in mind that you must work months ahead of publication, and you must meet specified deadlines. You might consider using a free-lance writer to prepare your story, in which case the writer would work with you and then sell the story to the publication.

Broadcast Publicity

There is great potential for public relations in the broadcast media (i.e., commercial and public television, cable television, and radio). Public service announcements (PSAs) and community calendars can be quite helpful to publicize an event or activity. But there are other possibilities, such as interview shows, talk shows, special appearances, and panel discussions. Your activity may even qualify for a newscast or a broadcast editorial. Remember, however, that competition for public service time as well as time for news and special programs is intense.

Developing appropriate contacts is just as important to get electronic media publicity as it is to get printed media publicity. If your goal is participation in a program or special show, you probably need to contact the producer. News is the responsibility of the news director, and there is usually a public service director to handle public service announcements. If you're not sure who to contact, call the station office, explain what you want, and ask to be routed to the appropriate person. Once you're in the presence of this individual, provide background information on your organization and the project. Keep in mind that the person to whom you're talking is busy. Go prepared so that you will state only essentials. Prior to your appointment, monitor the medium, and prepare to ask questions about program preparation time and technical requirements.

Be prepared to explain your goals concisely, supported by typewritten backup material. Suggest ideas that will have wide appeal for the viewing or listening audience, but be sure suggestions are appropriate for the station's capabilities. If your ideas are not readily accepted, use the visit as a learning experience and begin preparing for the next time. This is an opportunity to practice good public relations on a one-to-one basis.

When you suggest someone to represent your group on television or radio, choose carefully, because he or she projects an image of the organization. If the medium is television, ability of the person to appear comfortable while on camera is very important. So is the personal appearance of the individual. This representative should be well-prepared to make a presentation or answer questions. Questions and responses should be brief (about 20 seconds). In preparation for an interview show, the individual should provide the station representative with a biographical sketch, appropriate topics for discussion, and basic information about the organization. You may need to seek help from local public relations professionals as you prepare materials.

Don't ignore the possibility of cooperation from a cable television station, if one is available in your community. Suggestions for creative public service programs are often welcomed with enthusiasm.

Keep the lines of communication open with broadcasters and journalists, and if news releases are distributed to papers, send copies to your broadcast contacts. If you write news releases specifically for broadcasters, try to keep them under a page in length, and if necessary, attach a fact sheet with additional information. For broadcasters, provide phonetic spelling of names that are difficult to pronounce.

Keep an eye out for celebrity appearances, and get to know local personalities such as commentators and disc jockeys. You may be able to convince a popular personality to endorse or publicize your project or organization.

News Conferences

When there is an obvious need to call together media representatives for a major announcement, plan a news conference. Use this publicity technique with caution, however. The credibility of your organization and project will be damaged if the news value is questionable or if conferences are held repeatedly without good cause.

Once you have determined the worth of the announcement and the ability of your organization's representatives to tell the story, notify the news media by means of a written notice. Do this at least two weeks ahead of the event. Clearly identify your organization and the participants, and include a contact person's name and phone number. Explain the subject matter and purpose of the conference and provide background material. Follow the written notice with reminder calls just prior to the event.

Prepare carefully for the media representatives and their equipment, providing ample room and printed material (i.e., news releases, background material or fact sheet, photos, appropriate displays or examples). Make telephones readily available, and serve light refreshments.

A news conference should last no longer than 30 minutes. The format is simple: a presentation followed by questions and answers. Participants should also make themselves available for interviews and photos following the conference so that media representatives may achieve individuality in their work.

Prepare participants to answer questions, the meat of a news conference. And don't forget to place your speaker's table or podium against a light-colored background that is clear and uncluttered. Display the name or logo of your organization or project where it is likely to appear in the background of photos.

If a large function is planned such as a convention or major conference, and you have asked media representatives to cover the event, furnish a media room to serve their needs. Be sure there is adequate lighting, and that telephones, electrical outlets, typewriters, paper, carbon paper, etc., are available. Arrange a separate area or room for interviews, if possible.

Audio-Visual Techniques

Audio-visual possibilities for publicity include simple photos, flip charts, slides, video tapes, color films and interesting combinations of these. Whatever medium you choose, be sure one or more members of your group can operate the necessary equipment (e.g., movie or slide projector).

Photos. It may be true that one picture is worth a thousand words; certainly photos are effective. They are also versatile. They are useful to newspaper and magazine editors to add color or human interest to a page of copy. Photographs can be used to illustrate a story as well as to become the story itself.

A good photo might also be used for television spots, slide programs, brochures, posters, or bulletin boards. If a photo is exceptionally good, you can have it enlarged and place it in strategic spots throughout the community.

Photos for publication are usually 5x7" or 8x10" black and white glossy prints. On the back, number each one, using a non-photo-blue pencil. On a sheet of paper, prepare a caption for each photo that identifies individuals and subject matter. Number each caption to correspond to the number on the back of the photo. If you mail the photos, provide protection by placing them between pieces of cardboard and indicating on the mailing envelope that it contains photos.

Slides. A 35mm slide presentation is an inexpensive method of communicating your project story, and it can be updated easily. The slide projector can be operated manually as you speak, or automated narration can be used, with music and sound effects recorded on a tape cassette. This medium provides great flexibility.

Video tapes. Compared to normal television production, video tape presentations are inexpensive and can be produced by qualified volunteers. Video tape is adaptable to both regular telecasts and cablecasting and can become a major tool for public relations.

