Facilitator's Training Guide

Viable Futures Toolkits 1 & 2

SUSTAINABLE COMMUNITIES FOR ALL AGES
A VIABLE FUTURES TOOLKIT

Community Planning for Boomers
The Engine to Drive a Viable Future

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Acknowledgements

Preface
For the Facilitator –
Welcome to the Viable Futures Toolkit (VFT) Training Guide

This guide is a companion to VFT #1 and #2 (www.viablefuturescenter.org), which provide ideas and strategies for capitalizing on the challenges facing communities in the 21st century, especially those soon to be affected by the coming age-wave -- the doubling of our senior population (65+) over the next twenty years. Both Toolkits advance the point of view that today's social, health, and financial issues should be viewed as opportunities to move toward a common aspiration – a viable future for all ages. From this point of view, *all* generations are resources for their families and communities and potential allies on issues of their interdependent concerns.

While VFT #1 can be viewed as an "encyclopedia," providing deep planning tools, VFT #2 is its supplement, offering updates of best practices from throughout the country and streamlined planning strategies. In this Guide, you'll find a way to get up and running with the Viable Futures Toolkit in your community, no matter where you are in a planning and coalition-building process. The training will lay the groundwork for a process for communities to work together across generations in a holistic way to protect our human, financial, and natural resources and build a viable future.

The Guide has benefitted from the nonprofit organizations, government units, and community groups who have used the Viable Futures Toolkit. As our learning partners, they have raised probing questions about maximizing resources, sought greater clarity about the tools and their underlying point of view, and piloted versions of the tools in their work. Our hope is that this Guide will advance capacity-building further, so that a growing number of groups and organizations have the tools they need to do well by all generations.

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How to Use the Viable Futures Toolkit Training Guide

How to Use the ViableFutures Toolkit Training Guide

Here's some good news from the start: there is no single "right way" to use the Viable Futures Toolkits. Some users have found that *introducing* the viable futures perspective is most important; others have found that *using specific tools* best aligned with their present thinking is most helpful; still others have used the Toolkit in a more systematic *step-by-step process.* However it is used, we have found widespread agreement that a Viable Futures perspective can:

- give direction to the exciting opportunity (and increasingly crucial need) to step back from everyday work and think in new ways

- speak to a broad range of stakeholders

- offer the rationale and substantive "glue" for people to work together

- balance a big vision with specific work to get there

- make concrete the claim that generations have a great deal in common

- break down a "silo-ed" approach to understanding issues and making decisions

- optimize human, financial, and natural resources

How the Viable Futures Toolkit Has Helped Others

Viable Futures case studies -- that can be found at www.viablefuturescenter.org -- detail the variety of ways that the Viable Futures Toolkit and its point of view have shaped and advanced diverse community efforts. These applications demonstrate the flexibility and adaptability of the Toolkit to the specific circumstances and challenges of a wide range of communities. In particular, the VFT can be used as:

- A **primary guide** for a planning process, as represented by a case study from ***Portland, OR***, where the Housing Authority and Aging and Disability Services worked step by step with community-based agencies and residents from the New Columbia HOPE VI neighborhood, and showed how new ways of thinking and collaboration can be influential to transform a diverse collection of residents into a viable community.

- A **practical resource** for existing initiatives, as represented by case studies from the Jefferson Area Board for Aging (JABA) in ***Charlottesville, VA***. This Area Agency on Aging put a viable futures lens on its work to advance aging in community and to model what it means to become a "green" organization that, among other strategies, incorporates local foods into its meals programs.

■ An **idea organizer** for philanthropic investments and community planning, as represented by the case study of the *Arizona Community Foundation*. Now in its second cycle of funding for its Communities for All Ages initiatives, the Foundation has seen its dollars go farther and its funded communities grow closer through collaboration.

In short, the VFT can be used as creatively as your community needs it to be! Communities in over *20 states and counting* have found it to be a valued resource for shaping innovative solutions for the demands of this century, especially in these tough economic times.

Where the Training Can Be Helpful: A Checklist

VFT #1 and #2 enter the planning process through the lens of an aging community, but they provide a valuable approach for many other community pressures, challenges, and opportunities, as well. Which of these describe your community?

- ✓ Severely constrained fiscal climate
- ✓ Unfunded mandates from the federal government
- ✓ Declining environmental quality
- ✓ An abundance of silo-ed nonprofits and governmental units
- ✓ Skyrocketing health care costs
- ✓ An aging population
- ✓ Growing racial and ethnic diversity
- ✓ Increasing age segregation and isolation among generations
- ✓ Growing emphasis on regionalism and multi-jurisdictional planning
- ✓ A growing call for integrated transportation, land use, housing, and economic development plans

The VFT is intentional about providing opportunities to think in new ways. In times of fiscal constraint a tendency is to retrench and operate in silo mode. Yet, exactly the opposite approach is most beneficial – working in partnership for the greater good of the community. Lately a great deal of attention has focused on healthy, elder-friendly communities defined by Smart Growth principles -- development that improves the community, environment, economy, and public health. While the VFTs wholeheartedly endorse these principles, they encourage going at least a step further – using intentional thinking and planning to make communities better places for *all* ages. Communities are more likely to enjoy systemic, long-lasting changes if advocates for the aging (or other groups) bring key stakeholders from other populations into a planning process. By working in partnership with other organizations with a focus beyond any given silo, advocates will benefit from others' strengths and connections, be likely to fill gaps in services, bring in new resources for their work, and magnify results for all stakeholders.

In particular the Toolkits offer proven tips and concrete examples to:

- Approach solutions to any given issue with other issues in mind

- Promote coordinated planning across organizations, governmental units, and commissions

- Use available budgets in ways that can address multiple community issues

- Advance ways to diversify revenue sources and get the most for everyone out of a smaller pie of funds

- Create human, social, and political capital that strengthens communities

- Develop initiatives that help to protect and preserve the environment for present and future generations

The VFT resources are highly user-friendly, written with the following audiences in mind:

1. **Administrators, advocates, board members, planners and practitioners who are involved with local government, a regional planning organization, or a non-profit aging agency** who are on the front lines of planning and providing services for a society that is increasingly diverse, aging, and resource -constrained. They are doing this work either because of their agency mission or local demographic and fiscal imperatives.

2. **Staff and board members of Community Foundations and United Ways** who are on the front lines to fund community issues across a range of groups and needs.

Keep in mind that while the "door" the VFTs currently enter bring aging to the foreground, the training could also be meaningful for advocates and professionals whose primary focus is youth, family, and/or environmental concerns. All are among the groups with whom aging-oriented organizations will want to partner on the way to building a viable future for their communities – and vice versa. As a facilitator, this may mean that you will need to be particularly careful with language and acronyms that are specific to particular types of issues (e.g., reminding participants that AAAs are Area Agencies on Aging, not the automobile association!). By bringing out different views about the impact of the coming age wave or other emerging local issues, you will arrive at more sustainable solutions while building collaborative relationships for the long-term.

