Clear Vision Eau Claire
COACHES MANUAL

A collection of core concepts, core strategies, and core practices, anchored by a Public Work philosophy as advanced by the Center for Democracy and Citizenship, Augsburg College.
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Clear Vision and the Clear Vision Process

In June 2007, community members in Eau Claire, Wisconsin collaborated with area governments, school institutions, and civil society organizations to implement Clear Vision (Eau Claire), an inclusive citizen-based community visioning and strategic planning initiative. From the original initiative, Clear Vision has become a non-profit organization with a mission “to engage all citizens to reach a common goal and purpose”. The Bylaws of Clear Vision Eau Claire, Inc. state that the corporation is organized to “convene, nurture, and support diverse groups in community problem solving that engages members of the greater Eau Claire community in active, meaningful citizen involvement, working for the common good for the future of the residents of the community...”. Clear Vision recognizes that some community issues are exceedingly complex and resolution of those issues is beyond the capabilities of any single organization or person. A resultant central theme of the initiative was that democratic politics begins with conversations citizens have about the common good and the choices they make about the kind of community they want. Using a civic organizing framework, Clear Vision has expanded the community capacity for effective participatory citizenship and collaborative institutional decision-making by government, business and civil society.

The Concept and Philosophy of Public Work

The Center for Democracy and Citizenship (CDC) develops citizenship initiatives around the concept of public work. Public work is sustained, visible, serious effort by a diverse mix of ordinary people that creates things of lasting civic or public significance.

The ultimate goal is a flourishing democratic way of life, created through a different kind of politics in which citizens take center stage. We believe citizenship is best seen as work, whether paid or unpaid, that has public meaning, lasting public impact, and contributes to the commonwealth. Public work is different than citizenship as charity, or community service where the emphasis is on help the needy. It is also different than protest politics, which demonizes an enemy. Public work interacts with the world to leave a legacy. It changes the community, the larger world, and the people involved.

The term public means “a public,” a diverse group of people united around a common goal. It means “in public,” a space that is open, visible, in which cultures of accountable public behavior can form. And it means some product that is of general use and benefit – a public thing, a public interest, a form of commonwealth.

On another level, the search for a brief definition can be a problem. We live in a world where techniques, methods and how-tos replace questions of Why? And “so what?” As an idea, public
work can open many discussions about the dimensions, possibilities, impacts, and meanings of work of different kinds. As the Center for Democracy and Citizenship has worked with this concept, public work has emerged as a practical philosophy informed by several currents of thought and action.

**Practical Philosophy**
Something practical is obtained through practice or action. It is workable, useful, and sensible. The CDC grounds its work in “practice” and makes it “practical.” Our practice-oriented approach includes a theory about knowledge called “pragmatism” which stresses the constructed, open-ended nature of our conceptual world where ideas emerge from and need to be tested and improved by practice.

People are creators of the world of ideas in which we live and work. This world of ideas shapes our sense of possibility and our range of action.

The notion that all people, not just credentialed academics or intellectuals, help create or are even interested in political ideas goes against the grain of most theorizing. Many philosophers hold that thinking about and creating “great ideas” is the activity of a class of intellectuals apart from common life. Practice-oriented theorists, in contrast, stress the political nature of idea-creation. Seeing the creation of public concepts as political action opens up new possibilities for democracy.

Public work is a philosophy; a theoretical framework that draws upon diverse intellectual traditions and aims to have broad explanatory power about the craft of democratic action.

**Conceptions of human beings as producers or co-creators of the world**
Public work stresses the idea of work, of productive labor. It draws attention to humans’ creative action in shaping the environment, as well as our existence as part of the environment we help to create. Our theoretical roots stress work as a way of developing human talents, connecting people to each other and to society, and generating a sense of the world as open-ended and co-created by human beings. Work furnishes a way of seeing people as contributors rather than victims, volunteers, or consumers.

