



Community Conversation Facilitator Guide

This guide provides an update of the timing and sequence of facilitating the **AmericaSpeaks: Our Budget, Our Economy** Community Conversation on Saturday, June 26, 11:30 a.m. EDT.

It is intended to accompany the Community Conversation Host Guide and Worksheets.

Updated June 23, 2010

A Note about Voting and Recording Results

Participants at your Community Conversation site will be going through the same process as people across the country. The only major difference will be that participants in some other sites will have handheld polling keypads and your participants will not.

Periodically, over the course of the program, the Lead Facilitator in Philadelphia will ask multiple choice questions for participants to respond to. When these polling questions are asked, participants in Philadelphia will use electronic polling keypads to respond. Soon after the questions are asked, we will see the results of the polling questions on the screens.

Since you will not have polling keypads, your meeting site will use worksheets to record your answers to the polling questions.

For each polling question, your participants will have a worksheet. When we ask a polling question, instruct participants at your site to record their answers on paper. Later on, you can collect the worksheets and submit the polling answers over the Internet.

Each polling question will take 1-2 minutes to complete, so for each question you may ask your participants to share their answers with the rest of the group and ask people to talk about why they voted the way they voted.

For example, a polling question could be asked like this one:

How important is it for our nation to take steps to address our fiscal challenges?

- Very important
- Important
- Somewhat important
- Not important at all

Your participants will fill out their votes on their worksheet. Later on, you'll be able to collect worksheets, tabulate the results and submit the results online on the Data Entry Screen.

FACILITATOR ROLES AND SKILLS

- **Host Your Table:** Do everything you can to be a good host – smile, be friendly, make participants feel comfortable, and help them with anything they need. If the energy of the group is low or unfocused, take whatever action is needed to get the group back on track.
- **Support High Quality:** Help participants have a good and productive discussion. Make sure they understand the task and the information presented, and that everybody is fully participating.
 - Establish ground rules and get participants engaged in the conversation
 - Maintain focus on discussion questions within the program sequence
 - Ensure participants are/remain engaged and can safely share their views
 - Encourage balanced participation and depth of ideas
 - Capture key points on laptop and submit ideas consistently
- **Staying Neutral:** Your role does NOT include sharing your own opinion on the topics covered in the Town Meeting. Do not express any political opinions or views. Keep in mind that participants come from across the political spectrum and need to feel safe to express their points of view and not feel that they are being pushed or manipulated by the process.

- **Maintain Focus:** Lengthy anecdotes can quickly sidetrack table discussions. When this occurs, try to gently coax the participant to finish up their anecdote. You may also point to the appropriate visual cue on the table tent.
- **Taking Notes:** To the extent possible, jot down key words/notes from the table discussions and tasks. This will help you keep participants on task and ensure laptop recorders record the conversation accurately.

FACILITATION SKILL	EXAMPLE OF APPROACHES
Allowing participants to reflect	"Before we start, let's take a minute to individually consider our own thoughts about the discussion question and our responses. Write down your thoughts on your worksheet."
Drawing out participants	"I want to make sure that we get a chance to hear from everyone. Let's give ____ a chance to share..."
Listen actively and reflect back	Look people in the eye, use attentive body language and paraphrase what they say. "Let me make sure I understand what you are saying. Do you mean that...?" Or "Are you saying...?"
Stay neutral	Take time beforehand to center yourself and get focused on what it will take to remain neutral. Focus on helping participants understand the task and each other. Give examples that are in the materials rather than from your experience.
Respectfully cutting someone off	"That's a good point, but I want to see if we can get some others into this conversation as well..."
Listening deeply	"So what I hear you speaking to is a concern about...did I get that right?"
Exploring different points of view	"So ____ has talked about the importance of X, and ____ has raised some concerns with X, I'm wondering how others see this question."
Testing for support among ideas	"There seem to be several people who share the view that...are others on board with that view?"
Keeping the group on time	"It is time to move on to the next discussion question because there is an important vote coming up...If there is time to get back to this discussion we will do that..." or "We need to get back on track; we have about 5 minutes left and I want to see if there are any other key ideas that we've not heard so far..."