Three Basic Training Options ① ② ③

This Guide offers three main options for a Viable Futures training session:

1. A half-day session to introduce the Viable Futures point of view

2. A full-day session that both introduces the point of view and then applies it to a specific priority-setting or problem-solving need

3. Ideas for customization using various components from the options above
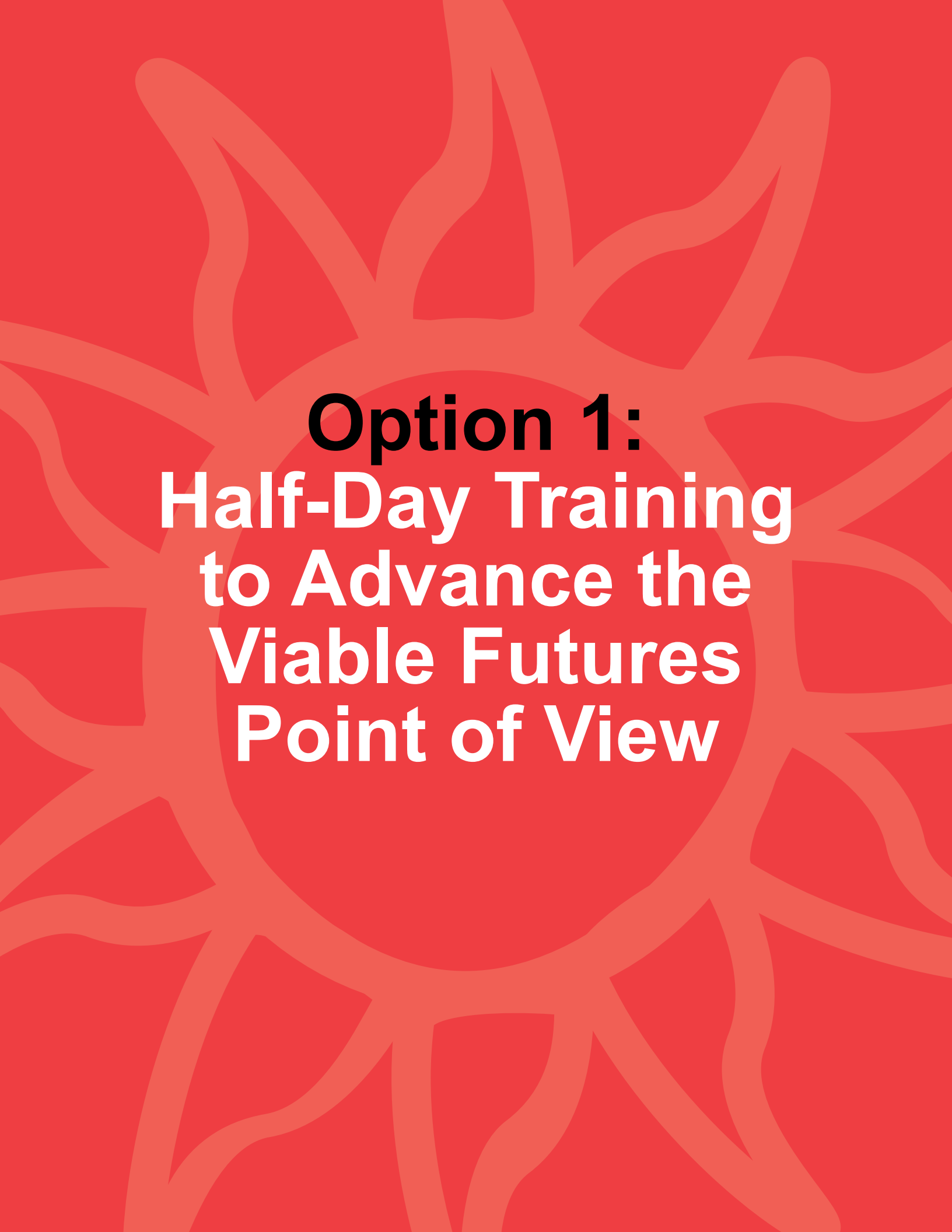
For the trainings we provide:

- The explicit purpose for the training

- Proposed desired results

- A sample agenda

- Content for the session, including talking points, case examples, lessons learned, and suggested powerpoint slides

- Group exercises to reinforce and apply basic points

- A sample training evaluation form

The Guide will assist you in preparing for and conducting the training. Tips to you as the facilitator are included throughout the document. If you have considerable experience with group facilitation, much of this introductory material will already be familiar. Glean what is most relevant to you and adapt it to your personal facilitation style. The trainings focus on the Toolkit concepts and approaches to community planning for a viable future. You will not be taking participants through each Toolkit section, but you will refer to Toolkit content throughout the training. We offer suggestions for how to do this in the most integrated fashion.

The half-, full-day, and customized trainings can be done either in-house -- within a single agency or organization -- or with participants from a range of government units and/or community organizations. Trainings are likely to be more effective if participants represent the range of interests and population groups generally needed for good community planning.

The training has a "hands-on" focus and is not intended for a large group of participants. It is more important to aim for participation from key community representatives rather than sheer numbers, particularly for the full-day training. Around 20 – 25 participants are most easily accommodated in the formats we offer. Keep in mind that there is no predetermined right or wrong way to approach work that employs the Viable Futures Toolkits and/or their point of view. Whatever works for your circumstances will be your right way. We hope this Guide gives you the information you need and sufficient confidence to choose your particular path in pursuit of a Viable Future.

Option 1:
Half-Day Training to Advance the Viable Futures Point of View

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Half-Day Training to Advance the Viable Futures Point of View

Training Purpose

The **half-day training** provides an overview of Viable Futures concepts and the point of view. It is intended to get conversation started about areas of potential common ground and beneficial collaboration in your community. It is useful as an introduction to tackling any of the issues on the Checklist on p. 4.

Desired Results

Knowledge Outcomes

Participants:

■ are introduced to the Viable Futures perspective and how it guides decision-makers around the country to strategies that simultaneously benefit all generations and the communities where they live.

■ learn how identifying common interests and working together with pooled resources can yield greater returns, both in the short-term and over time.

■ learn how they can use a "new math" where single investments can add up to much more than single outcomes and coordinated interventions can multiply results.

■ learn how they can turn the attention of an aging society toward promoting sound intergenerational and environmental practice.

■ understand how they can benefit from the use of the Viable Futures Toolkits in their communities.

Action Outcomes

Participants:

■ gain practical experience thinking beyond their traditional frames of reference -- identifying the types of organizations and issues around which they might find common ground and with whom they might partner.

■ generate creative ideas for planning and action in a time of changing demographics and fiscal constraints.

Sample Half-Day Agenda

9:00 – 9:15 a.m. **Welcome and Overview**

- Introduction of training team

- Overview of expected results *(see section above)*
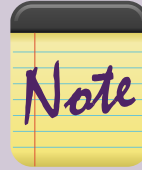
9:15 – 9:30 a.m. **Participant Introductions**

Participants introduce themselves. If the training is with a single agency, give the primary interest or focus of their work. Or if multiple groups are present (e.g., aging services, local government planning, community foundation grant-making, environmental concerns, housing development), participants should give the focus of their agency/organization. All participants should be asked to identify what they hope to get from the session.

Facilitator should record participant aspirations for the session on a flip chart. At the end of introductions, facilitator should indicate which of the participant aspirations are likely to be addressed in the session, which unaddressed aspirations are covered in Viable Futures materials, and which aspirations are not likely to be met in the introductory session.

9:30 – 10:00 a.m. **Walk-Through of Toolkit Purpose and Concepts**

(Materials for this segment are found in the next section.)

- *Optional: Show 15-minute video from VFT#1, which gives community examples of what a Viable Futures perspective looks like. If you use the video here, you will need to add 15 minutes to this segment and adjust others accordingly (making up the 15 minutes by reducing the Practical Experiences segment).*

- Why do we need to think in terms of a Viable Future?

- What is the Viable Futures approach to community planning?

10:00 – 10:15 a.m. **Break**

10:15 – 11:00 a.m. **Practical Experiences from Throughout the Country**

- Community examples of the "new math" in action
  Select examples from the case studies described in the next section.

- Lessons learned from around the nation
  See next section for content.

11:00 – 11:45 a.m.   Group Exercise to Demonstrate Out of the Box Thinking
Follow protocols found in the next section.

11:45 a.m. – Noon   Feedback and Wrap-Up
A sample written evaluation form is provided in the next section.