Films. Films are effective but expensive. The cost of a 30-minute color film may begin at $40,000. If your television station has covered a project event, investigate the possibility of adapting the TV film for use by your group. Or approach a photography club or student group and offer your project as subject matter.

Flip Charts. The simple flip chart is an excellent means of communication in certain circumstances. Those who are inexperienced at making presentations particularly like using the flip chart because it serves as a tangible support, instills confidence, and helps them tell the story.

Flip charts can be produced inexpensively and used creatively. Photos, drawings, other graphics, and copy can be combined to tell an interesting story of your project. Be sure to make the flip chart graphics large enough, taking audience size into consideration. The charts are portable and can be slipped into a case or rolled up. Easels are usually available wherever presentations are made.

Alternatives to Media Coverage

In addition to media coverage, develop and use imaginative methods of alerting community residents to your organization or project or both.

Put your story on paper, in one form or another, and see that it reaches the general public or certain segments of the public. This can be done through direct mail (getting names from the phone directory or lists targeted to specific audiences); handouts distributed to shoppers, sports enthusiasts, theater-goers and other groups; inserts in business or organization mailings; or any combination of these methods.

A brochure that describes your organization and its projects is a good investment if it is concise but informative, written well, and attractively presented. It can have wide distribution and lasting value. Take special care in preparation of a brochure because it will affect the image of your organization or project.

News of your project can be inserted into company publications, news bulletins and advertisements of all kinds, including newspaper and magazine ads and outdoor advertising. Of course, these methods will require special permission and cooperation. For example, ask a local newspaper advertiser if a message about your project can be inserted in a corner of an ad.

Use eye-catching displays in lobbies of commercial and public buildings, at theaters, banks, churches, grocery stores, libraries, farmers' markets, shopping malls, and any location with a good traffic pattern. Consider placing exhibits at events such as fairs, trade shows, conventions, parades and competitive games.

Your community officials may cooperate by allowing you to stretch a banner across a major street or intersection. Posters produced in large numbers and strategically placed also can be effective. Consider a poster contest to develop interest. Bulletin boards can be used if permission is granted. Members can be prepared to speak before local groups. Your story can be told in many ways at community events. Alternatives are limited only by your imagination.

Special Events

The possibilities for special events are endless. Involvement of group members in a brainstorming session is an excellent way to generate new and unique ideas (page 101). In fact, this technique can be used at any juncture, but it is particularly useful when a chairperson needs help with ideas.

Community Meetings. Historically, meetings of community residents have been used to spread the word, as well as for decision making. A revival of the old town meeting might serve several purposes for a project that requires community understanding and participation. Certainly, it could result in positive public relations. To be successful, a community meeting must be planned well in advance, publicized and promoted vigorously.

Proclamations. At the community meeting, or at another time, a proclamation might be helpful. Long used, the proclamation still can attract attention and legitimize a project. A news story can be built around a proclamation. If this public information technique interests you, get an appointment with your mayor or governor, or one of their aides. Prepare a convincing presentation, and take with you a basic information sheet about your group and a draft of a suggested proclamation.

Demonstration of Need. At a community event, prepare members to give a demonstration which explains organization or project goals and, if possible, involves onlookers. Watch for opportunities to dramatize the need through a theatrical performance, public statements, puppet shows, or street theater presentations.

Parades. Create an event by scheduling a parade and recruiting organizations, businesses, and groups of all kinds to prepare floats or participate in other ways. The theme of the parade can focus attention on your project.

Open Houses. If your project lends itself to an open house, it is an excellent way to tell your story.

Seminars and Workshops. For in-depth involvement, hold a seminar or workshop on the subject of your project. Present the facts but be sure to allow time for questions and answers and participation by the audience.

Telethons. A telethon is a lengthy television program designed to solicit funds. It will take a major commitment of time and energy but pay off in wide exposure as well as contributions. Contact a local station representative and ask for information. It is possible that you might tie in your project with an annual telethon event.

Walk-a-thon. A walk-a-thon is a fund-raising effort which also provides publicity. Individuals and businesses are asked to pledge money for miles walked. The walkers provide good public relations; and if a celebrity or local leader participates, interest is heightened and publicity increases. (Consider also other marathon activities such as dance-a-thons, skate-a-thons, bike-a-thons.)

Awards and Recognition. Awards ceremonies or recognition given to program participants on any occasion can produce excellent public relations and result in news coverage. It's also good for morale. Awards can be presented at a special banquet or ceremony of some kind, at a community celebration or on a television show.

In addition to awards for program achievers, consider a media award for best news coverage. Whenever possible, show that you appreciate the efforts of news personnel.

Newsletters

Once you have developed a mailing list of organization members, program or project participants, and other interested parties, a newsletter might be useful. A newsletter can compete effectively for attention. With good layout and interesting content, you can communicate information, give recognition, or ask for help. If feasible, include photos or graphics, and use quotable quotes. If you are considering a newsletter, you might begin by collecting and studying those printed by other organizations and businesses. Ideas will then begin to flow.

Speakers Groups

As a project grows, it will be impossible for one or two leaders to assume complete responsibility for speaking engagements and other occasions when the project must be represented. The timing might be right for formation of a speakers' bureau or selection of a group of individuals who can handle requests, prepare speeches and assume responsibility for all communication relating to speaking engagements.

Campaigns

Telling your story should be a well-organized and continuous activity. There are times when special needs arise which require a concentrated effort, the use of a series of public relations endeavors, sometimes called a campaign. A campaign must be planned from beginning to end with great care. It may be handled by professionals, with continued involvement of group members to keep activities on track, but volunteers also can mount effective campaigns.