PROGRAM ACTIVITIES & AGENDA

TIME (All times EDT)	HOST FACILITATOR TASKS
11:30 a.m. (15 minutes) Opening in Local Site	<ul style="list-style-type: none"> • Welcome participants have them sign in with the Sign in Sheet. • Introduce yourself and why you are hosting the conversation • Thank anyone who has helped you with organizing the event • Explain that they are part of a national program that will begin in 15 minutes. There are town meetings all across the country, some with just 5-10 people, other with 500 people. • Explain that your group will be following along with the national program via webcast, and that you will be sharing the ideas generated at your site at the end of the program through the Internet. • Distribute the discussion materials, which include Budget 101, Options Workbook and some worksheets. • If you have time, ask participants to review these materials.
11:45 a.m. (15 minutes) National Opening	<ul style="list-style-type: none"> • On the webcast, you will watch a welcome and introduction of the program • Welcome from the funders. • Encourage participants to watch the program. • Greet latecomers and orient them to where we are in the program.
12:00 (10 minutes) Hello's Across the Country	<ul style="list-style-type: none"> • On the webcast, you will watch people say hello all across the country
12:10 (5 minutes) Program Overview	<ul style="list-style-type: none"> • On the webcast, you will watch the lead facilitators explain how the program will work

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>12:15 p.m. (20 minutes)</p> <p>Table Introductions and Ground Rules</p>	<p>Remind participants that time parameters are strict because we are coordinating so many people in multiple locations. You will need to be consistent with time allowances for each discussion task, starting with this one. Use Worksheet #1 to assist with this task.</p> <ul style="list-style-type: none"> • Two-part table task: introductions and ground rules <p style="padding-left: 40px;">Part 1: Share your name, where you are from, and complete the phrase: <i>And in a sentence, I'd like you to share your greatest hope for the future of the country that your children, grandchildren and future generations will inherit.</i></p> <p style="padding-left: 40px;">Part 2: What discussion ground rules will ensure that we have a productive discussion where everyone is heard?</p> <ul style="list-style-type: none"> • Begin by asking participants to take a moment to use their worksheet to complete the sentence: "I you to share your greatest hope ..." • Once most participants are done writing, go around the table and ask each participant to share their name, where they are from and what they wrote to complete the sentence. • Record each statement from each participant about why they attended, so that you can submit this data later on to AmericaSpeaks over the Internet. • Read the ground rules that have been provided on the worksheet. Remind participants that offering candid opinions, asking questions for clarity and respecting others' opinions are critical to AmericaSpeaks' meetings because they maintain a safe environment for everyone. • Check to be sure they understand and agree with the basic groundrules. Make eye contact and look for heads nodding and people saying "yes." Ask participants if they have important additions to the basic groundrules. Do not invite deep discussion on this and move on if people do not have additional groundrules • Record any additional ground rules on your worksheet, so you can refer to them during the meeting. • Invite participants to join with you in holding to the ground rules respectfully during the day. • If you have extra time, go further with introductions to learn about each other.

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>12:55 p.m. (20 minutes)</p> <p>Agenda Review Demographic Polling and Theme Team Report</p>	<p>The lead facilitators will present the agenda and ask a series of multiple choice questions to learn about who is in the room.</p> <ul style="list-style-type: none"> • Use Worksheet #1a Demographic Poll – have each person fill them out and pass them in – when time permits total all respondents on a master page for submittal to AmericaSpeaks. • If time permits – share answers around the table with each other. Take time to discuss who from your community is not represented and what the implications might be for your discussion. <p>You'll also watch a brief presentation over the webcast of the themes that emerged from the earlier discussion about why people are participating.</p>
<p>12:55 p.m. (15 minutes)</p> <p>Economic Recovery</p>	<ul style="list-style-type: none"> • Invite participants at your table to briefly share their answers to the following question in no more than a sentence or two: <p><i>How have you, your family and neighbors been most affected by the recession?</i></p> <p><i>What is your highest concern today about the state of our economy?</i></p> <ul style="list-style-type: none"> • Ask them to take out worksheet #2 and use that to jot down their thoughts • Re-iterate that this is a short-term discussion about the economic recovery over the next couple years. Following this, we will transition to a longer-term discussion about fiscal sustainability over the coming decades. <p>Go around the table and each person to share their answer in no more than a sentence or two.</p> <p>There will also be a poll on current economic conditions and job stimulus. Use Worksheet 2a.</p>
<p>1:10 p.m. (7 minutes)</p> <p>Federal Budget 101</p>	<p>You'll watch a video that provides an overview of the issues that will be discussed. Ask participants to follow along with their Federal Budget 101 Guide.</p>

