Notes on Community Engagement Principles, Techniques and Tools

Multi-state Learning Collaborative Project (MLC-3) - Kansas

Community Health Assessment Learning Collaborative

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PURPOSE

The purpose of this document is to provide a quick reference to some resources that can help understand the principles and practice of community engagement for a community health assessment. The document is targeted primarily to teams engaged in the learning collaborative on community health assessment for the MLC-3 project in Kansas. The document can be used to complete some of the tasks during the collaborative or as a reference afterwards.

This is not a comprehensive review. The information in this document is a brief summary from several reference documents. The original sources and other resources about each topic are included in the text.

KNOW YOUR COMMUNITY

WHY DO YOU NEED TO GET TO KNOW YOUR COMMUNITY?

Communities can vary widely in terms of size, political power and savvy, education level, and other factors that are crucial to know about if you're going to be working with them. For example, the neighborhoods in one town may be well informed and politically powerful, but polarized on many issues; in another town people may be under informed and disorganized, but richly diverse and vibrant.

Getting to know a community entails getting to know the people there, the activities they engage in, and where these activities take place. Knowing these basic bits of information can tell you a lot about who connects with each other, the types of relationships people have, and the types of material resources people have or need. By asking questions of people about these situations, you can begin to understand the feelings, attitudes, and values people have towards each other, and why. Understanding feelings, attitudes, and values is key to any community building effort your initiative undertakes.

This information is also useful in determining needs and resources in communities. It can help you identify who might be allies in your advocacy activities, lay the groundwork for recruiting volunteers, provide information for fund-raising, or understand who might oppose your efforts and why. Knowing the community as thoroughly as possible is fundamental to everything that you do.

WHAT IS A COMMUNITY DESCRIPTION?

A community description is simply a written account and analysis that describes a community. It usually includes information about the geography, demographics, and history of a community. It also usually includes an overview of important community issues, interviews with key people, and other information that can help guide you and others when starting work in a community. A community description can be four pages or it can be 25 pages, depending on your needs.

Taking the time to write a good description of your community is a very effective way of getting to know what sort of challenges and assets you'll have to work with. Before you begin, however, sit down and make a list of the types of information you want to gather in writing your description. Try to think of any information that will be of use to you in working with your community. Some of the things you may wish to find out include the following:

* geographic boundaries of the community

* length of time the community has been in existence

* general history of the community

* key people and leaders in the community

* demographics: racial/ethnic makeup, male/female ratio, age, economic standing, education levels

* expenses, income, and in-kind support for the community's activities

* issues of most concern to the community

* morale and involvement levels

* key allies and rivals

HOW DO YOU GO ABOUT GAINING AN UNDERSTANDING OF YOUR COMMUNITY?

The first thing you'll want to do is get a feeling for your community as a whole.

1. Start off by gathering some basic tools

- If your community is one primarily defined by locale, you may want to make City Hall your first stop.
- Gather maps of the area. Having a good map helps you visualize your particular community and its relation to others.
- Visit your local library. Libraries often serve as public information centers in their communities -- you should be able to find out a lot about what's going on in your area simply by checking out the bulletin board. Spend a little time talking to the reference librarians as well; they often know a great deal about what goes on in a community.
- Following the local media should offer some insight into what's going on in your area as well.
- Finally, check out the chamber of commerce. In most towns, they will have a list of community organizations and contact persons that should give you an idea of who some of the key people are in the area you might want to contact at some point.

2. Make an initial drive through the area

Check out the places where members of the community gather: a local community activity center (if your area has one), bookstores, coffee shops, bars, regularly scheduled events -- any place you know of that serves as a meeting place for members of that community. Talk to people in the area.

3. Review the area with a preliminary list of things to watch for

Pay attention to any new growth and development in the area, as well as any signs of deterioration. The upkeep of buildings in your community will give you some insight into economic conditions in the area. Be sure to observe the social atmosphere as well --do people make eye contact on the street? Do relationships between residents seem friendly or strained? What kind of advertising do you see?

4. Contact and interview key individuals in the community

Of course, you'll want to be in touch with people who can affect your group (or are affected by it) anyway. An initial contact to gather information for your community description can be a good way to break the ice with these people. If you are already in contact with them, it's a good way to keep yourself up-to-date as well as to remind them of their importance to your organization.

Some key individuals might be the following:

- school officials and PTA leaders
- leaders of homeowner's and tenant's associations
- ministers
- leaders of local clubs and organizations
- realtors and other business people
- people who work with social service agencies
- your community's "squeaky wheels" -- folks who are known for being very vocal about their dislikes and dissatisfactions may be extremely helpful in showing you the "big picture."