Content for the Session

1. Toolkit Purpose and Concepts

The trainer should provide a framework for the day so that the key components of the Viable Futures perspective inform the discussion. Below are some ideas for talking points. Powerpoint slides that you can use in the presentation of the framework are available as a separate download with this Guide.

Why do we need to think in terms of a Viable Future?

There are several community pressures, challenges, and opportunities to which the Viable Futures Toolkits respond. They include:

The changing landscape of available resources
- The most severely constrained fiscal climate since the Great Depression
- Unfunded mandates from the federal government to communities
- Climate changes that demand changes in the ways we live
- An over-growth of silo-ed nonprofits and governmental units whose missions are too limited for the complex issues we face today and whose separated resources cannot singularly respond to today's needs
- Skyrocketing health care costs which turn our attention to what it takes to promote healthy living on the preventive side of the equation

The changing face of communities
- An aging population where people live and work longer
- Growing racial and ethnic diversity and the need for stronger community bonds
- Increasing age segregation and isolation among generations, providing limited opportunity for cross-generational interaction
- Family members living further apart from one another, resulting in a decline of intergenerational support

Opportunities through a re-emerging recognition of interconnectedness

- Growing emphasis on regionalism and multi-jurisdictional planning
- Recognition of the greater value of public/private partnerships
- A growing call for metropolitan-area leaders to design and implement integrated transportation, land use, housing, and economic development plans

What is the Viable Futures Approach to Community Planning?

Note *The facilitator will want to spend some time explaining how the Viable Futures approach responds to the concerns and opportunities above, and how the approach is different from other planning processes. Be sure to acknowledge that participants are likely already to be involved in initiatives to make their communities more age- and environmentally-friendly or more collaborative, and that the Toolkits provide guidance on how to enhance those efforts. Present the following as an overview of the kinds of topics that participants can expect to engage in during the training.*

The VFT approach is intentional and *provides opportunities to think in new ways:*

- The approach advanced by the Viable Futures perspective is intentional about planning in ways that break down silos and envision issues and problems in their appropriate richness and interdependence with other issues. In times of tight fiscal constraints the tendency may be to retrench and operate in silo mode. Yet, exactly the opposite approach would be most beneficial – to work in partnership for the greater good of the community. The VFTs encourage you to think in new ways and to recognize that if you spend some time up front, you will gain over both the short and the long term in benefits for your organization and your community.

- Lately a great deal of attention has focused on healthy, elder-friendly communities defined by Smart Growth principles -- development that improves the community, environment, economy, and public health. While the VFTs wholeheartedly endorse these principles, they encourage going a step further -- intentional thinking and planning to make communities better places for *all* ages.

- Communities are more likely to enjoy systemic, long-lasting changes if key stakeholders across interest groups are brought into a planning process. By working in partnership with other organizations with a focus beyond your issue or specific constituency, you will benefit from others' strengths and connections, be likely to fill gaps in services, and bring in new resources for your work.

Elders tutoring at-risk children for educational success in new schools built according to green design (1+1=at least 11):

- Children with improved school grades

- Children with improved attitudes toward older people

- Older volunteers with improved mental health from tutoring

- Older adults with improved attitudes about children and youth

- Older adults more likely to vote for school bonds for improvements

- Teachers with more assistance

- Education funds for retired volunteer program

- All school inhabitants with better health through green design

- Lowered school utility costs

- School structures that can be used as science lessons

- Successful collaboration across schools, aging services, architects, school district

Community gardens in a previously vacant lot that involves neighbors of various ages, races and ethnic backgrounds (1=at least 11):

- Instills a sense of ownership and pride among residents

- Provides opportunities for intergenerational engagement and cross-cultural connection

- Produces nutritious food

- Reduces family food budgets

- Encourages self-reliance

- Creates income opportunities and economic development by enabling gardeners to sell their produce through a local farmer's market

- Conserves resources

- Reduces city heat from streets and parking lots

- Offers educational opportunities and vocational skills for youths

- Reduces crime

- Creates opportunity for recreation, exercise, therapy, and education

Wetland restoration program which involves a local government environmental quality department or extension agent, colleges/ universities, retiree mentors and elementary schools (1=at least 7):

- Provides opportunity for older adults to remain engaged in the community and impart their knowledge to youth

- Instills in youth the importance of protecting the environment

- Promotes meaningful interaction among the generations

- Capitalizes on the research skills of local universities

- Promotes positive view of the contributions of local government

- Protects the environment by preventing the negative impacts of wetland erosion

- Generates broad community support for similar initiatives

The Toolkits offer *tips and examples* on:

- Approaching solutions to aging issues with other generations in mind
- Promoting coordinated planning across the organizations, governmental units, and commissions doing the work
- Using available budgets for aging in ways that can also address other community issues
- Advancing ways to diversify revenue sources and getting the most for everyone out of a smaller pie of funds
- Creating human, social, and political capital that strengthens communities
- Developing initiatives that help to protect and preserve the environment for present and future generations.

The Toolkits focus on *areas of concern to ALL generations:*

- Lifelong learning and civic engagement
- Community and economic development
- Individual and family wellness
- Affordable quality housing
- Land use, transportation and natural resources

The VFT approach **uses a "new math"** to do more with less. Using the Toolkits will promote efficient use of scarce resources through an emphasis on economies of scope and synergy:

- **ECONOMIES OF SCOPE** -- 1 intervention solves multiple problems
- **SYNERGY** -- 1 intervention + 1 intervention = Much more than 2 outcomes

2.   Practical Experiences from Throughout the Country

These illustrative case examples show the VFT in action -- where the Viable Futures perspective has worked for local government, AAAs, private non-profits, housing authorities, and foundations. Select from the following case studies depending on the interests of participants. For example, if the sponsoring agency and/or the majority of participants are from aging organizations, use the JABA and/or Portland examples. If they are from local government, use the Portland and/or Reno examples. If they are from United Ways and/or foundations, use the foundation example. If housing and/or environmental sustainability are top concerns, use the JABA and/or Portland examples. You might even consider including representatives from these agencies highlighted here in your training – please contact us at info@viablefuturescenter.org to inquire.

While we have outlined key features of the case examples here, the facilitator will be best prepared by having read the specific case studies and news bulletins about them. These are available at www.viablefuturescenter.org. If you did not show the 15-minute video from VFT#1 at the beginning of the day, this section could be introduced with the video. It highlights the Charlottesville, Virginia, and state of Arizona examples below, as well as a housing example from Seattle, Washington.

New Columbia in Portland, OR
(AAA, Housing Authority, Non-Profits)

Bringing Hope to a HOPE VI Project: A bold, nationally-recognized project where the Housing Authority of Portland (HAP) transformed the ailing World War II Columbia Villa into an eco-friendly and mixed-use community campus with housing and amenities for families, children and seniors.