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>1:15 p.m. (25 minutes)</p> <p>Core Values Discussion</p>	<p>Begin the table task with the values question and three scales:</p> <p style="text-align: center;"><i>What are the core values that should guide decisions about our country's fiscal future?</i></p> <p>Ask participants to quietly review the scales that are provided on their worksheet #3 and have each person identify where s/he is at along each scale and explain why s/he identified that value position:</p> <ul style="list-style-type: none"> ○ Taking care of current generations <<>> taking care of future generations ○ Share the burden of reducing the deficit equally <<>> Place a greater burden for reducing the deficit on those more capable ○ The nation's responsibility to take care of the most vulnerable citizens <<>> individual responsibility to take care of self <ul style="list-style-type: none"> • Going around the table, ask each participant to identify where they are on each value scale and to share in one sentence why they chose that value position. • If they give more than one or two sentences, remind them you need to hear from everyone on each scale. Reference the ground rules. • Remember that we are interested in the range of opinions about each person's value choices. • You should mark a blank copy of the scales as each person shares their choices to create a composite of your table's choices. <p>Look together at the composite you marked with everyone's choices, identify where there are shared values and where there are differences among your table or among sub-sets of your table along each scale. Remind participants that it is okay to "shift" their place on the scale as their ideas change.</p> <ul style="list-style-type: none"> • There may also be clusters of agreement in the middle, not just the ends of each scale. By being in the middle, people typically mean they equally support both values. Test to make certain that is what they mean if they are in the middle. • Record the values on the Worksheet that are supported most strongly by the group, including the statements that explain why those values matter. • If additional values surface during the discussion, record them on the worksheet if there is majority agreement.
<p>1:40 p.m. (10 minutes)</p> <p>National Whip Around on Values</p>	<ul style="list-style-type: none"> • Watch with your table as groups around the country report reflections on their values

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>1:50 p.m. (10 minutes)</p> <p>Polling and Themes from Values Discussion</p>	<p>Watch with your table as the theme team reports what they heard from the values discussion. Use Worksheet #3a for polling on values.</p> <p>Nationally, we will poll people on where they came out on the values questions. Since your table will have already recorded this information on your worksheets, you can collect the worksheets in order to submit them later. As participants at the other sites vote, you may want to take the time to discuss further what other values are important that need to guide policy makers.</p>
<p>2:00 p.m. (35 minutes)</p> <p>Budget Options Presentation and Set Up for Budget Exercise</p>	<p>Ask your participants to take out their Options Workbook. For the next half hour, we will walk through each option in the workbook. Participants should follow along.</p> <p>If you are running an abbreviated conversation, you can choose (if you want) to end the webcast right here and just proceed into your conversation about the options. Based on our experience with focus groups, we recommend, however, that you watch the presentation to ensure that participants fully understand the options and trade offs.</p>

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>2:40 p.m. (Up to 75 minutes)</p> <p>Tough Choices Part #1</p>	<p>Discussion of Touch, Choices Part 1</p> <p>The goal of the Tough Choices Exercise is to help participants consider the tradeoffs between options by working towards a goal of reducing the annual deficit by \$1.2 trillion in 2025. Use the Options Workbook, Budget Scorecard, and Worksheet #4 for this exercise.</p> <p>Make sure participants understand the options and have a chance to initially weigh in. By going through the options one by one, and expressing preferences, you'll have a chance to get a sense for initially where your table is in relation to the overall target as well where there is the greatest need for more discussion.</p> <ul style="list-style-type: none"> • For this exercise, we will be using a 50% rule for making table decisions, rather than looking for full agreement. Participants will have an opportunity to individually vote later in the day • We will ask that different table groups start with different topics. Follow the lead of your site moderator with regard to which topic to start with. <p>Going option by option, review each option in a section highlighting arguments for and against. *Do not read options verbatim. Once you have gone through the options in a section:</p> <ol style="list-style-type: none"> 1. Ask participants to jot down their thoughts. Ask for <u>one statement each of support</u> and <u>one non-support statement</u> from the participants for each option – make sure nobody dominates the conversation or pulls the discussion off task. *Ask them to write down their choices on their notes. 2. Ask for a count (hands up or thumbs up) of people supporting each option, then those not supporting the option (hands up or thumbs down). 3. If there is majority agreement (+50%), record your table as being in support of the option on your worksheet and. If there is not agreement, move on to the next options. 4. If there is strident disagreement between people, ask each to make one argument for or against the option and then tell them (and the group) that you will need to move on. 5. If participants have new or additional options or variations on the options, record those options in the “additional options” on your worksheet. While we will not be able to assign a dollar value to these new options, they will be recorded and included in the final report to Congress. <ul style="list-style-type: none"> • Recording: Once your table agrees on your options record them so that you can submit them online later.
<p>OPTION:</p> <p>END OF 3.5 HOUR PROGRAM</p>	<p>If you are running an abbreviated program, you may choose to complete this exercise at any point. Make sure you record everyone's preferences on a worksheet, so that you can enter them into your computer.</p> <p>Take a moment to thank everyone for participating. If you have time, ask everyone to share a closing thought about the most important message that they would like to send to policy makers. Record each of their messages to submit into the computer.</p>