Resources

Community Tool Box: http://ctb.ku.edu/en/tablecontents/sub_section_main_1020.htm

TECHNIQUES TO ENGAGE YOUR COMMUNITY

There are many different methods and techniques that can be used to promote community engagement and participation in a community health assessment. We will briefly discuss the following:

- Community forums
- Public Hearings
- Focus groups
- Key informant interviews
- Community opinion survey

COMMUNITY FORUMS

For a local assessment, a community forum (also known as public forum, or town hall meeting) is a relatively inexpensive and quick way of finding out about people's opinions and perceptions on issues such as health, nutrition, or physical activity.

A community forum is similar to a town meeting. It's open to the public and includes facilitated discussion on a specific topic. At a community forum people can meet and discuss the barriers and opportunities to eating healthy and being physically active in their own community. In addition to finding out community opinion on an issue a community forum can build community support for an idea or project.

To hold a community forum follow these steps.

1. Meeting Location. Find a site that is accessible and inviting to the intended audience. You wouldn't want to hold the community forum in a corporate conference room in the city's financial district if you are targeting people living in public housing. Market and promote the meeting date, time, and location through media outlets your intended audience uses. You will need more than one meeting, held at different times and/or at different locations if you want opinions that are representative of the different demographic groups within your community.

2. Handouts. Have pens and a sign-in sheet(s) available in the room. Be sure to have multiple copies of an agenda and/or project the meeting agenda onto a large screen or a wall.

3. Open the Meeting. Welcome everyone, ask people to sign in, review the purpose of the meeting including how the information from the meeting will be used. Review your rules for conducting the meeting including things like no interrupting, talking time limits per person, how people will be recognized, etc.

4. Meeting Content. Have a few specific questions to ask the meeting participants. In your agenda you can set a time limit for group discussion on each question.

5. Close Meeting. If possible, spend a few minutes summarizing the main points raised during the meeting and let people know what happens next. Remind people to sign in and thank them for their time.

6. Note Taking. Have several people on site to take notes. This frees the facilitator to manage the participants.

7. Facilitator. A neutral person who is experienced at managing large group discussions will make a good facilitator. The facilitator needs to try and make sure everyone is heard while keeping within the time limit.

8. Meeting Follow-up. Send people a thank you note for participating and include a brief summary of the meeting.

Holding a community forum on a controversial subject is not advised, because it may be very difficult to keep the meeting civil. There are other ways to solicit community opinion on controversial subjects including holding a public hearing, distributing community opinion surveys, or conducting key informant interviews.

PUBLIC HEARINGS

Public hearings are much more structured than community forums. They usually include a hearing committee and witnesses. Hearing committee members listen to testimony, ask questions, and issue a report. Public hearings are a good way to solicit community opinion on a topic that has many different perspectives.

To hold a public hearing follow these steps.

1. Committee Members. Choose the people who will hear the testimony, ask questions of the witnesses, and issue a report following the hearing. The summary report will have greater credibility and impact if the committee members represent different view points on an issue and/or are representative of the community.

2. Witnesses. The committee members should generate the list of witnesses. Again the more diverse this list the more credible the outcome. In addition to invited witnesses you can have a public portion to the hearing. The public should be given a time limit and a list of items or questions to address.

3. Questions. The committee members should decide on the questions they want answered during the hearing. These questions along with the public hearing agenda and how the hearing will be run need to be sent to witnesses with adequate time for them to prepare their comments. If you plan on a public portion to the hearing, this information should be released at this time.

4. Hearing. Witnesses should have prepared their testimony ahead of time and should appear as scheduled by the committee. Time needs to be allotted for committee members to ask the witnesses questions.

5. Final Report. The committee should prepare and release a final report that includes a summary of the viewpoints heard and a conclusion, if one was drawn.

FOCUS GROUPS

A focus group is a guided, small-group interview that uses group interaction to elicit information from group members. You need a skilled facilitator and experienced note taker to generate useful results. Focus group data provides insights into the attitude, perceptions, and opinions of the group participants. The group dynamics in a focus group tend to generate more ideas than individual interviews. A focus group, or a series of focus groups, is useful in gathering details regarding opinions and perceptions found through other techniques. Focus groups are not for developing consensus or for finalizing a plan.

The power of focus groups resides in their being focused. The topics are narrowly focused, usually seeking reaction to something (a program, product, shared experience, and similar). Focus groups are not intended to explore complex life issues with depth and detail. Examples:

* A focus group of pregnant women to discuss prenatal care needs.

* A focus group of senior citizens to discuss healthy lifestyle programs addressing their needs. What do they think of the programs being offered? What are their own suggestions and ideas?