- An 82-acre site with 2,500 people from 22 countries, including 1,300+ children, who had moved there over the past two years
- Lower-income and higher-income families living side-by-side
- 850 housing units – 618 renters and 232 homeowners
- Senior housing; Impact Northwest senior services on-site
- Community activities center
- Award-winning Rosa Parks school
- Boys and Girls Club
- Education and workforce center

Sustainability Features
- Open space, parks, retained over half of mature trees
- Storm water management/bioswales
- LEED Gold for new elementary school (Leadership in Energy and Efficiency Design)
- Public transportation

Awards
- EPA Award for Overall Excellence in Smart Growth, 2007
- U.S. Dept. of Education Award for the Rosa Parks School as the best example of the growing trend of using schools as centers of community

Public/Private Partnership for Funding
- $153 million/public private partnership – HOPE VI, tax credits, tax exempt bonds, City of Portland, loans, foundation support, sale of lots

Presenting Challenges
- Question of how to build community amidst diversity
- Racial tensions and stigma of previously impoverished community
- Intense public scrutiny and some skepticism about the likely success of the project
- How to extend community beyond the New Columbia campus itself
- Aging groups wanted to improve services to New Columbia population and needed a roadmap for how to do this

The Approach: Community Planning Process

- Partnership of Housing Authority of Portland and Multnomah County Aging and Disability Services Division (Area Agency on Aging)
- Brought together community organizations to generate ideas and strategies for making the neighborhood a better place for everyone to live, in coordination with resident input
- Identified **common values**:
  - Single interventions should solve multiple problems
  - Synergy should result from chosen strategies
  - Interventions are considered with an eye to the future, not just the present
  - Older adults, youth and families are benefitted by the plans
  - Plans complement the green and clean standard

- Community partners and residents developed **priority areas**:
  - Intergenerational and multi-cultural interaction
  - Environmental awareness
  - Healthy food preparation and purchasing
  - Community safety

- **Selected Initiatives**
  - Reach and Teach Pocket Park Events
  - Kids Creating Harmony in Neighborhood Growth -- youth employment at senior-focused sites, environmental patrols
  - Adopt a Raingarden/Bioswale
  - Multi-cultural cooking classes
  - Community "nights-out"

Multiple Results from Single Intervention – The Example of New Columbia Pocket Parks

What they are

- Reach and Teach Pocket Parks bring local agencies to New Columbia to share resources and support for the community -- and to provide families the opportunity to get to know one another.
- Events are for people of all ages and include a variety of activities and educational events.
- Some of the agencies that have participated in the Pocket Parks are Portland Women's Crisis Line, Children's Relief Nursery, Center for Family Success, Positive Youth Development, Portland Bureau of Environmental Services, and YWCA Senior Services.

Results for the Community

- Positive culture change in terms of intergenerational and multi-racial sensitivity and involvement
- Children with improved attitudes toward older adults
- Older adults with improved attitudes about youth
- Increased comfort level with community safety
- Enhanced awareness of environmental stewardship
- Increased economic opportunity, with a strong focus on enhancing job skills of youth
- Connection of the community to the surrounding neighborhood

Results for Sponsoring Agencies and Partners

- Recognition that collaborative efforts support and enhance individual organizations' missions
- Less duplication of effort among/between partner organizations
- Cost effectiveness by combining efforts to meet community needs
- New funding allies and opportunities – win-win collaborations
- New advocacy partners
- Greater understanding of one another's services and strengths
- Greater visibility for individual organizations in the community by being part of the coalition

Sustaining Features:

- Senior and youth resident community builders
- Co-location of on-site programs
- Collaborative grant preparation
- Community Speaks Initiative - Opportunity for residents to share what they would like to see for New Columbia's future, including a survey and focus groups (Latino, African immigrants, seniors, youth, parents and homeowners). A report and an action plan guide their next steps.

Jefferson Area Board for Aging (JABA), Charlottesville, VA (AAA, Local Government, Regional Planning Organization)

How the Viable Futures Perspective is Transforming One Aging Organization :

- **Mission before VFT** . . . "To add dignity, security, independence, and fulfillment to the lives of older adults and their families."
- **And mission now** . . . "To promote, establish and preserve sustainable communities for healthy aging that benefit individuals and families of all ages."

Area Agency on Aging (AAA) Serving the Jefferson Planning District

- Mid-size city of Charlottesville, counties of Albemarle, Fluvanna, Greene, Louisa, & Nelson
- Area population around 200,000
- 80% White, 15% African American, 2% Asian American, 2% Latino, and 1% Bi/Multiracial
- By 2025, the population 65 and over will increase by 109%, outpacing the 41% increase in total population

Local Pressure Points

- Need for affordable housing
- Differences around land use vs. economic development
- Infrastructure issues – buildings, roads, water, solid waste
- Unfunded mandates
- Demographic changes – age, race

The VFT Point of View Within an AAA

- Age inclusive community centers
- Fund raising: public & private
- Greening operations that save money and reinforce mission
- Local food system development
- Improved pedestrian safety and mobility for all ages
- Multi-generational protection against heat waves
- Coalitions for universal design construction and service delivery
- Schools as community learning centers
- Location of senior housing integrated with rest of community
- Intergenerational advocacy

Proposed Incentives for Collaboration toward a Viable Future

- Challenge grants to non-profits and government departments
- Capital projects – diverse revenue sources, private partners
- Mixed use proffers
- Changing public policy to encourage intergenerational planning

Value of Viable Futures Approach to JABA and the Community

- Increased visibility and enhanced community image
- New partnerships for funding and advocacy
- Culture change in the community -- more inclusive programming and resource allocation
- Enhanced awareness of sustainable approaches that protect natural resources and support local farmers and businesses
- Internal organizational change: Board and staff benefit from deliberation and capacity-building around a point of view that emphasizes intergenerational initiatives and sustainability. This can positively influence an organization's mission statement, statement of purpose, strategic plan, fundraising approaches, publications, website, department goals and employee performance measures.

Reno and Washoe County, NV (Local Government, Non-Profits)

Enhancing Services and Maximizing Public Dollars in Nevada

■ Innovative ways to respond to the economic downturn and make public dollars go further by co-locating services at existing sites.

Maximizing Partnerships: Sun Valley Community

■ Senior Center in Sun Valley was moved to a county-owned building located within a community park. Building was being vacated by Washoe County Regional Parks because of budget cuts. The move saves the Department of Senior Services $20,000 per year in operational costs.

■ Variety of public and non-profit organizations have co-located and are offering new services at the community center. The County and City can more effectively meet the needs of underserved populations, and intergenerational and multi-cultural interaction has been enhanced.

■ Partner Agencies: County Sheriff's Office; Washoe School District's Family Resource Center; Head Start's early childhood education program; Northern Nevada Food Bank.

Meeting the Needs of the Hispanic Community

■ The Neil Road Recreation Center is fulfilling the long term vision of the City and County to reach the Hispanic community in South Reno. By partnering, the City and the County were able to make optimal use of an existing site – and provide resources to underserved families, youth and seniors.

■ Seniors living in this area will now have local access to nutritional services, thanks to the joint effort. The center is a hub of activity and a central place for families and youth to find resources. A variety of community agencies are now located at the recreation center, including Hispanic Services of Nevada, Juvenile Services, St. Mary's Health Clinic, and a police sub-station.

Arizona Community Foundation (ACF)
Intentional Intergenerational Strategies

■ **Arizona Communities for All Ages (CFAA) Initiative** -- In collaboration with the Temple University Intergenerational Center and other national and community leaders, ACF conducted a community planning process. Community Forums conducted in three regions of the state raised awareness about the value of the CFAA approach to community building and enabled local community leaders to talk about intergenerational efforts already in place.

Implementation grants of $50,000 per year were awarded to communities through a competitive process.
■ **Process for Grantees:** In each site, diverse groups of community leaders, residents and organizations came together to form a CFAA team. Although they were given program guidelines, communities were empowered to follow different approaches and to build on existing local assets to address community needs. Across their diversity, all sites created collaborations among key stakeholders and created opportunities for generations to work together to address a community issue. For example:

■ **Ajo in rural southern Arizona:**
- Once a thriving mining town, Ajo found itself facing an exodus of much of its population when the mine was closed and opportunity in Ajo all but dried up.
- Spearheaded by the International Sonoran Desert Alliance, the Ajo team created a vibrant multicultural and multigenerational program at the Curley School campus, an abandoned elementary school, as the permanent institutional anchor and hub for intergenerational activity.
- Opportunities specifically focused on the arts, cultural production and employment skills. Generations and cultures come together through a variety of programs including GED, English as a Second Language citizenship classes, work mentoring, youth leadership training, creative classes that bridge generations, and artisan education.