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>3:50 p.m. (20 minutes)</p> <p>Tough Choices Part #2: Reflection and Discussion</p>	<p>Reflection and Discussion Tasks:</p> <ul style="list-style-type: none"> - <i>Where are we relative to the target? Use polling worksheet #5a.</i> - <i>What do the choices we are making say about our values? [Enter only these responses into the computer]</i> - <i>Given our discussion about core values, what adjustments to our deficit reduction targets do we want to make?</i> <ul style="list-style-type: none"> • Take a stretch break if you need to. • One by one, ask each of the three questions above. Start out by checking in about the amount of savings your table has generated through the options it has agreed upon. Reflect as a group on how close or far you may be and what implications that may have on how you return to the exercise. Congratulate the table if they have already reached the target, but continue with the discussion and determine if any choices need to change. • Spend some time reviewing the values that you expressed earlier in the day and ask for reflections about what your choices seem to say about your values. • Record any table reflections on the Worksheet about whether your table has been consistent with its earlier stated values, whether there are new values that seem to be guiding your discussion, or whether it seems that there are inconsistencies that you will need to return to and review. • Ask follow-up, probing questions to help people find connections between choices and values – frame these contradictions as something to learn from, not something to attack. • Finally, set a game plan in terms of the options and choices that you want to revisit in the next phase of the discussion.
<p>4:10 p.m. (10 minutes)</p> <p>Whip Arounds</p>	<p>Watch the webcast as people in other meeting sites share some of their reflections on the exercise so far.</p>

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>4:20 p.m. (15 minutes)</p> <p>Tough Choices Part #3</p>	<p>Return the group to the task of reaching the target or review your choices if your table was successful in round one of reaching the target. For this phase of the exercise, your goals are to:</p> <ul style="list-style-type: none"> a) Revisit those areas that need more discussion because your group is concerned that <u>choices made were not consistent with values</u>; and b) Revisit those areas where your group believes it needs <u>more discussion to find agreement in order to reach the target</u>. <ul style="list-style-type: none"> • Begin with the areas you marked for “possible agreement,” return to budget choices and review decisions in light of deficit reduction target and core values. • As needed, kKeep track of decisions on your worksheet as well. • Again, if your table generates new options, you may record them on the worksheet. <p>Recording: When you have time you may go to the web site screen and record your final selections.</p>
<p>4:35 p.m. (20 minutes)</p> <p>Individual Polling on Options</p>	<ul style="list-style-type: none"> • Participants will be asked to indicate the degree to which they support options, including new options presented by the theme team. Use worksheet #5c. • When the poll questions are asked, make sure every participant is responding on their worksheet. • To keep it lively in the room, you can ask everyone to raise their hands as they are voting. Ask people to share why they are making the choices they are making.
<p>4:55 p.m. (15 minutes)</p> <p>Message to our Leaders</p>	<p>Table Task:</p> <ul style="list-style-type: none"> - <i>What is the most important message that you would like to send to Congress and the President’s Commission in Washington about how they should address our fiscal challenges?</i> <ul style="list-style-type: none"> • After the lead facilitator reads the task, ask participants to take a minute to write down their thoughts about a message on their worksheet. • Go around the group and let each person share the message they wrote down. Look for areas of agreement and compose messages from the group. Look for a majority message. • Record messages from your table on the worksheet for later submittal
<p>5:10p.m. (10 minutes)</p> <p>Whip Around - Messages</p>	<p>Watch as people across the country share some of the messages that they came up with.</p>

TIME (All times EDT)	HOST FACILITATOR TASKS
<p>5:20 p.m. (10 minutes)</p> <p>Next Steps Commitments</p>	<p>Task Task:</p> <ul style="list-style-type: none"> ○ <i>What is one commitment that you will make out of today's forum to stay informed, and to educate or engage others?</i> ○ <i>What actions could you take together to move forward with the ideas you developed today?</i> ○ <i>Consider volunteering to be a table captain to keep your table engaged.</i> <ul style="list-style-type: none"> • Following an introduction of the task by the lead facilitator, take a moment to let individuals think about what commitment they are most interested in making and to write down thoughts on their worksheet #7. • Go around the group and ask people to share commitments they are interested in making. • Based on where there is most energy and enthusiasm discuss actions that may address any or all of the three questions. • As the group identifies actions that individuals or group will take, record them on the worksheet.
<p>5:30 p.m. (20 minutes)</p> <p>Themes Team Report and Polling on Messages and Actions</p>	<p>Watch as the theme team presents themes about messages from across the nation, as well as examples of actions that came in from around the nation.</p> <p>Based on the list presented by the theme team, ask each participant to write down the 2-3 messages that s/he likes the best. Let each person share which option s/he wrote down. Collect the worksheet to enter into the computers.</p>
<p>5:50 p.m. (5 minutes)</p> <p>Wrap Up, Evaluation Polling and Closing Comments</p>	<ul style="list-style-type: none"> • Ask participants to fill out worksheets that correspond to the evaluation polling. Use worksheet #9. • Ask participants to share any final thoughts about the experience. • Watch the closing remarks • Thank participants • Collect worksheets so that you can enter data into the computer
<p>5:55 p.m. (5 minutes)</p> <p>Closing Whip Around</p>	<p>Watch as participants say good by across the country.</p>