Participants in focus groups are usually homogeneous: they all share an interest or experience about the issue being discussed. The group's composition and the group discussion are carefully planned to create a nonthreatening environment, in which people are free to talk openly. Members are actively encouraged to express their own opinions, and also respond to other members, as well as to questions posed by the leader.

If your team would like to conduct focus group interviews and you don’t have an experienced facilitator on the team, then consider a local community college, state college or university, or public relations firm. These organizations might have resources and/or staff with experience and expertise in conducting focus groups.

One advantage of focus groups is that members can often stimulate new thoughts for each other, which might not have otherwise occurred. But there are some downsides, too. For example, focus groups usually take more time per respondent than individual surveys -- because the group has to be recruited, and because the group itself takes time. Some group members might feel hesitant about speaking openly. And the focus group leader may sometimes need to be paid.

KEY INFORMANT INTERVIEWS

A key informant is a community resident who is in a position to know the community as a whole or know a particular demographic in the community. Interviewing a diverse array of key informants will help you understand what people in your community think are the health assets and health concerns of the community. Conducting key informant interviews is one way to collect community opinion relatively quickly.

How to Conduct a Key Informant Interview

1. Decide who will be involved in conducting the interviews, including the lead contact for this work.

2. Identify the topic(s) you will focus on in your interviews, e.g. nutrition and physical activity, breastfeeding, physical activity among the elderly, food security, school environment, etc.

3. Make a list of the key informants you will interview. Throughout the process of interviewing people you will be referred to other key informants in the community, so your list will likely expand.

4. Decide if you will use a formal or informal approach. Informal: Talk with key informants in an unstructured way to get a sense of the community opinion on an issue. Formal: Develop a questionnaire and mail it to informants, or use the questionnaire in a telephone or personal interview, group interview.

5. Develop a questionnaire. Even if you choose an informal approach, writing down what you'd like to learn will be helpful.

6. Record the interview summary. As soon as possible after the interview review your notes and prepare a summary of the interview.

7. Summarize results. Group similar answers to questions or similar ideas and themes from your interviews.

Tips

Number of interviews to conduct.

A good rule of thumb is to keep interviewing until you start hearing the same ideas repeated. But, make sure you have interviewed a mix of people that reflects the diversity in your community.

Confidentiality

Before starting your interviews, think about how you will use the results of your key informant interviews. This, in turn, affects the confidentiality you offer to those you are interviewing. One strategy is to plan on reporting results only in the aggregate, and then ask permission if you want to quote an individual.

When to use key informant interviews.

- Use key informant interviews as a one-time event to collect community opinions. Or, do key informant interviews on a regular basis to stay current with community developments.

- Use key informant interviews in combination with other community opinion results.

Good interviewees

Find key informants who understand the community and who think strategically about issues.

Multiple interviewers

If you plan on having more than one person conduct the interviews make sure everyone is trained by the same person and that they all use the same interview questions.

Active listening

Your job is to get as much information from the person as you can on the topic you are interested in. Paraphrase people's responses to make sure you understand the person and periodically summarize their ideas. Do not judge the person's responses or argue with the person you are interviewing.

COMMUNITY OPINION SURVEY

The purpose of a community opinion survey is to find out what the community perceives to be as its main concerns and assets. With a community opinion survey you can find out what the community thinks about a specific nutrition and/or physical activity issue such as adult obesity, child lead poisoning, cancer, or the nutrition and activity concerns among children with special health care needs.

A community opinion survey usually is conducted to broadly identify opinions that may be prevalent in a certain community. Responses are examined to identify common themes and prevailing opinions, but also to recognize important points of view that may be held only by a small group of people. For this purpose it is not necessary to use a probability sample (such as a simple random sample), but it is important that the survey be inclusive and reach all the segments of a community. If a survey is designed to produce exact statistics on how many people share the same view of an issue, then probability samples must be used and statistical analyses performed. Keep in mind that the community opinion survey is just one way to assess community opinion and community opinion is just one element of the community assessment process.

Tips

How to Conduct a Community Opinion Survey

1. Decide who will be involved in administering the community opinion survey including the lead contact for this work.

2. Identify the topic(s) you will focus on in your survey and identify some of the perceptions you hope to assess.

3. Develop a survey.

4. Decide on a distribution plan that includes who will be surveyed, how many people will be surveyed, and how you will administer the survey. Factors such as budget, time, politics, and the focus of the community assessment will affect these decisions. In addition, some distribution channels may limit your ability to get a representative sample of the population or may limit your ability to collect perceptions from your target audience. Some distribution ideas are inserting the survey in the local newspaper, partnering with other community-based organizations, distributing the survey at a place of how concentration of people (e.g., mall or movie theater), etc.

