



Stronger Economies Together

Doing Better Together

Civic Engagement Forum

Lionel J. Beaulieu, Purdue Center for Regional Development, Purdue University
Chance McDavid, Southern Rural Development Center, Mississippi State University

REGIONAL SET FORUM: SHAPING THE REGIONS ECONOMIC FUTURE

PURPOSE OF THE FORUM:

Residents are more likely to embrace the proposed solutions to local problems when offered the opportunity to voice their opinions and offer their insights on the important opportunities and challenges present in their community. Furthermore, they are more likely to welcome the opportunity to actively participate in putting proposed solutions into action.

The regional forum represents a valuable opportunity for local people to engage in discussions and deliberations about the assets of local communities and the issues that are limiting their ability and that of the region to realize their full potential.

PRE-FORUM GUIDELINES

POTENTIAL PEOPLE TO INVITE

As the region prepares a list of people to invite, consider a broad range of community people who represent different sectors and segments of the population in each of the counties within the region. To ensure the forum accurately captures the pulse of local residents, the SET team must identify and invite a diversity of people to the forum – individuals who can offer different viewpoints and perspectives on ways to advance the well-being of the SET region. The mix of people to invite could include:

- Industry and financial leaders
- Representatives of faith-based organizations
- Entrepreneurs/small business leaders
- County Extension Service personnel
- State and federal Congressional representatives or staff
- Local and regional government representatives
- Minority and women-owned business owners
- Chamber of Commerce, economic development, and/or tourism organizations
- Workforce Development Board representatives from the area
- Educational leaders and organizations
- Nonprofit, voluntary and civic-minded organizations
- Community foundations
- Rural cooperatives

WHERE TO HOST THE FORUM

Selecting an easily accessible location is important, including paying close attention to the special needs of individuals with disabilities. The forum should be held in a location that is non-threatening or non-intimidating to individuals you want to participate. While city/town hall, the courthouse, or the Chamber boardroom may automatically come to mind as an ideal location for a forum, the SET regional team should assess whether these are inviting venues for those you want to attract to the forum. Perhaps schools, public libraries, county Extension offices, or community centers may prove to be ideal locations for achieving a good turnout.

SCHEDULING THE FORUM

The meeting should be scheduled at a convenient time for the target audience. Evening meetings may work best, but some communities may produce better attendance for a breakfast or luncheon event. If an evening meeting is the most desirable, consider resident's commute time from work to determine the starting time. In communities where many residents work out-of-town, a 6:30 p.m. starting time may be best; otherwise, a 5:30 p.m. starting time may be ideal. Again, it depends on the habits and commuting patterns of the residents. Because there is really no "best" day of the week that works in every community, polling key individuals to help select the day may be helpful.

PREPARING FOR THE WORK AFTER THE FORUM

Give thought to the work that will follow the forum as some important linkages will need to happen at this meeting. For instance, determine how the team will maintain contact with forum participants that do not choose to join the planning process in the future as the planning continues. Be prepared to communicate the opportunities to stay connected at the close of the forum.

Identify someone to collect the "About Me" forms and identify someone from the Planning Team that will maintain those contacts. As the team moves forward and identifies specific needs to build linkages in the region, this information may help quickly identify knowledgeable individuals who can help.

Assign someone from the Team to collect the flipchart notes at the close of the meeting and transcribe into a single document. These notes should be shared with the entire Planning Team prior to the next meeting for review.

SETTING UP THE FORUM SPACE

The area should be set up with round tables that will seat 6-8 people allowing enough space for the expected participants to fill all spots. Number each table and place the number so that it is clearly visible in the center of each table. Place a flipchart and markers at each table. Place “Ingredients for Success” cards or table tents on tables.

PREPARING THE POWERPOINT

The basic PowerPoint is provided for your convenience. However, some slides require customization before the session begins. For instance, you will need to insert your State Resource Team names and/or logos, the regional map, the agenda timelines, the Regional Data SnapShot: Civic Forum slides that correspond to the sections being covered in Round 3, and the SET coaching team’s contact information on the final slide.