■ **Golden Gate in Urban Phoenix**
- The Golden Gate neighborhood is characterized by new immigrant families, many of whom are Hispanic.
- Led by Arizona Children's Association, this project transformed the existing Golden Gate Community Center into one that empowered community members of all ages to create safe, healthy environments across generations and cultures.
- The Golden Gate team integrated intergenerational strategies into existing programs, ranging from Head Start to computer labs, improving and expanding on what already was in place. As a result, Golden Gate activities connect families, promote healthy lifestyles, provide leisure activities and art experiences, and create stronger connections in the community.

Lessons Learned from Across the Nation

Display the lessons below for the group to see. This material functions to provide a wrap-up to the first part of the session, summarizing the key points of the case studies and providing a lead-in to the group exercise. The facilitator will be best prepared by having read the Lessons Learned publication, which is available at www.viablefuturescenter.org.

- It takes one organization to get things started, but more to realize a vision.
- You already have allies to enlist; capitalize on existing relationships.
- Start out by expanding your current scope of activities.
- Plenty of common ground exists – once you intentionally look for it.
- The Viable Futures approach opens up resources for common-ground issues.
- Multi-generational families are a key building block for a broader vision.
- Having guiding values and an explicit framework for action keeps conflicts at bay.
- Changing traditional policy and practice leads to mission accomplishment and sustainability.
- Change must be nurtured internally in organizations – not just externally to the community.
- Proof of the concept is in the work itself, but you must intentionally measure it.
- Celebrating success along the way sets the stage for even greater success.

3. Group Exercise to Demonstrate Out of the Box Thinking

This is the point in the agenda where participants have a chance to apply what they have heard and discussed. The purpose of this exercise is to get participants thinking about new ways they can collaborate – to stretch a bit in considering the types of partnerships that would be beneficial to the community and the kinds of issues where there could be common ground.

There are 2 options presented for this exercise. You could select one of the options provided, or you can come up with your own exercise based upon the general idea. Whatever you decide, you'll need to walk the participants through instructions for the exercise.

For Either Option:

FIRST, Create two "grab bags" using the chart below to help. One grab bag is full of "Partners." Each paper in this grab bag will have one of the groups on it from the list of stakeholders below (or ones that you select.) The other grab bag is full of "Opportunities." Each paper in this grab bag will have one of the items from below (or ones that you design.) You can adapt items on the list of "Potential Community Partners" and "Areas of Opportunity" for your specific training purposes. For example, if you are aware of pressing issues in the community, you might want to select Opportunities that address these. If the items on the following list don't meet your needs, refer to the Community Checklist in VFT #1 and the ideas for potential projects in each section of VFT #2 for additional ideas. NEXT, break into small groups of no more than 6-8 participants per group.

GRAB BAG 1:
Potential Community Partners

City and County Government

Regional Planning Council and Metropolitan Organizations

Foundations and Funders (Community Foundation, United Way)

Local Business Chamber of Commerce

Area Agencies on Aging, Senior Centers, Adult Day Care

Senior Citizen Volunteer Organizations (AARP, RSVP)

Children and Youth Organizations

Local Schools

Education Groups (School Board, PTA, Literacy Councils)

Family Service Organizations

Community Development Coalitions

Environmental Groups/Green Builders (Local "Smart Growth")

Neighborhood Associations

Housing Advocacy Organizations (Housing Alliance, Habitat for Humanity)

Transportation Providers and Organizations

Hospitals, Community Health Clinics (Home Health)

Disability/Special Needs Groups (Heart and Lung Associations)

Farmers and/or local food distributors

Extension Service

Civic Organizations (Rotary, Lions Club, Junior League)

Parks & Recreation Departments

Arts and Cultural Groups

Legal Aid Organizations

Public Safety Groups (police department, fire department, EMS)

Culturally Specific Advocacy or Service Organizations

Faith-Based Organizations

Workforce Development Specialists

Local Media

GRAB BAG 2:
Areas of Opportunity for Building Partnerships

Multi-generational community centers

Intergenerational after school programs

Mentoring vulnerable children

Encouraging healthy lifestyles

Local foods initiatives

Environmental education programs

Water conservation initiatives

Reuse and recycle programs

Creating walkable communities

Access to affordable health care

Access to safe and affordable housing

Housing that is use-flexible for people with special needs

Support for caregiving families

Workplace programs that support family caregivers

Neighborhood safety

Workforce development initiatives

Option #1: *Have participants draw one paper from each bag. The task of each small group participant is to come up with an idea of how they, in their <u>actual</u> role (e.g., housing developer, aging services, youth advocate) could: (a) partner with the group whose name they've drawn, and (b) contribute to the issue named on the paper they've drawn.* ***Ask them to talk about these questions within their small group:***

- What areas of common interest or shared/overlapping goals do you have with the community partner you've drawn? *(from Grab Bag #1)*

- What is the vested interest of your organization in this issue? *(from Grab Bag #2)*

- *AND, encourage them to be really creative:* How would you combine the grab bag ideas? In other words, how would you in your current role partner with the partner you drew around the issue you drew?

Each participant in turn shares the items they drew from the grab bag and answers these questions within their group. Group members can help if anyone is stumped by the items they drew. Toward the end of the session, the facilitator asks participants to report out on what they take away from the exercise. ***Ask:***

- Did the exercise raise your awareness of how you might approach new partners and issues in your community? If so, how?

- What were some of the challenges in the exercise – and how did your group address them?

Option #2: *First, each person in the small group will choose from the "partners" grab bag and take on the role of a person in that designated organization/group/service area. Each group will go around the table and have every person share their partner role.* ***Ask the group to discuss the common interests among the various partners at the table:***

- How can (or do) you in your assigned role work with the other partners represented?

Then, someone will draw an issue for the group out of the "issue" grab bag. Each group will come up with ways that each partner could contribute to bringing that issue to life in their community. Someone records all the ideas on a worksheet. ***Then ask:***

- Where did you identify possible new areas for collaboration?

- Did you come across a partner role that couldn't be fit into the issue? Why not?

- Did the exercise raise your awareness about the potential for new collaborations in your community? If so, how?

Toward the end of the session, the facilitator asks participants to report out on what they learned or take away from the exercise.

4. Feedback and Wrap-Up:

Ask participants:

- Did you have any "ah-hah" moments this morning?

- How can you use this point of view and/or the Toolkit(s) in your work?

Remind them:

However the Toolkits are used or the point of view is employed, there is general agreement that it can serve these purposes:

- generate excitement and provide direction for the opportunity to step back from every day work and think in new ways

- speak to a broad range of stakeholders

- offer the rationale and substantive "glue" for people to work together

- help to balance a big vision with specific work to get there

- bring the perspective of aging as a lifespan phenomenon and the realization that generations have a great deal of issues in common

- break down a "silo-ed" approach to understanding issues and making decisions for change

All Viable Futures resources are available at www.viablefuturescenter.org.

5. Evaluation Form

Ask participants to complete a written evaluation form. We have included one here that you can use as is or adapt for your purposes. If you are using this component of training as part of a full-day session, we provide a separate evaluation form for the full-day option later.

Please take a few minutes to answer the following questions. Your response will help us to enhance future trainings. When you have completed the evaluation, please return it to staff.