**Conceptions of public life**
Public work highlights the importance of public life to a full human existence. Our ideas of public life draw from classical notions of the Greeks and from the civic republican traditions of the Italian Renaissance. They build on convictions about public life and public conversation that animated the American Revolution and other broad freedom movements in our history; they draw from traditions of “building the commons” and public deliberation that many immigrant groups brought with them.

**Conceptions of democratic, relational politics**
The third tradition in public work is a way of thinking about politics itself that brings us back to the root meaning, from the Greek word *políticos* meaning “of the citizen.”
Public work politics teaches people to work across party lines and partisan differences. Diverse groups have come together to create parks, schools, and libraries, to organize civic holidays or movements for social reform. Institutions such as political parties, religious congregations, unions and commercial associations, settlements, cooperative extension, schools, colleges and other were once “mediating institutions” that connected everyday life to public affairs. They also taught an everyday politics of bargaining, negotiating, problem solving. People learned to deal with others that they may disagree with on religion or ideology. They gained a sense of stake and ownership in the democracy.

Such experiences of everyday political education and action have declined. Many institutions have become service delivery operations in which experts or professionals deliver the goods to clients or customers. Many forms of citizen politics have been reshaped as large scale mobilizations like the canvass or direct mail solicitations, in which issues are cast in “good” and “evil” terms and solutions are often vastly oversimplified. Public work politics aims at renewing the civic muscle of mediating institutions and teaching the skills and habits of many-sided public action.

Public work is an evolving framework that speaks to central challenges of our time. It defines citizenship as “work,” not simply service or volunteerism. It puts many jobs and the purposes of institutions on the map for discussion and change. When occupations and institutions recover their public meanings, democracy becomes more substantial, robust, and vital. By defining politics as an aspect of every environment – and as our collective work in shaping a common way life – public work dissolves the distinction between a separate government, a “them” responsible for our problems, and “the people,” innocent and aggrieved. Our government and our democratic way of life become what we make them, and reflection of ourselves. They are works in progress.

Public Work and Other Approaches for Civic Engagement

Though one might believe that today’s politics are completely polarized, there are many different individuals, groups, organizations and institutions engaged in citizen politics. In order to better understand what public work is, the following provides a context to compare public work to civics and communitarian approaches for public engagement.

None of the approaches are “wrong”. Each of the approaches has its distinctive understanding of democracy, citizenship and citizen education. The approaches are not isolated from each other; a group or organization often combines two or more of the approaches.

Civics Approach
The government centered “civics” approach focuses on building knowledge about government. In civics, people learn about things such as how a bill becomes law, separation of powers, elections, and how to influence government. The model citizen in the civics approach is the informed voter.
One issue with this approach is that it is oriented to the allocation of resources. The stress is on “what can I/we get.” Accordingly, civics embraces partisan politics and the competition for power. The result is people are left outside of the actual public problem solving. While citizens can influence legislation, the actual work is done by experts.

Communitarian Approach
The “civil society or communitarian” approach holds that the model citizen is a volunteer. The emphasis is that citizens learn to be responsible members of a community and develop habits of voluntary involvement. Practices like community service help develop the citizen’s sense of contribution, empathy and participation. Communitarians stress the need for a moral community, and the teaching of a common set of values.

There is a danger that the communitarian approach can become exclusive and parochial. The focus on community ignores some of the larger issues of public life and could be considered reactive in the sense of “not in my backyard”. There is also the danger that the benefits of volunteering are focused on the volunteer. Instead of civic engagement, the focus is on charity, or feeling good because you gave something back.

Public Work Approach
Public Work is different and unique because it emphasizes the serious, life-changing work of citizenship, enhances the authority of ordinary people, and directly challenges the marketplace conceptions the citizen-as-consumer that can weaken democracy. It views civic education in terms of creating multiple opportunities for people to do public work with others.