MATERIALS NEEDED:

- PowerPoint for the forum (with regional information inserted – see above)
- Nametags
- Numbered sign-in sheet that matches number of tables
- “About Me” Forms
- Markers
- Pens
- Worksheet Packets
- Copies of the Regional Data Snapshot: Civic Forum for participants
- Flipcharts
- Sticky dots
- Table rotation materials (see below for suggestions)
- Computer
- Projector
- “Ingredients for Success” cards or table tents for participants
- Timer
- Future Involvement Sheet (an innovation from the field thanks to Dr. Dave Shideler, OK State University)
- Session Evaluation

PREPARING FOR PARTICIPANT ARRIVALS

Provide nametags for participants as they enter. Encourage them to just use their first name as this promotes an atmosphere of equality and relaxed discussion. Have a sign in sheet numbered down the side to match the number of tables you have. As people arrive, enter their names in order down the page and give them a sticky dot or card with the table number on it. This will be their assigned table for the first round. NOTE: Assigning people straight down the list as they arrive helps to break up groups that may have come in together, making for a richer conversation. Additionally, provide an "About Me" form [See Sample] that has more detailed contact information including the county in which they live, email, phone, address and employment or groups/organizations with which they are associated. This information will be helpful in determining what sectors have been part of shaping the civic forum outcomes.

TABLE ROTATION PROTOCOL

The goal of the rotation is to ensure that participants are mixed with different people at each round. You may do this a number of different ways. Here are a few possibilities. Feel free to adjust or adapt to meet your needs.

- Place a cup on each table that has slips of paper with the numbers of each table. For instance, if you have 10 tables, the cup would have ten slips of paper numbered consecutively from 1-10. At the close of a round, participants would draw a number from the cup to determine their next table. They could then deposit the slips back into the cup so the process can be repeated on subsequent rounds. This is quick and easy, but does require a bit of thinking about the number of tables you have and the number of seats at each table. For instance, if you have eight tables and eight spaces at each table, this is an easy 1 to 1 match. However, if you have more tables than you have spaces at each table, you'll need to stagger the numbers.
- The table facilitator goes around the table and gives the participants the number of their next table. Again, this takes a bit of forethought to consider how to ensure even numbers at all tables without overfilling the space at any one table.

WHAT IF THE TABLES ARE NOT ALL FILLED UP? If this happens, before the session begins, ask people from the highest numbered tables to leave those tables and fill in empty spots on lowest numbered tables so that participants are more equally distributed across all the tables. Be sure to leave one seat empty at a table or two in case latecomers need to be added.

SET CIVIC ENGAGEMENT FORUM: FACILITATOR'S GUIDE & KEY ROLES OF THE FORUM TEAM

FORUM FACILITATOR

This role is vital to the flow and effectiveness of the SET forum. The Forum Facilitator:

1. Helps create a comfortable environment for the participants.
2. Welcomes participants as they enter the meeting room.
3. Explains the purpose of the forum and shares the guidelines for a successful forum. (These are ground rules the facilitator should share with those participating in the forum.)
4. Briefly reviews the agenda (separate document) and explains the logistics of how each round will work.
5. Poses the questions for each round and makes sure the questions are visible to everyone.
6. Urges the participants to share their honest views of the topics being discussed.
7. Encourages people to engage one another at their tables.
8. Appeals to everyone to voice their opinions. The forum intentionally seeks out participants with different perspectives on the issues discussed during the forum, so having all people weigh in on these issues is important.
9. Moves around to the various tables to observe how the discussions are going. Discreetly lets the table facilitator know when it may be time to move on to another issue/item that the group needs to tackle during a specific round.
10. Ensures key insights are being recorded visually whenever feasible (i.e., flip chart paper) since this will help everyone to see the key points each table wants to share with the other participants.
11. **MOST IMPORTANT:** Stays impartial as the group weighs the various questions. It is critical that the facilitator does not share personal perspective on any of the items under discussion. The facilitator must truly remain neutral throughout the forum.

TABLE FACILITATORS

NOTE: AS THE FORUM FACILITATOR, PLEASE REVIEW THESE ROLES AND RESPONSIBILITIES WITH THE TABLE FACILITATORS TO ENSURE THAT THEY FULLY UNDERSTAND HOW THEY ARE TO CONDUCT EACH OF THE ROUNDS DURING THE COURSE OF THE FORUM. A TABLE FACILITATOR SHOULD BE ASSIGNED TO EVERY TABLE IN USE AT THE FORUM. A COPY OF THESE ROLES IS PROVIDED AT THE END OF THIS DOCUMENT TO USE AS A HANDOUT FOR TABLE FACILITATORS AS A REMINDER.