Site and Date: _____

Please rate each session:

Topics	Excellent				Poor
1. Walk-through of Toolkit purpose and concepts	5	4	3	2	1
2. Practical experiences from throughout the country	5	4	3	2	1
3. Group exercise	5	4	3	2	1

Please rate the effectives of the training in expanding your knowledge in the following areas:

4. Learning to think beyond your traditional frame of reference	5	4	3	2	1
5. Identifying the types of organizations and issues where you might have common ground	5	4	3	2	1
6. Learning how to promote sound intergenerational and environmental practices	5	4	3	2	1
7. Generating ideas for planning and action in times of changing demographics and fiscal constraints	5	4	3	2	1
8. Understanding how your community could benefit from using the Toolkits	5	4	3	2	1

Please rate the Materials:

Topics	Excellent				Poor
Handouts	5	4	3	2	1
Video (if used)	5	4	3	2	1
Overall Training Rating:	5	4	3	2	1

ADDITIONAL FEEDBACK ABOUT THE TRAINING

If you rated any item 3 or below, please let us know why:_____

_____

_____

Which feature of the session was most helpful, and why? _____

_____

_____

Was there a particular issue/topic that you thought should have been addressed but wasn't? Please explain:

_____

_____

_____

Overall, did the training meet your expectations? Explain: _____

_____

_____
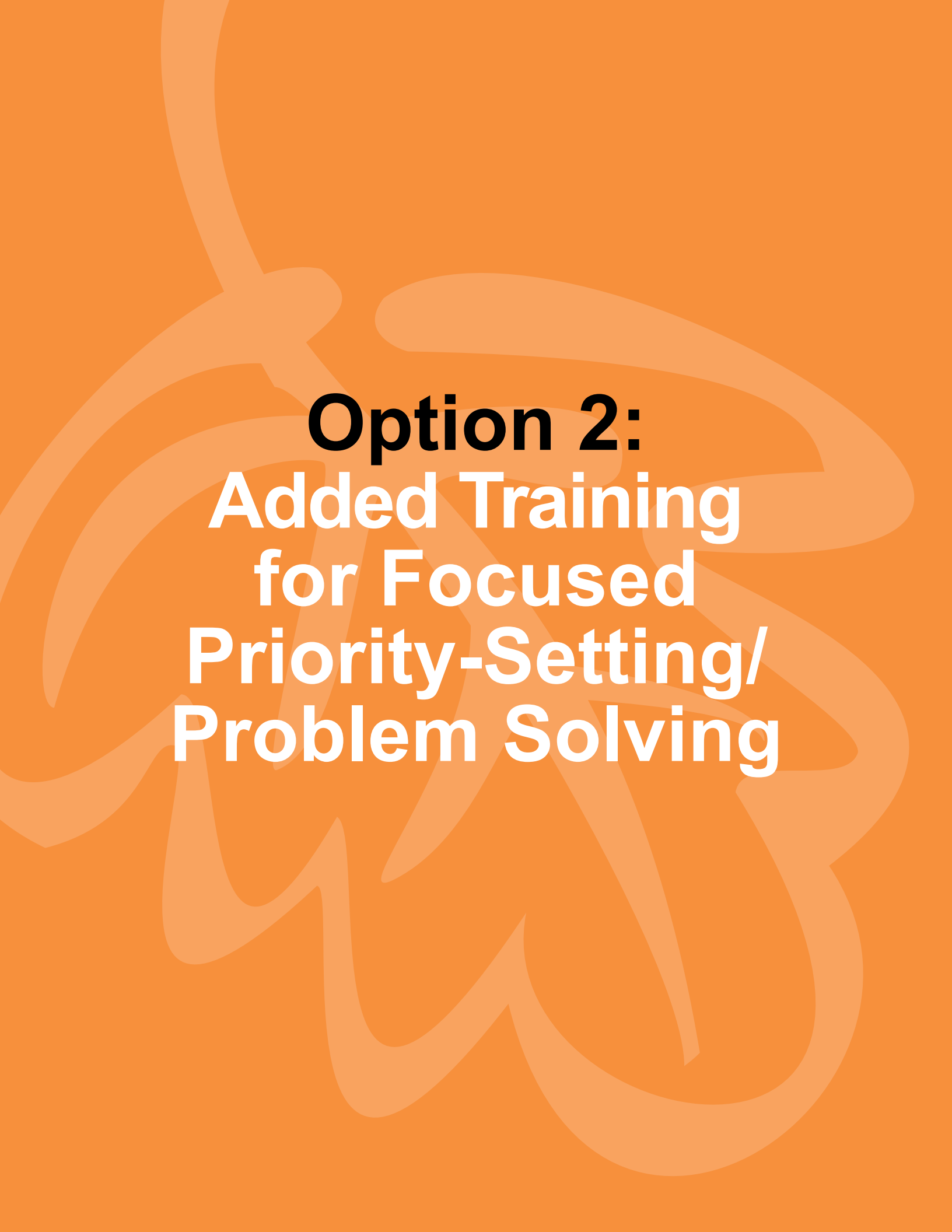
Please offer any other comments or suggestions that you believe would be helpful for future trainings.

_____

_____

THANK YOU!

Option 2:
Added Training for Focused Priority-Setting/ Problem Solving

Option 2:
Added Training for Focused Priority-Setting/Problem Solving

This component is intended to follow Option 1. It can be combined with it to become a full-day session, or it can be offered on a separate day as another half-day convening.

Training Purpose

The full-day training builds upon the opening session by providing opportunities for practical local application of Toolkit concepts. It walks participants through the initial stages of a community planning, priority-setting, or problem-solving process.

Desired Results

Knowledge Outcomes

Participants learn:

- the key steps in an effective community planning process.

- strategies for identifying priority issues in their community and approaches to build upon any current efforts.

- how to identify key partners and the roles that each could play in a collaborative process.

- approaches to overcome obstacles and challenges posed by a collaborative approach.

Action Outcomes

Participants:

- identify pressing issues in their communities that impact diverse members of the population.

- leave the session with next steps to address a key issue in their community.

Sample Agenda

1:00 – 1:15 p.m. **Overview of Afternoon Session**

- Overview of expected results *(shown above)*
- Steps for effective community planning *(content provided in next section)*

1:15 – 2:15 p.m. **Getting to Common Ground**

- A priority-setting exercise *(see next section)*

2:15 -- 2:45 p.m. **Identifying Current Efforts**

- What is currently happening to address this issue?
- Who is involved?

2:45 – 4:15 p.m. **Beginning the Planning Process**

- What else needs to be done to address this issue?
- The new math: How can multiple outcomes be realized through this approach?
  Who in the community will benefit and how?
- Collaboration: What are the potential roles of those at the table – what expertise can you offer?
- Collaboration: Which additional individuals/organizations need to be brought to the table?
- How will you approach them and what are the incentives for them to participate?
- What are the biggest obstacles to this collaborative approach?
- What are some initial ideas for addressing these challenges?

4:15 – 4:30 p.m. **Break**

4:30 – 5:00 p.m. **Identifying Next Steps and Wrapping Up**

- What needs to happen next?
- What will it take for you and your agency to remain involved?
- Who is going to take the lead from this point on?
- What roles/assignments are people willing to take on?
- Development of a general timeframe

Content for the Session

Note *This session will work best if participants are selected in advance and consist of stakeholders in the community who represent diverse interests – such as youth, aging and racially diverse populations, representatives of local government, and community foundations. Much can be developed prior to the training by reviewing the participant list – and the experience will be enhanced by doing a quick e-mail survey about current pressing issues in the community.*

Depending on the size of the group, you can work with the entire group, or break into smaller groups (of no more than 6-8 people). Organize groups so that they have a mix of key constituencies (e.g. don't put all of the aging-oriented folks in one group) This session is basically an adaptation of the "Grab-Bag" exercise from Option 1, but with specific applications to concrete identified local community issues.

1. Steps for Effective Community Planning

Provide an overview of these steps for an effective community planning process to set the context for the afternoon session.

Get Started: Someone needs to get the process rolling. Who in the community has the leadership/vision to "make the case" for collaborative planning?

Enlist Allies: You don't need to start from scratch; build upon current partnerships and initiatives.

Identify Common Ground: Find those guiding values and issues of common concern to community members of all ages.

Identify Potential Partners: Be creative in identifying potential partners who have a stake in the community and represent diverse interests -- youth, aging and racially diverse populations, for example.