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<thead>
<tr>
<th></th>
<th>CIVIC</th>
<th>COMMUNITARIAN</th>
<th>PUBLIC WORK</th>
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<tbody>
<tr>
<td>What is democracy?</td>
<td>Representative Institutions, the rule of law</td>
<td>Representative government and civil society</td>
<td>The “work of the people,” engaged in creating public goods and public institutions</td>
</tr>
<tr>
<td>What is politics?</td>
<td>Distribution of goods, services (who gets, how, when)</td>
<td>Generating a spirit of community</td>
<td>Creating the commonwealth</td>
</tr>
<tr>
<td>Citizenship</td>
<td>Voter</td>
<td>Volunteer</td>
<td>Civic co-producer</td>
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<tr>
<td>Source of citizen authority</td>
<td>Voting</td>
<td>Communal wisdom, values</td>
<td>Contributions to commonwealth</td>
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</table>
### Government role

- **CIVIC**
  - “For the people”: to provide services, guarantee rights

- **COMMUNITARIAN**
  - “Of the people”: to express and promote civic values

- **PUBLIC WORK**
  - “By the people”: to catalyze public work; provide tools for public work

### Civic Education

- **CIVIC**
  - Programs that teach about laws, elections, how a bill becomes law
  - Example: Youth in government

- **COMMUNITARIAN**
  - Programs teaching values of civic responsibility
  - Example: Community service, service learning

- **PUBLIC WORK**
  - Projects teaching skills, habits, and intellectual concepts of public work
  - Example: Work Teams for Specific Projects

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### Core Elements of the Clear Vision Process

#### Participant Elements

- Teams are comprised of community members that choose to participate in the Clear Vision process and choose issues through a deliberative process.
- Issues are pursued in a legal fashion, are grounded in the participants’ passion, values and interest, have a public quality by making a community contribution.
- Team actions are real work, taking place over time, have many steps and have identifiable, tangible results, outcomes or products.
- Community members use evaluation to learn from experiences – both successes and failures.
- Teams formally meet on a regularly scheduled basis.

#### Coach Elements

- Coaches help teams/work groups to do their public work, learn from their tasks and identify key civic concepts through their work (such as public work, citizenship, democracy).
- Coaches participate in training sessions that involve Clear Vision core concepts, skill development and methodology.
- Coaching mentors help to support, train and coordinate the coaches’ work.
Learning Expectations
The Clear Vision process does not expect every work group/team to accomplish all their goals, yet there is an expectation that team members should learn more about public work during the process. Key elements of the public work learning process include: community members should have a central role in the planning and design of the work, and should take responsibility for success or failure of their project.

Through working on projects, community team members should learn:
- to define a community problem and identify their stake in it;
- work on an issue with a diverse group of people;
- map the political environment so they will understand relationships important to addressing the issue;
- develop problem solving strategies and take action;
- evaluate their work and roles to further develop their capacity for effective action in the community.

As teams work on issues, their understanding of the problem will change and their goal and action plan will change. Teams may or may not solve the problem they define. Public Work is the lesson that will be learned from the team’s successes and failures.

Roles of in the Clear Vision Process
The Clear Vision process includes different roles for many people and organizations to collaboratively do public work in the community. Many individuals and groups are involved to support the teams and coaches as they work through their action plans.

Teams/Work Groups
Team or Work Groups are the basic organizing unit of the Clear Vision process. The teams engage in public work, with coaches, to solve public problems that are important to them.

Coaches
Coaches are community members who act as guides for the teams as they engage in their public problem solving work. They work closely with their mentors to ensure that their teams gain an understanding of, and practical experience in utilizing the Clear Vision process, concepts and skills to do public work.

Coach Mentors
Mentors coordinate, train, support and supervise the coaches’ work; creates an accountability structure, and serve as the coaches’ liaison to the Clear Vision Board.