1. With the team at your table, review the specific questions they will address during the round.
2. Ask for a volunteer to serve as recorder and presenter.
3. Guide the group through each step of the round (as outlined in the meeting protocol).
4. Urge individuals to use the worksheet to jot down their ideas and insights.
5. During discussions, seek to engage everyone at the table.
6. Work diplomatically to prevent one or more persons from dominating the discussion.
7. Make sure the chosen recorder is capturing the main points of the group's conversation.
8. Secure the recorder's completed worksheet and turn it in to the meeting moderator at the end of the round.
9. Remain at the table when others leave for the next round; welcome new people to your table.

TABLE RECORDERS/PRESENTERS

NOTE: AS FORUM FACILITATOR, IT IS IMPORTANT TO TOUCH BASE WITH YOUR TABLE FACILITATORS TO ENSURE THAT THEY PROVIDE THE TABLE RECORDER/PRESENTER WITH BRIEF GUIDELINES ON HOW TO CARRY OUT THESE ROLES. FURTHERMORE, THE RECORDER/PRESENTER WILL DO THE REPORTING OUT DURING ROUNDS IN WHICH YOU, AS FORUM FACILITATOR, WILL BE CALLING ON EACH TABLE TO SHARE ITS FINDINGS AND RECOMMENDATIONS. PLEASE ASK THE PRESENTERS TO KEEP THEIR REPORTS SHORT AND TO THE POINT IN ORDER TO KEEP THE FORUM ON TRACK IN TERMS OF THE TIME ALLOTTED FOR EACH ROUND. A COPY OF THESE ROLES IS PROVIDED AT THE END OF THIS DOCUMENT TO USE AS A HANDOUT FOR RECORDERS AS A REMINDER.

1. Listen carefully to the discussion taking place at the table.
2. Capture all the key points and record these on the provided worksheet.
3. Prepare a clean copy of the worksheet used in each round. This worksheet should serve as the final version of your group's response to the various questions outlined in the worksheet.
4. Verbally present the team's report to the forum participants when called upon by the forum facilitator.

NOTE: Highlight only the key points. Avoid repeating items that other groups may have already presented. Only add issues that your group selected as a priority that haven't been discussed by any table during this specific round.

5. Submit the completed worksheet to the table facilitator prior to moving to the start of the next round of the community forum.

FORUM PARTICIPANTS

1. Share your honest views.
2. Listen carefully and respectfully to the views of others.
3. Only one person speaks at a time.
4. Speak from your own personal perspectives or experiences rather than on behalf of others.
5. Turn off or silence your cell phones.

NOTE: These are provided as table tents or cards for participants and will also be a PowerPoint slide discussed at the opening of the forum.

REGIONAL CIVIC FORUM: DETAILED GUIDE

WELCOME & INTRODUCTION TO THE FORUM [HAVE OPENING SLIDE UP WHEN PEOPLE ENTER]

15 MINUTES

WELCOME KEY POINTS:

- Welcome participants to the Stronger Economies Together Regional Civic Forum.
- Explain the purpose of SET: to help rural counties that want to work together identify and build on the economic assets of the region. [slide 2]
- Identify the SET funders and partners: SET is funded by the USDA Rural Development federal agency in partnership with the nation's four Regional Rural Development Centers and the Purdue Center for Regional Development. [slide 3]
- Explain how their region is one of more than 95 SET regions selected to participate in the Stronger Economies Together (SET) Initiative. [slide 4]

WHAT IS OUR REGION?

Provide a short explanation of the region in terms of which counties are included and a brief description of why those counties were selected as a region. Keep the description brief so that the schedule can stay on target. [slide 5 – insert a map of the region]

WHAT IS SET AND WHY ARE WE HERE?

Briefly explain the overview of SET and how the pieces will fit together. [Slide 6] Explain to participants how the civic forum will aid in the development and implementation of a strong regional economic development plan, one built on the assets of the region. Emphasize the importance of participants' input on the important issues and possibilities for the region, how they will form a platform on which the remaining planning work will build.

WHAT WILL WE BE DOING?