5. Tabulate and summarize your survey results.

Confidentiality

Before the survey is designed, discuss with your team things like how results will be used, how results will be reported, and who will see the individual surveys. Be sure to tell the people you are surveying how confidential their results will be.

Length of survey

Be conservative on the number of questions you include in the survey – you are likely to have a better response rate with fewer questions.

Response rate

Obviously, the more surveys you receive the more confident you can be with your survey conclusions. Be creative in your effort to get surveys returned. Below are some examples of strategies that have been used to increase response rates.

- One community required the community opinion survey be completed by participants in a community wellness program. They received 380 surveys.

- Another community mailed a survey to randomly selected registered voters, and called to notify everyone they were going to receive the survey. The community assessment team even hand-delivered additional survey to non-responders. The team also held community meetings throughout the county where anyone could come and complete the survey. The community meetings were well promoted. And, public health staff helped clients complete the survey at various public health clinics. They received 300 surveys.

o A small, rural community distributed a survey to every household in the county through a countywide household mailing. Immediately before the surveys were mailed, volunteers went through the phone book and called every 20th listing alerting them to the survey that was coming in the mail. The survey distribution plan was well promoted. The survey was printed in the local newspaper, advertisements were placed in the newspaper, and some articles were printed. Extra copies of the survey were also placed in waiting areas of local agencies. The survey included a tear off portion so people could enter a raffle for a $50.00 cash prize. They received 491 surveys.

Resources

University of Illinois Extension Service – Office of Program Planning and Assessment
http://ppa.aces.uiuc.edu/NeedsAsmnt.htm

Community Tool Box: http://ctb.ku.edu/en/tablecontents/sub_section_main_1048.htm

http://ctb.ku.edu/en/tablecontents/sub_section_main_1212.htm

http://ctb.ku.edu/en/tablecontents/section_1018.htm

http://ctb.ku.edu/en/tablecontents/section_1047.htm

Patton, MQ – Qualitative research and evaluation methods. 3rd edition. Sage publications, 2002

WHAT IS THE BEST COMMUNITY ENGAGEMENT TECHNIQUE?[1]

Listed below are some pluses and minuses for the community engagement techniques reviewed in this document.

Community Opinion Survey

Strengths

- Can provide you with numbers and percentages which can help build a case (especially if probability sampling is used).

- You can collect information from several people relatively quickly.

Cautions

- It's easy to ask too many, and probably unnecessary, questions making the survey too lengthy, which can affect response rate.

- The cost can be high.

- Results can be generalized only if the surveys were randomly distributed and the response rate was high.

Key Informant Interviews

Strengths

- Because you seek people out to interview, key informant interviews are a good way to obtain information from many different people.

- You may discover minority viewpoints, or more importantly silent majority views.

- The cost is minimal.

Cautions

- Results may be biased if only prominent leaders are interviewed.

Community Meetings

Strengths

[1] Adapted from *Moving to the Future: Nutrition and Physical Activity Program Planning*. http://www.movingtothefuture.org/

- Community meetings tend to make residents feel more involved and heard.

- The cost is minimal.

Cautions

- You may hear only from vocal people and those who are comfortable speaking in front of others and their opinions may only reflect what some of the community thinks.

- A meeting can turn into a gripe session or a pep rally to advocate for a cause or idea.

- Careful planning and outreach is needed to help you get a good turnout.

Focus Groups

Strengths

- Focus groups are best for deeper understanding of a perception, a program idea, a health education message, a handout, etc. For example, if a randomly-distributed community opinion survey indicated that people are opposed to collecting height and weight on grade-school children, then you could hold some focus group interviews to learn why parents of grade-school children are opposed, to learn what children think of the issue, or to test some messages for a possible campaign to change community opinion.

Cautions

- High quality results from focus group interviews require a skilled facilitator/interviewer.

- Although the actual interview time is short, 30 minutes to two hours, focus group interviews require several days worth of time from conceptualization to completion of a final report.

TOOLS THAT CAN BE USED WITH COMMUNITY ENGAGEMENT TECHNIQUES

Several Quality Improvement (QI) tools can be used in conjunction with the community engagement techniques described in this document. In this section we will mention those tools only briefly. For a more detailed discussion please refer to the memory jogger.

BRAINSTORMING

Brainstorming is a tried-and-true way to come up with ideas in a group. The method is simple. The problem is stated, and the recorder stands in front of a room with a flipchart or a blackboard. People in the group say whatever ideas pop into their minds. The recorder writes down all of the comments made.

Brainstorming is useful to generate a high volume of ideas on any topic by creating a process that is free of criticism and judgment.