Practice Inclusion: Consult with those who will be affected by collaborative efforts and those you want to attract.

Assign Roles: Utilize each individual's and organization's strengths and assets.

Create Incentives: Build in reasons for people to remain at the table.

Craft Effective Messages – Make sure they resonate with your target audience.

2. Getting to Common Ground

Explain the following "Common Ground" exercise to the group.

The Exercise:

➡ Each person writes down 3 current pressing issues in the community
(e.g. lack of low-income housing; shortage of in-home workers; limited access to fresh food)

➡ Facilitator collects and organizes these and writes them up on newsprint
(allowing consolidation as the group suggests or agrees to)

➡ Participants select top priorities through placement of color-coded dots on newsprint *(e.g. blue for top priority = 3 points, red for second priority = 2 points; yellow for third priority = 1 point)*

➡ Facilitator adds up dots for each item and announces the top-ranking issue that will be addressed in the training

Note *After all participants submit their issues, the facilitator will need to spend time organizing them. Chances are there is going to be quite a bit of overlap. You will then need to write them on large pieces of paper to be placed on walls, so that participants can clearly see all of the choices. It would be a good idea to solicit a couple of volunteers to help you with this to speed the process. You could also get a jump start by surveying people in advance and preparing newsprint before the training with the issues to be prioritized.*

The facilitator's collating and recording process will provide a natural break and an opportunity for mingling. Participants should be given a precise time to reconvene for the rest of the exercise. Once reconvened, ask them to place their assigned dots (you can choose to give each person 1 of each color or more) by the respective items that align with their priorities. Once placed, you can assign participants to help you do the math to determine the top-ranking issue -- generally the one with the most overall points, but decide before hand among options (e.g., could also choose the one with the most blue dots or the one with the most overall dots, regardless of color).

One way to model economies of scope would be to ask if some of the top-ranking issues could be combined, and then the group would seek strategies that address them simultaneously!

3. Identifying Current Efforts

The facilitator will need to be very flexible in leading this section and the following one, and take into account the current level of community involvement with the issue. It's important to recognize that most communities are not starting from scratch – and acknowledge the community's progress to date.

The Discussion:

The last section of this Guide offers Ground Rules for Discussion. You may want to review these before this segment of the training. Ask participants:

➡ What is currently happening in the community to address this issue and who is involved? If nothing meaningful is currently happening to address this issue, go to the next section.

➡ How effective are current efforts?

4. Beginning the Planning Process:

The Discussion:

➡ What else needs to be done to address this issue? What should be done first?
Try to get the group to narrow the focus to a particular initiative.

➡ The new math: How can multiple outcomes be realized through this approach just identified– who in the community will benefit and how?

➡ Collaboration: What are the potential roles of those already at the table – what expertise can they offer? *E.g. act as primary convener, offer staff support, provide PR expertise, champion the cause to elected officials, provide research assistance or data, contribute grant writing, be a funder*

➡ Collaboration: Which additional individuals/organizations need to be brought to the table? *Refer to the coalition-building sections of the Toolkits for extensive lists*

➡ How will you approach them and what are the incentives for them to participate? *Refer to Toolkit sections on messaging*

➡ What are the biggest challenges or obstacles to this collaborative approach? *E.g. getting board support; convincing staff that collaboration is worthwhile, funding*

➡ What are some initial ideas for addressing these challenges?

5. Identifying Next Steps/Wrap-Up:

> **The Discussion:**
>
> ➡ What needs to happen next?
>
> ➡ What will it take for you and your agency to remain involved?
>
> ➡ Who is going to take the lead from this point on?
>
> ➡ What roles/assignments are people willing to take on?
>
> ➡ What time frame is realistic for next steps

6. Evaluation Form

Ask participants to complete a written evaluation form. We have included one here that you can use as is or adapt for your purposes.

Viable Futures Toolkit Training
Evaluation – Full-Day Session

Please take a few minutes to answer the following questions. Your response will help us to enhance future trainings. When you have completed the evaluation, please return it to staff.

Site and Date: _____

Please rate each session:

Topics (Morning Session)	Excellent				Poor
1. Walk-through of Toolkit purpose and concepts	5	4	3	2	1
2. Practical experiences from throughout the country	5	4	3	2	1
3. Group exercise	5	4	3	2	1

Topics (Afternoon Session)	Excellent				Poor
4. Getting to common ground exercise	5	4	3	2	1
5. Identifying current efforts in your community	5	4	3	2	1
6. Beginning the planning process	5	4	3	2	1
7. Identifying next steps	5	4	3	2	1

Please rate the effectives of the training in expanding your knowledge in the following areas:

8. Learning to think beyond your traditional frame of reference	5	4	3	2	1
9. Learning how to promote sound intergenerational and environmental practices	5	4	3	2	1

10. Generating ideas for planning and action in times of changing demographics and fiscal constraints	5	4	3	2	1
11. Understanding how your community could benefit from using the Toolkits	5	4	3	2	1
12. Learning the key steps in an effective community planning process	5	4	3	2	1
13. Identifying and prioritizing common ground issues in your community	5	4	3	2	1
14. Identifying key partners and roles that each could play	5	4	3	2	1
15. Overcoming obstacles to a collaborative process	5	4	3	2	1

Please rate the Materials:

Topics	Excellent				Poor
Handouts	5	4	3	2	1
Video (if used)	5	4	3	2	1
Overall Training Rating:	5	4	3	2	1

ADDITIONAL FEEDBACK ABOUT THE TRAINING

If you rated any item 3 or below, please let us know why:_____

_____

_____

Which feature of the session was most helpful, and why? _____

_____

_____

Was there a particular issue/topic that you thought should have been addressed but wasn't? Please explain:

_____

_____

_____

Overall, did the training meet your expectations? Explain: _____

_____

_____

Please offer any other comments or suggestions that you believe would be helpful for future trainings.

_____

_____

_____

_____

THANK YOU!

Option 3:
Customizing the Basic Components to Your Needs

Training Purposes and Desired Results

If your specific needs were not fully addressed in the Options for training above, either or both of these formats can be tailored and adjusted to your specific needs. Further, if you choose to conduct an all-day session by combining the components in Option 1 and Option 2, you may also want to use some of the lunch hour to acquaint participants further with the Viable Futures Toolkit materials. In short, you are in the best position to know what you need from the materials and what your aspirations are for participants. We encourage you to use our suggestions as guideposts and be as creative as you desire. This Guide simply shares materials that have worked for us.

Just as there is no single right way to use the Toolkits, there is also no single right way to conduct a VFT training. It all depends on what purpose you wish to achieve and what results you and the participants seek from the session. Our only bottom line is that the more interactive the session is and the more you draw from the experience and expertise of participants, the greater are the chances that it will be a rich and rewarding engagement. You will need to determine the optimal balance between the content needing to be covered and the time participants are able to commit. For as much as participants may want to move quickly to on-the-ground issues in your community, we encourage you to give sufficient time to building a shared understanding of the VFT point of view. Without that, it may be too easy for participants to default to conversations built on prevailing approaches whose results have not yielded the returns this moment in time needs.

In the sections below, we offer additional components that you may want to build into your customized training agenda. The first is a hands-on exercise that is especially useful for enabling Toolkit users to map community-relevant questions to specific resources in the Viable Futures Toolkits. It can also be used to prepare others to train with the VFT materials. The second summarizes another available video that demonstrates the VFT point of view as applied to the use of local foods by human service agencies and other institutional meal providers.

BONUS: Session for Training Trainers

As already noted, this is a hands-on exercise that is especially useful for enabling Toolkit users to map community-relevant questions to specific resources in the Viable Futures Toolkits. It can also be used to prepare others to train with the VFT materials. For this exercise, participants will need to have copies of the Toolkit(s) available as references. Expect to use about 15 minutes for any of the items below, so gauge the number of examples you choose to the time you have available comfortably to cover them. These items have no "right" answers per se (although some points will be more "on point" than others!). Be sure you provide sufficient time for participants to have a full discussion and are able to clarify or resolve differing "answers."