Show the agenda [slide 7] which includes specific topics that the forum participants will discuss over the course of the forum. Indicate that the process will require people to change tables for Rounds 2 and 3. Let them know that you will provide them with instructions prior to the start of each round. Then, share with them the ingredients for having a successful forum. [Slide 8] These can be placed as table tents on each table, given out as cards to each participant, or shared in other ways to help promote the session's success.

INGREDIENTS FOR A SUCCESSFUL FORUM.

Briefly examine the ground rules and gain consent for using them moving forward [slide 8].

Note: While this task is important, do not get bogged down in over-describing.

ROUND 1: EXAMINING THE STRENGTHS OF THE REGION [SLIDE 9]

25 MINUTES

MEETING FACILITATOR: PARTICIPANTS SHOULD BE ASSIGNED TO A TABLE ONCE THEY HAVE SIGNED IN. PLEASE MAKE SURE A TABLE FACILITATOR IS SCHEDULED FOR EACH TABLE (IDEALLY AN EXTENSION STAFF PERSON AND/OR USDA RD REPRESENTATIVE). AS SOON AS TABLE PARTICIPANTS ARE IN PLACE, THE TABLE FACILITATOR SHOULD RECRUIT A RECORDER/REPORTER FOR THE TABLE.

SET THE STAGE FOR THE FIRST ROUND OF THE FORUM BY SHARING THE FOLLOWING INFORMATION WHICH WILL BE HIGHLIGHTED IN THE POWERPOINT AS WELL. [SLIDE 9]

- a) We will begin by focusing on the communities and counties that make up this SET region. Without sharing with others at your table, identify the 3-4 most positive features of this region. That is, if someone were to ask you to describe the 3-4 best features of the communities and counties that make up the SET region, what would you say? Write these on the worksheet provided. (5 minutes)
- b) Next, share your list with other individuals at your table. As a table, discuss the various items that have been generated by the group. Have a recorder (or table facilitator) list the strengths on a flip chart page. (10 minutes)
- c) As a table, come to an agreement on the top 4 items that your group sees as the most positive features of the communities/counties that make up the SET region. Place a star beside these four items. Place your table number in the top right corner of the chart. (10 minutes)

[FACILITATOR: ASK VOLUNTEERS TO COLLECT THE CHARTS. WHILE PARTICIPANTS MOVE ON TO ROUND 2, HAVE A SMALL TEAM OF ASSISTANTS SYNTHESIZE THE ASSETS INTO ONE SUMMARY SHEET BY PUTTING ALL THE STARRED ITEMS ON ONE PAGE. POST ALL CHARTS TOGETHER, IF SPACE ALLOWS, ALONG WITH THE SUMMARY. IF SPACE IS LIMITED, ONLY POST THE SUMMARY. THE SUMMARY WILL BE SHARED BEFORE PROCEEDING TO ROUND 3.]

ONCE CHARTS ARE GATHERED, MOVE DIRECTLY TO ROUND 2 WITHOUT CHANGING TABLES.

Alternate process: Note this process takes more time but allows people to hear the results immediately. If you use this process, add approximately 20 minutes to the timeline.

Report out process: In order to get maximum information in the most efficient manner, call on the reporter for each table to share ONE positive feature that the table identified. Move to Table 2, then Table 3, and so on with each table adding one new feature identified. As positive features are identified, list them on a flipchart. Ask people to listen carefully so they don't repeat a feature that has already been listed. After giving every table an opportunity to respond, move to a second round asking for ONE new item from each table's list. If necessary, move through a third round of responses from each table if there remains new ideas that need to be offered or until all ideas are listed. When all of a table's ideas are listed, a table can simply "pass." [As the flipchart recorder writes, keep in mind that participants will be adding dots and will need room to place them next to their desired feature. It is better to use more than one sheet of paper than to try to pack all the responses onto one page if there are many suggestions. If more than one page is used, be sure all pages are posted when the next step occurs.] [10 minutes]

What makes you proud? Table facilitators hand each person four colored sticky dots. Invite the participants to place their dots on the chart indicating the FOUR features of which that person feels most proud or believes to be most important to the region. Explain that dots should be placed on four different items rather than putting more than one dot on a single item. [5 minutes]

Table Rotation: Provide participants instructions on the process for table rotation and ask them to find their new tables. [5 minutes]

ROUND 2: EXPLORING MAJOR CHALLENGES IMPACTING THE SET REGION [SLIDE 10]

25 MINUTES

Once the important strengths are gathered, change the focus to the key challenges currently impacting the communities and counties that are part of the SET region.