Resources
Community toolbox: http://ctb.ku.edu/en/tablecontents/chapter2_section13_tools.htm; http://ctb.ku.edu/en/tablecontents/sub_section_tools_1142.htm#tool1;
Memory Jogger: page 19.

AFFINITY DIAGRAM

An Affinity Diagram is a tool that gathers large amounts of data (ideas, opinions, issues) and organizes them into groupings based on their natural relationships. It is often used as a way to organize ideas produced during a brainstorming session.

Resources
http://www.balancedscorecard.org/portals/0/pdf/affinity.pdf
http://www.mindtools.com/pages/article/newTMC_86.htm
Memory Jogger: page 12.

CAUSE AND EFFECT – FISHBONE DIAGRAM

Ishikawa diagrams (also called fishbone diagrams or cause-and-effect diagrams) are diagrams that show the causes of a certain event. Causes are usually grouped into major categories to identify these sources of variation. The categories typically include:

* People: Anyone involved with the process
* Methods: How the process is performed and the specific requirements for doing it, such as policies, procedures, rules, regulations and laws
* Machines: Any equipment, computers, tools etc. required to accomplish the job
* Materials: Raw materials, parts, pens, paper, etc. used to produce the final product
* Measurements: Data generated from the process that are used to evaluate its quality
* Environment: The conditions, such as location, time, temperature, and culture in which the process operates

In public health, relevant categories may include Methods/Procedures, Motivation/Incentives, Materials/Equipment, People, Information/Feedback, Environment, and Policy.

Resources
http://en.wikipedia.org/wiki/Ishikawa_diagram
Memory Jogger: page 22.

FORCE FIELD ANALYSIS

Force Field Analysis is a useful technique for looking at all the forces for and against a decision. In effect, it is a specialized method of weighing pros and cons. By carrying out the analysis you can plan to strengthen the forces supporting a decision, and reduce the impact of opposition to it. How to Use the Tool:

To carry out a force field analysis follow these steps:

* Describe your plan, proposal for change, or ideal status in the middle.[2]
* List all forces for change in one column on the left, and all forces against change in another column on the right.
* Assign a score to each force, from 1 (weak) to 5 (strong).

Resources
http://www.mindtools.com/pages/article/newTED_06.htm
Memory Jogger: page 63.

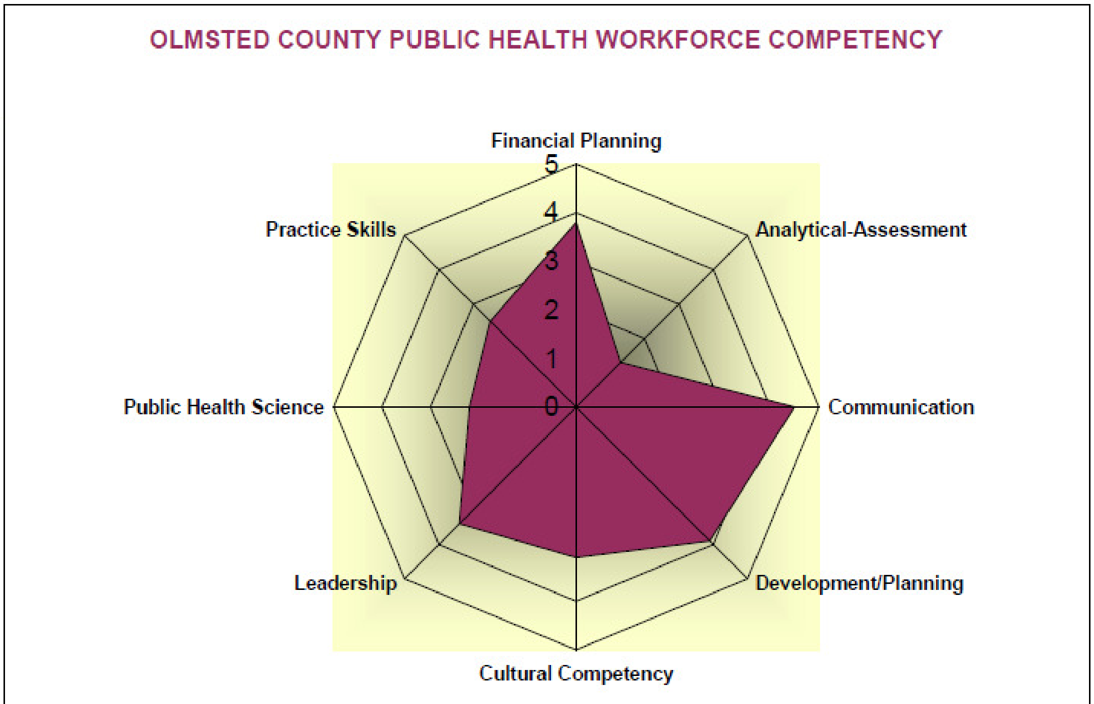
RADAR CHART

A radar chart is a graphical method of displaying multiple categories of data in the form of a two-dimensional chart on axes (which look like spokes on a wheel) starting from the same central point. The relative position and angle of the axes is typically uninformative.