Facilitated Discussion Questions

1 A Town Manager and the President of the local university, which is the biggest employer in the community, have decided to work together to devise a plan for optimal utilization of 4 acres that the university owns at the edge of town. They come to you for help in thinking about this responsibility so that the plan contributes to building a community that is a good place for all ages. How can the Viable Futures approach help with their request?

2 You are approached for advice by the key staff person of the state Task Force established by the Governor. The charge for the Task Force is to build an agenda for both the public and the private sector that promotes the state as a desirable place to live. The niche the state wants to sell is that it is the healthiest state in the country. How can the Viable Futures approach help you assist the staffer?

3 A child advocacy group in a local community is alarmed by the growing number of retirees moving into the area. They have started to express concerns that older residents will trump children as beneficiaries of local funds and political will. How can the Viable Futures approach help allay these concerns and assist aging and child/youth organizations to find some common ground?

4 An aging organization is interested in using local foods in its nutrition programs, and recognizes that it needs to have the involvement of the broader community for any initiatives to succeed. How can the Viable Futures approach help them get started and engage potential partners?

BONUS: Local Foods Video

The Jefferson Area Board for Aging in Charlottesville, VA, is a leader in the use of local foods for its institutional meal programs – and has used the effort to address multiple community issues simultaneously. The video illustrates the "new math" promoted by the Viable Futures point of view and Toolkits. You might consider showing the video:

■ *In training Option 1 as you cover the points about economies of scope and synergy*

■ *In training Option 2 at the beginning to illustrate the kind of collaboration a Viable Futures approach fosters*

■ *Over lunch during a full-day session that uses both Option 1 and Option 2*

■ *To groups interested specifically in the use of local foods for institutional meal programs*

The video can be accessed at: http://www.viablefuturescenter.org/VFT_NewMathDVD/VFT.html

Training Aides

Preparing for the Training: a To-Do List

Prior to the Session

TThe training will likely be sponsored by a community organization or a partnership of organizations. You will need to delineate your roles – and that of the host organization(s) – from the following checklist.

Identify training participants who represent a wide range of important constituencies to get a good mix of community voices. Be sure to include individuals and organizations with which the host organizations have established relationships or are seeking to build relationships.

Include stakeholders -- individuals, groups, or organizations that:

- are affected by an issue or situation and thus have legitimacy for seeking action.

- have an interest in either making change or keeping the status quo

- have knowledge about an issue or project and may be able to do something about a problem

- can give visibility and credibility to the work as high-profile champions

- could be instrumental in securing funding

On page 23 there is list of stakeholders to consider that are found in most communities. You will likely think of others.

Select a meeting site that is centrally located, easily accessible, comfortable for all cultural groups, and has ample space for setting up tables in a configuration that encourages conversation (e.g. hollow center if group is small and the training is only a half-day – round tables of 8 each for larger groups and for a full-day training.)

Develop an invitation that includes meeting, time, location, who is sponsoring the training, a brief description of the training and expected outcomes. Specify a response date, and be sure to follow-through with e-mail and phone calls.

✅ **Prepare in advance for training day logistics** – arrange for audio visual functions; name tags; handouts (agenda, copy of expected outcomes, and other content as appropriate); supplies for group exercises (paper and pens; color dots for the full-day agenda; newsprint and markers) and refreshments. Determine how many copies of the Viable Futures Toolkit(s) need to be available for reference.

✅ **Arrange for lunch** if the training will have a working lunch or is a full-day event. Have a variety of box lunches available – or provide a list of nearby restaurants if participants are on their own. Try to use vendors who prepare locally grown foods, and be sure to have options for vegetarians and those with other food preferences or restrictions.

The Day of the Training

Create a comfortable environment that is conducive to open and productive discussion:

■ Have agenda and handouts available

■ Provide nametags (have extras on hand)

■ Provide refreshments

■ Pay attention to room temperature

■ Announce housekeeping items: location of restrooms; request that cell phones be turned off

■ Allow plenty of breaks

■ Find a volunteer from the group to take notes

■ Post ground rules for discussion (see below)

Ground Rules for Discussion

Ground rules promote effective team behaviors and are essential to keep a group on task and to promote a respectful meeting environment. All participants should agree on the ground rules at the beginning. The rules should be posted during the training to serve as a constant reminder of how the group has agreed to work. If someone violates the ground rules, it is the role of the facilitator to draw attention to the behavior courteously and remind the person of the rules. Ground rules are best if they are simple, direct, and enforceable.

Here are some basic rules. Feel free to adapt these for you own use and to ask participants what they would like to add:

- All are **equal participants** – including the sponsoring agency representatives.

- **Participate** to the fullest of your ability and comfort level -- community growth depends on the inclusion of every voice.

- **Listen to and respect** others when they are talking – only one person should speak at a time with no side-bar conversations.

- Instead of invalidating somebody else's story with your own spin on their experience, **share your own story and experience.**

- Do not be afraid to **respectfully challenge** one another by asking questions, but refrain from personal attacks -- focus on ideas.

- The facilitator reserves the right to move on to another topic if the discussion becomes bogged-down.

What would you and the participants add to these?

Tips for Trouble-Shooting

Discussions almost inevitably contain the possibility for detours. Here are some ideas for anticipating and managing them:

- Model the ground rules in your own participation.

- Enforce the ground rules early and often. If you do not set a tone of strict adherence to the items early in the process, it may become impossible to enforce them later.

- Listen carefully to what is said by participants. If necessary, rephrase a reader's comments or question to be sure you and others understand what was meant. This is an especially valuable technique when dealing with a verbose participant.

- Handle interruptions by saying "Hold that thought. We'll want to hear it again once Joan has finished."

- Address conversation monopolizers by saying, "That's an interesting point you just made. Did anyone else get the same impression or a different one?" Or, "You've made some interesting points. Let's hear from another group member."

- Allow everyone the chance to contribute to the discussion. Engage silent participants by posing open-ended questions directly. Try asking, "What do you think about what Bob said?" Recognize that participants may vary in their comfort with public participation, and find ways to make it easy.

- Be conscious of body language and nonverbal responses -- they can be as disrespectful as words.

(Includes concepts from: EdChange: http://www.edchange.org/multicultural/index.html)

Powerpoint Slide Bank

In a separate download we provide some basic slides that we have used successfully. Feel free to add to them, revise them, remix them, or otherwise adapt them to your specific training session. We simply ask that you credit the Viable Futures Center (www.viablefuturescenter.org) as the source.

Contact Us

If you would like more information about the products and services of the Viable Futures Center, or if you have questions related to the Training Guide, please contact:

Paula Dressel, JustPartners, Inc., Baltimore, MD
pdressel@justpartners.org ■ 410-244-0667, x 102

Additional Resources

All of the following resources are available at www.viablefuturescenter.org:

Viable Futures Toolkit #1: Sustainable Communities for All Ages
Viable Futures Toolkit #2: Community Planning for Boomers
Charlottesville Case Study #1: Creating a Viable Future
Charlottesville Case Study #2: From Gray to Green:
    One Aging Organization's Journey Toward Sustainability
Charlottesville Case Study #3: Feeding a Crowd With Local Foods
Companion DVD to Case Study #3: Practical "Garden to Table" Guidance for Meal Service Providers
Arizona Case Study: A Learning Laboratory for Bringing Generations Together
Portland Case Study: The Hope in HOPE VI
Lessons Learned Using the Viable Futures Toolkit

JustPartners, Inc., 1701 St. Paul St., Baltimore, MD 21202