- a) Jot down on your worksheet what you view as the top 3-4 challenges you feel the region is now experiencing, or will be confronted with in the very near future. (5 minutes)
- b) Share your list and thoughts with people at your table. Each person should briefly share his/her list with other group members at the table, recording these on flip chart pages. (10 minutes)
- c) As a table, come to an agreement on the 4 major challenges that your group feels are having (or soon will have) a negative impact on the communities/counties that are part of the SET region. Place a star beside these four items. Place your table number at the top right corner of the page. (10 minutes)

Report out process: In order to get maximum information in the most efficient manner, call on the reporter for each table to share ONE of the top four major challenge that the table identified. Move to Table 2, then Table 3, and so on with each table adding ONE new challenge identified. As challenges are identified, list them on a flipchart. Ask people to listen carefully so they don't repeat a challenge that has already been listed. After giving every table an opportunity to respond, move to a second round asking for ONE new item from each table's list. If necessary, move through a third round of responses from each table if there remains new ideas that need to be offered or until all ideas are listed. When all of a table's ideas are listed, they can simply "pass." As the items are listed, leave space between for sticky dots.

Biggest concerns: Table facilitators hand each person three colored sticky dots. Invite the participants to place their dots beside the challenges on the chart about which they are most concerned and that need to be addressed in order to improve the long-term vitality of the region. Explain that dots should be placed on three different items rather than putting more than one dot on a single item. Before dismissing them, instruct them on table rotations so they will be seated back at their new table. [10 minutes]

Table Rotation: Provide participants instructions on the process for table rotation and ask them to find their new tables following the voting.

DATA SNAPSHOT OF OUR REGION

40 MINUTES

[NOTE: This portion of the session could be conducted as a working lunch/dinner with the data presentation happening as participants are eating.]

The SET Coach will provide a brief overview of the Regional Data SnapShot: Civic Forum. Ask participants to consider new strengths or challenges that the Data Snapshot presents which have not previously been identified in Round 1. Encourage them to jot their thoughts onto the worksheet provided as the presentation takes place. [Slide 11]

NOTE: PLEASE PROVIDE COPIES OF THE REGIONAL SNAPSHOT: CIVIC FORUM. AT THE END OF THE BRIEF PRESENTATION, PARTICIPANTS AT EACH TABLE WILL BE INVITED TO STUDY THE DATA IN GREATER DEPTH, USING THE QUESTIONS OUTLINED IN ROUND 3.

[Data slides should be slides 12-25 once inserted.]

ROUND 3: EXAMINING KEY DATA ON YOUR REGION [SLIDE 26]

30 MINUTES

Once the data presentation is complete, draw the attention of the participants to the questions they will be discussing. Ask them to consider the two questions below across the three major sections of the Regional Data SnapShot: Demography, Human Capital, and Labor Force.

- a) Were any new strengths identified in the Data SnapShot? Please write new strengths on the worksheet. Discuss these as a table and identify the top one to three strengths that emerged from the data.
- b) Were any new challenges raised from the Data SnapShot? Please list new challenges on the worksheet. Discuss these as a table and identify the top one to three challenges that emerged from the data.

Each table should record their top three strengths on one flipchart page and the top three challenges from the data on another flipchart page. Please be sure to put the table number on the sheet in top right corner in case there are follow up questions.

10 Minute Walking Break [Slide 27]: Gather the charts from each table and post them around the room with strengths grouped together and challenges grouped together. Have table facilitators assign new tables for participants using the protocol you have designed. Then ask participants to take a 10 minute walking break and read the charts posted from this round. Ask

them to consider what opportunities might exist in the region for enhancing strengths and/or addressing challenges. Bring ideas back to the table for the final round of questions.

Note table rotation protocol before dismissing for the break.

**ROUND 4: IDENTIFICATION OF OPPORTUNITIES TO HELP BUILD A STRONG REGION
[SLIDES 28-29]**

45 MINUTES

MEETING FACILITATOR: ASK THE PARTICIPANTS TO ROTATE TO A NEW TABLE USING THE PROCESS YOU HAVE IDENTIFIED. THEN SET UP THE NEXT ROUND USING THE KEY IDEAS PROVIDED BELOW:

This last round will capture final thoughts on ways to build on the strengths and address the challenges that exist in the region.