For example, you could construct a chart showing the level of proficiency in your agency for each of 8 workforce competencies. Each competency would be indicated by an axis (“spoke”). The end of each axis indicates maximum capacity. The beginning (i.e., the middle of the chart) no capacity. For each competency, plot the level of capacity on the respective axis, then draw a line that connects all the capacity levels that you have plotted.

The final result helps identify large gaps and areas of strong performance. In the example below, analytical assessment appears to be a weak competency, while communication seems to be strong.

[2] The visual model can be different, e.g., write the ideal status on the top of the page.



Outer ring = Advanced
Middle ring = Knowledge
Inner ring = Awareness

Resources

http://www.mindtools.com/pages/article/newTED_06.htm

http://www.health.state.mn.us/divs/cfh/ophp/consultation/mlc2/docs/olmstedwf-radarchart.pdf

Memory Jogger: page 121.

ADDITIONAL MATERIAL

A CASE STUDY FROM A REAL EXAMPLE[3]

In North Carolina, the Community Health Assessment (CHA) is due from each county in early December. So we started the process about a year out from the due date. In my county, we convened a CHA Steering Committee comprised of some key movers and shakers, who could then help us with bringing in all the partners we need. Our team included the Healthy Carolinian's Coordinator, the Health Director, County Manager, School Superintendent, Hospital CFO, Ministerial Association Director, local American Red Cross Director and the Chamber of Commerce President. While we had the CHA process defined for us, this group developed our implementation plans and timelines. They were instrumental in bringing in partners. And while the LHD was driving the process, we did not chair any of the major committees. We let our partners do that. Our school Supt. chaired our Steering Committee and she was outstanding.

To build community engagement, we started with 2-3 articles about the process and the need for our residents to be involved. We attempted to thoroughly explain the process, the purpose and why we needed their involvement – that the CHA's success depended on it. We used randomly selected people. Using a list that we obtained from our 911 department, we sent letters explaining their selection and that they would be contacted to participate. For the 2006 survey, we selected about 1500 participants and had a response rate of over 1000. We sent a couple of letters to them and offered to make the survey as easy as possible. We did this by mail and folks could mail or email it back. We also offered that we could come out and do the survey as an interview or we could complete it by phone. During this time we also had a couple more newspaper articles. But here was a key aspect – rewarding participants. We had funds to purchase 10 $50 gift cards from Wal-Mart. Along with the survey, each person rec'd a card to complete and send back for the drawing. All completed cards were pooled after the survey closed and winners were drawn. A follow-up newspaper article was done naming the winners. As you can see we had great cooperation from our local paper – another key success factor for us.

For the hand-held survey in 2006, we also sent letters to notify them and letting them know that they could contact us with questions. If we did not catch them at home on our survey days, we left a letter asking to schedule another visit or a phone call. We also had interpreters available if needed. Another collection tool we used was a targeted approach of Wal-Mart shoppers. We spent two Saturday mornings with staff stationed at the two Wal-Mart stores in the county. We invited any shoppers willing to complete a paper version of the survey. Again, we used gift cards as an incentive to participate.

After we received our county report in 2007, we held a community forum to present the results. We invited our partners, stakeholders, Steering Committee and other participants to a session to present the results. We provided a nice meal at the country club and involved our Steering Committee members in presenting various aspects of the report. We also had newspaper

[3] Adapted from a personal communication from David Stone, University of North Carolina, 5-4-2010.

coverage for this event. While used to inform the community, it was another way to reward our core partners (a nice meal in a nice setting).