Clear Vision Board Members
Clear Vision Board Members are community members who voluntarily serve on the Clear Vision Board to provide a framework and support to further the Clear Vision mission “to engage all citizens to reach a common goal and purpose”. Board members build community capacity by convening annual Empowerment Summits, hosting Open Houses and year end celebrations,
conducting community outreach and engagement and work to sustain the Clear Vision organization.

### Core Concepts
The Clear Vision process includes the following underlying core concepts.

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<tr>
<th>Public Work</th>
<th>The visible effort of ordinary citizens who cooperatively produce and sustain things of lasting importance in our communities, nation or world.</th>
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<tr>
<td>Politics</td>
<td>The practice of power and governance; the art and science of how public decisions are made</td>
</tr>
<tr>
<td>Citizenship</td>
<td>An individual’s rights, responsibilities and contributions to her or his community. In Public Achievement, we view individuals—regardless of age or legal status—as public actors or citizens.</td>
</tr>
<tr>
<td>Democracy</td>
<td>Rule by the common people. In Public Achievement, we believe that democracy rests upon people learning skills, concepts and values that citizens need in order to exercise leadership, to participate in decision-making processes, and to build our common world.</td>
</tr>
<tr>
<td>Freedom (freedom from)</td>
<td>The absence of undue restraint and coercion.</td>
</tr>
<tr>
<td></td>
<td>The liberation of our talents and energy for collective creation.</td>
</tr>
<tr>
<td>Public</td>
<td>Three related meanings are relevant to Public Achievement: 1. A group of people. 2. A kind of space that is open, visible and widely accessible. 3. Something that is in the interest of all.</td>
</tr>
<tr>
<td>(Self) Interests</td>
<td>An individual’s motivations, preferences, needs, background, hopes, and dreams all shape their self-interest. People are more likely to become active on an issue about which they have strong feelings.</td>
</tr>
<tr>
<td>Diversity</td>
<td>A fact of public life. To effectively solve public problems, we must learn to listen to, and appreciate and work with, others who are affected by the same issues.</td>
</tr>
<tr>
<td>Power</td>
<td>The ability to get things done. Public Achievement views power as dynamic, interactive, and multi-directional, not a scarce commodity that one person has and others lack.</td>
</tr>
<tr>
<td>Relationships</td>
<td>What needs to be developed with diverse individuals or groups in order to gain power and accomplish public work? Relationships are built on common or complimentary self-interests and respect for diverse contributions.</td>
</tr>
<tr>
<td>Free Spaces</td>
<td>The concepts of public and freedom are combined in the idea of free spaces. Free spaces refer to the physical, legal, and psychic time and space necessary to act in public. Public Achievement provides that space, and presents an opportunity for citizens to create their own free spaces for action.</td>
</tr>
<tr>
<td>Accountability/Responsibility</td>
<td>Accountability and responsibility are both public skills and concepts. The skill centers on being accountable for one’s actions or words. In the context of public work, one is accountable to her or his self, group, site, and community.</td>
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Core (Civic) Skills
Clear Vision has adopted core civic skills that assist team members in their problem solving efforts and activities.

Values House Meeting
When called upon, people can take up the challenge of becoming architects of a democratic way of life and positive civic culture, not simply democracy’s spectators and consumers. One of the approaches used is small public conversations, or “values house meetings.” These are structured conversations through which participants will identify civic values and discuss strategies for civic vitality.

Below is a guide for facilitators.
Planning the meeting:
- Invite participants directly, through personal contact.
- An ideal size is 7-14 people. It can work with as few as 4 or 5, but a bigger group with a more diverse mix will yield better discussion. If you have more than 14 people, consider holding two separate forums.
- All participants should read a short thought piece (in advance) on, for example, values, democratic/public work, or similar processes done in other communities.
- The discussion part of the meeting will last an hour and a half. There can be informal socializing after or before.
- Choose a casual, informal setting.
- Identify someone to take careful notes.