- a) [Slide 28] As a table, consider what opportunities might exist for enhancing our strengths or addressing our challenges. Take into consideration the following guiding questions: [Table Facilitators: list on a flipchart page as ideas are discussed.] [15 minutes]
 - a. What challenges might this opportunity help address?
 - b. What strengths might this opportunity enhance?
- b) [Slide 29] Given these opportunities what **could** we do? (As a table, what do we think is feasible and may have the greatest support and/or resources available to help?) [Table facilitators: walk participants back through the list they generated, and place a **check mark** beside the items that the participants believe could be done.] [15 minutes]
- c) [Slide 29 – click mouse to bring up second question]. Be sure people have finished the first question (what could we do) before showing this question (what should we do). Given these opportunities we could do, what **should** we do? Of the ones with check marks, what do we, as a table, think is most pressing or urgent?) [Table Facilitators: walk participants back through a discussion of the items that could be done (the ones with check marks). Place a **star** beside those that the table believes are most pressing and could lead the region to a positive win.] [15 minutes]

NOTE: There is not a set number of “coulds” or “shoulds” for this round; however, participants are encouraged to carefully consider these questions before selecting items.

FORUM WRAP-UP [SLIDE 30] [10 MINUTES]:

10 MINUTES

Ask participants if they have any overall comments regarding the information that has been generated. Any key observations?

- a) Explain what the SET regional team will be doing next with the information generated through the forum.
- b) Explain opportunities to stay engaged, including joining the planning process. Tell them how to join that phase of the work. Explain any other plans you have for continued communication.
- c) Ask the participants for their ideas on the best way to keep them informed and engaged with the work of the SET team as they develop a strong regional economic development plan.

CLOSING COMMENTS [SLIDE 31]

5 MINUTES

- a) Express your sincere thanks to those taking part in the SET forum.
- b) Remind people to turn in their "About Me" forms if they haven't already.
- c) Encourage them to sign up for future work. (See example "Future Involvement Sheet" sign up form in handouts.) [Future Involvement Sheet is an innovation from the field thanks to Dave Shideler, OK State University.](#)
- d) Close with the slide with the SET coaches' contact information inserted.

AFTER THE FORUM

Once the forum is over and participants have left, be sure to do these things:

- a) Make sure all report out charts are labeled with the Round number and table number (where applicable).
- b) Take pictures of all charts as a back-up way of preserving the rich data.
- c) Gather all charts together ensuring to keep them in a logical order so they can more easily be transcribed.
- d) The person that volunteered to type the notes takes them and converts them into a single document to serve as a record of the group. Once the notes are typed, they should be distributed to the SET planning team and reviewed prior to the next meeting.
- e) Gather all "About Me" forms and record the information in the way that best serves your follow-up communication plan. Keep in mind as you move forward that some of these individuals may serve as important links to help move SET along.

TABLE FACILITATOR RESPONSIBILITIES

1. With the team at your table, review the specific questions they will address during the round.
2. Ask for a volunteer to serve as recorder and presenter.
3. Guide the group through each step of the round (as outlined in the meeting protocol).
4. Urge individuals to use the worksheet to jot down their ideas and insights.
5. During discussions, seek to engage everyone at the table.
6. Work diplomatically to prevent one or more persons from dominating the discussion.
7. Make sure the chosen recorder is capturing the main points of the group's conversation.
8. Secure the recorder's completed worksheet and turn it in to the meeting moderator at the end of the round.
9. Remain at the table when others leave for the next round; welcome new people to your table.

TABLE RECORDERS/PRESENTERS

1. Listen carefully to the discussion taking place at the table.
2. Capture all the key points and record these on the provided worksheet.
3. Prepare a clean copy of the worksheet used in each round. This worksheet should serve as the final version of your group's response to the various questions outlined in the worksheet.
6. Verbally present the team's report to the forum participants when called upon by the forum facilitator.

NOTE: Highlight only the key points. Avoid repeating items that other groups may have already presented. Only add issues that your group selected as a priority that haven't been discussed by any table during this specific round.

7. Submit the completed worksheet to the table facilitator prior to moving to the start of the next round of the community forum.