Another method we used in an earlier CHA process was community focus groups. We solicited from among our partners and had about 5 to agree. Here we let our partner set up the time, recruit group members and facilitate the session. We showed up at the scheduled time and conducted the survey. We allowed the partner to work within their group/network to get participants and to ensure they were there on the day of the focus group. After we developed the report, we held a number of community forums to review the findings and engage both community leaders and residents in action planning to develop the priorities for that community. For this process we used a Delphi type process to select priorities to work on.[4]

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[4] Delphi [pron: delfI] is based on the principle that forecasts from a structured group of experts are more accurate than those from unstructured groups or individuals. The Delphi method is a systematic, interactive forecasting method which relies on a panel of experts. The experts answer questionnaires in two or more rounds. After each round, a facilitator provides an anonymous summary of the experts' forecasts from the previous round as well as the reasons they provided for their judgments. Thus, experts are encouraged to revise their earlier answers in light of the replies of other members of their panel. It is believed that during this process the range of the answers will decrease and the group will converge towards the "correct" answer. Finally, the process is stopped after a pre-defined stop criterion (e.g. number of rounds, achievement of consensus, stability of results) and the mean or median scores of the final rounds determine the results.
For more information see http://en.wikipedia.org/wiki/Delphi_method.

CONDUCTING EFFECTIVE MEETINGS[5]

Why do you need effective meetings?

Did you know that how you manage and run your meetings is one of the biggest "risk factors" for participation and member investment in your organization? ALL of the parts of a meeting are important--planning (especially thinking through agendas and goals); logistics; and chairing skills and principles. All of these parts impact on member participation and involvement.

How do you run an effective meeting?

Running or chairing a meeting means more than just moving the group through the agenda. When you chair a meeting, you are responsible for the well-being of the group and the members in it. That demands a certain amount of attention be paid to "group dynamics" and other process issues. All of that "touchy feely" stuff is important!

Remember: Running meetings is a SKILL, not something you are born knowing how to do. Just as with any skill, you will get better with practice--and more confident, too!

PHASE I: PLANNING THE MEETING

If you pay attention to planning your meeting, you can avoid the "meeting killers" like:

- Wasting meeting time
- Wasting people's time
- Boring meetings that go nowhere
- Meetings for meeting's sake

Here are the critical steps in planning a great meeting.

1. Decide the goal of the meeting.

Is it to revise the by-laws, plan volunteer recruitment, or something else? Come up with a clear goal and the agenda becomes your road map to getting there.

2. Do your homework!

If you need information or research for the meeting, better have it done before the meeting starts. What happens when you show up at a meeting where important information is missing? It's usually a big waste of time!

3. Decide who needs to be there.

[5] Adapted and summarized from http://ctb.ku.edu/en/tablecontents/sub_section_main_1153.htm

If you are working on a billboard campaign, does the whole membership need to attend or just the Billboard Committee? Think before you send out those meeting notices !

4. Plan with others.

This is a great way to develop new leaders AND get other people more invested in the work of your group! Just get three or four interested folks together and hash out the agenda--it won't take more than an hour!

5. Good agendas count!

List the amount of time you plan for each item. If someone other than you is presenting some part of the agenda, list that too, and SEND IT OUT AT LEAST A WEEK AHEAD OF TIME. Members of any group should know what they are coming to do!

PHASE II: SETTING UP THE MEETING

1. Start and end on time.

It's disrespectful to abuse members' time and about the biggest turn-off there is! Get into the habit of starting on time EVEN if there are only three people in the room. Word will get around and eventually, people will come on time or won't come at all. If people keep showing up late, or not showing up at all, this may be a hint to change your meeting time, or your meeting pattern, or both.

2. Sign them in.
Sign-in sheets do more than tell you who came. They also help update your membership list and give you names for phone trees.

3. "Pardon me, could you move your elbow?"
Meeting spaces should be comfortable and convenient. The room should be centrally located, and the right size for the size of your group. Get there early to set up and try to use a space where you can make a circle, not sit in rows like an auditorium. If the meeting space is hard to get to for seniors or others, try to arrange transportation or perhaps a volunteer "escort" service.

4. All work and no play is no good!
Have informal time before and after the meeting for people to talk and socialize. That's a big reason people joined your group in the first place, and it's where you can recruit volunteers. Remember, sometimes "the meeting after the meeting" is where people get attached to the group--and also get their best ideas to bring to the next meeting!

5. A regular cycle
If you have a regular meeting cycle, people will start to save the date (e.g. the first Monday of the month); but DON'T HAVE A MEETING JUST TO MEET! Always have a clear goal or don't have the meeting.

PHASE III: RUNNING THE MEETING

1. Do introductions
Don't forget how good icebreakers can be to loosen everyone up! An icebreaker is something short at the beginning of the meeting to help people get to know each other or dig out some important piece of information in a fun or interesting way. For example, your group could do a "Scavenger Hunt" where people "scavenge" information about each other.

2. Get agreement on agenda and rules
Remember, it's everyone's meeting, so everyone needs to "buy in" to the agenda. You can ask for feedback on the agenda before you begin. Rules like no interrupting, etc. can also be helpful if you have some potential "disrupters" in the house.