Meeting format:
- The moderator, who may be a convener or host or someone else, begins with a welcome. Tell the group why you think this is an important discussion.
- Follow with round-robin introductions and brief statements-what interested people in this meeting? Why did they choose to come?
- Then the moderator (may be convener or host or someone else) poses three questions:
  - What values and traditions are important to you (from family, faith, civic, or other traditions)? What are the values and traditions of this community?
  - What are the trends or forces that endanger these values and traditions?
  - What can we do in our neighborhood, organization, or larger community to strengthen our civic life?

After the meeting:
- Document your reflections on the forum, the key themes and notable quotes.
- Follow up with participants who agreed to take action as a result of the discussion.

Power Mapping
Why map? Mapping is a tool that helps to identify and understand the political and cultural resources that affect and are affected by an issue. It can narrow and clarify a complex and broad issue into something more concrete and workable. Maps can expand a narrow school or community issue by helping your group to consider others who might have an interest or investment in your topic. Mapping gives your team a deeper understanding of the problem when they have analyzed all potential stakeholders. It also provides a visual representation of the people you may have to work with to make an action strategy and accomplish your goal. Your
map will evolve and change as you talk to new people, get new information, and implement your plan.

Public vs. Private: A Challenge to Build a Public Life

Learning civic skills. Taking public action. Improving our world.

By doing one-to-ones, you are laying the foundation of creating public power, through building relationships. The relationships you building are not extensions of family and friendship ties; but are public. The following distinctions may help you to systematically construct a public life:

<table>
<thead>
<tr>
<th>Examples and Distinction: Public and Private Relationships</th>
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<tbody>
<tr>
<td><strong>Public Relationships—Examples</strong></td>
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<tr>
<td>Fellow Workers</td>
</tr>
<tr>
<td>Boss/Employee</td>
</tr>
<tr>
<td>Pastor/Doctor/Lawyer</td>
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<tr>
<td>Car Salesman/Politician</td>
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<tr>
<td>Banker/Teacher</td>
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<table>
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<tr>
<th><strong>Public Relationships—Distinctions</strong></th>
<th><strong>Private Relationships—Distinctions</strong></th>
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</thead>
<tbody>
<tr>
<td>We need seeks respect</td>
<td>We seek love</td>
</tr>
<tr>
<td>Formal/Contractual</td>
<td>Casual/Intimate</td>
</tr>
<tr>
<td>Overt/Above Board/Objective</td>
<td>Covert/Indirect/Subjective</td>
</tr>
<tr>
<td>Self-Interest/Quid Pro Quo</td>
<td>Blood/Kinship/Feelings</td>
</tr>
<tr>
<td>Temporary</td>
<td>Permanent</td>
</tr>
<tr>
<td>Focused/With an Agenda/Planned</td>
<td>Spontaneous</td>
</tr>
<tr>
<td>Diversity/Pluralism</td>
<td>Similarity/Homogeneity</td>
</tr>
<tr>
<td>Tension/Conflict/Agitation</td>
<td>Peace/Harmony</td>
</tr>
<tr>
<td>Power</td>
<td>Love</td>
</tr>
<tr>
<td>Accountability</td>
<td>Sacrifice/Self-giving</td>
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Observe successful politicians and business leaders — they understand that in public life there are no permanent friends and no permanent enemies. They are not afraid to create tension and seek to do so. Their relationships are based on quid pro quo, accountability and self-interest.

At the same time this distinction is often used to manipulate us. Politicians like to shake hands and kiss babies to get us to believe that they care about us as if we were family or friends; and we let them off the hook—we don’t hold them accountable. The doctor and car salesman want us to believe they really care for us to make us less likely to critically examine their products and services.

Professionals in the public arena know the distinction and blur it to their advantage.
**One-On-One Interviews**

A one-on-one interview is an intentional process of getting to know what motivates another person. It helps to develop respect for people different backgrounds and is the foundation for work across differences. Some call the one-on-one the genius of the new generation of civic efforts because it breaks down stereotypes and it also changes the rules of involvement.