3. Keep the discussion on track
If someone's going off the agenda or is speaking too long, pull them back in! Be gentle but firm: people respect a meeting that's run well and remember all too clearly the meetings where someone was allowed to go on and on and on.

4. Watch the time!
Remember about starting and ending! Honor agenda time limits. If the group seems to want to go beyond the agreed upon time on an issue, ask for agreement from all members.

5. Summarize what you hear
Wrap-up each agenda item by summarizing any conclusions out loud. Then move on when no one objects or everyone agrees.

6. Encourage participation
If a usually quiet person speaks, show your appreciation. Try to draw everyone in and not just let the usual suspects speak!

7. Use the power of your position wisely
Watch what you say and how and how much you say it! Don't take sides, and be fair to everyone. If you are passionate about an issue on the agenda and want to speak, make an arrangement BEFORE the meeting for someone else to chair that section.

8. Develop new leaders by handing over the gavel
Try rotating chairing responsibility. The only way others will learn is by watching you and then doing.
Some tips for managing people in the meeting:
* Have a sense of humor, and don't be defensive.
* Use open-ended questions that require people to say more than "yes" or "no."
* Look around the room and watch for signs that you should slow things down or speed them up.

PHASE IV: FOLLOWING UP ON THE MEETING

1. Gather feedback from the group.
You will want to gather information about how the participants felt about the meeting, what could be improved, etc. You may not want to do this at every meeting, but at least once in a while; making sure that people have clear assignments, setting or reaffirming the date for the next meeting, and maximizing opportunities for people to stay around and talk after the meeting (which is very important).

2. Make follow-up calls
The Chair or a designated person may want to make follow-up calls, send out follow -up correspondence, and/or take some follow-up actions. These after-the-meeting activities often serve as the glue that hold the group together.

3. Summarizing the meeting
It's helpful to have a list of the decisions made, with follow-ups. Formal minutes are valuable for many (not all) organizations--they contain announcements, informational items, etc., that are important to report even though they are not "decisions. "
Writing up minutes can be boring, and so can reading them. But that's part of the job the secretary took on. Some alternatives can include:
* Have a volunteer do a meeting summary sheet, in addition to the minutes
* Have the minutes read more like a story than a formal roman-numerals-type report. Also, place the decisions made in boldface or ALL CAPS, so they stand out. Ditto for follow-ups.

Resources

Community Tool Box: http://ctb.ku.edu

TIPS FOR CONDUCTING GOOD INTERVIEWS[6]

Once you have decided who to interview, take a look at the following tips on conducting interviews.

- Dress accordingly -- you'll probably want to wear something much different for a cup of coffee with a homeowner than an interview with the president of the bank. Think about your comfort, as well as that of the interviewee. Would a teenager be more comfortable if you wore jeans or a suit? Would a local politician be offended if you show up in shorts? Think carefully about this; how you dress and act can have a huge impact on what you hear.
- If possible, take someone along with you to take notes or bring a tape recorder so you can concentrate on just directing the conversation.
- Take a few minutes to make small talk and make your interviewee comfortable. If you are doing the interview on your home turf (your office, for example), or even a neutral site, ask about his physical comfort. Offer him a drink; explain where the bathroom is. Showing you are concerned about their comfort can be the first step towards a trusting relationship.
- Explain why you have asked for the interview. Be very clear with what will be done with the results of your interview -- is this just for your own personal reference, or could it going to end up in a formal report or the local newspaper? Give the interviewee a chance to ask any questions he or she might have about your presence.
- Ask questions to follow up on any leads that come out of what the interviewee has said so far. Start directing the conversation a bit more, but base your questions on statements that the interviewee has made.
- Try asking things in different ways. If you're having difficulty getting the interviewee to understand any of your questions, you can use your own experience to illustrate situations you're concerned with.
- Another technique you may want to use to get more information from the interviewee is to bring up hypothetical situations -- the "what if?" questions. For example, "What if a needle exchange program were started downtown to cut down on HIV infection? Do you think community leaders would support it or be opposed to it?" The interviewee will often respond with examples of how similar things have occurred in the neighborhood.
- Let the interviewee end the interview. Once you've gathered all the information you need, ask the interviewee what he or she wants to know from you. The interviewee will feel validated by the opportunity to express his or her questions, and the questions may reveal more useful information to you.
- Thank the interviewee for his or her time. Following up with a short thank-you note isn't just good manners --it helps your contacts remember who you are, and leaves them with a positive impression. That way, they're more willing to work with you in the future.

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[6] Adapted from Community Tool Box: http://ctb.ku.edu/en/tablecontents/sub_section_main_1020.htm and http://ctb.ku.edu/en/tablecontents/sub_section_main_1047.htm