Today, much activism is based on the idea of “outreach,” trying to get people involved in the issues which have already been defined, directed toward outcomes already determined. If you use one-one-ones to find out others’ self-interests and build on them in serious ways, you are doing something different: enlisting people by engaging them in what they are interested in. You begin to co-create the civic effort together.

A one-on-one involves a conscious exploration of another person’s interests, passions, most important relationships, and stories. One-on-ones depend on putting aside prejudgments and stereotypes and listening carefully and strategically. If you do this much, people will constantly surprise and sometimes amaze you with talents and insights you never imagined. One-on-one interviews are also a way to develop new power through building public relationships across lines of difference. Like other civic skills, they involve a good deal of practice.

To find out others’ self-interests requires that you learn to listen in a particular way, with attention to body language, emotional tone, a sparkle in the eye. You identify what energizes and activates the other person. One-on-ones aim at “public knowledge”- you are listening for people’s public interests and potential to take action with others. You are not creating a therapeutic or intimate relationship, where you delve into hardships in order to provide comfort.

**Public Evaluations**

Leave time at the end of every meeting to have your team sit in a circle and answer a series of evaluative questions. Try having the members evaluate their individual and collective work as well as the impact of their project on the community. During this debriefing time, you can also focus on an individual core concept to reinforce it and begin to add to the team members’ understanding.

Evaluation improves the quality of your team's work because it ensures they are staying true to their initial goals, provides space for learning and strategic thinking, and develops accountability. It requires the team members to think critically about what they have done personally, and then collectively as a team. For evaluation to be truly effective, the team should do it every step of the way. It helps them operate smoothly, examine how their work is progressing, prevent misunderstandings, clarify roles, and assess the overall impact of their project. Evaluation is also the time to identify and reinforce things that a group has learned from the session, work, or event.

While evaluation helps your team move forward on its project, it is also important to reflect upon what has been learned. You need to provide the space so that individual team members can link their experiences to the broader world, ways of thinking, and ways of being. This is a good
opportunity to question the assumptions of your work, and even the assumptions of civic problem-solving itself. Taking the discussion to a higher level will enable you go beyond everyday ways of thinking. This is the perfect time to talk about concepts, how they relate to your work and the broader world. Nonetheless, this type of reflection will not occur if space is not given for it. Periodically take the time to engage society's big questions, and you will be surprised what you find.

**THE COACH**

**Expectations and Time Commitment**
A Clear Vision coach generally commits to about 3-5 hours every two weeks. This includes times to meet with the teams (usually every other week or twice a month for an hour), debriefing sessions, preparation for meetings and planning with the co-coach, meeting on a quarterly basis with other coaches, and any other work outside of the team sessions.

Coaches are also expected to work with teams for the duration of the Empowerment Summit year, usually 9-12 months. Coaching Clear Vision teams is a big commitment and we expect that coaches dedicate themselves to the see the projects through to their conclusion.

Coaches are expected to take an active role in the quarterly coaches’ sessions, and their input and experience can be extremely useful to other coaches as this is the primary avenue for coach development, training, teaching, and learning.

Coaching is fun, but coaches are also accountable to their groups and to Clear Vision. They should model positive public behavior at all times.

**What It Means to Be a Coach**
Coaches are always trying to figure out what it means, exactly, to be a coach and this is often a matter of ongoing negotiation with the team. This relationship between coach and group is especially important in the first few weeks of working together.

Coaches must be boundary workers. On one hand they view the project as belonging to the members of the team, what the team wants to address, and how the team wants the project to develop. On the other hand, coaches are adults who are in charge of their groups and the Clear Vision process, and they bear part of the responsibility for the success and failure of the group.

The task is difficult, and there are no cookbooks or formulas to give exact guidance to coaches. In the end it is really up to the coaches to discover how their group interacts with each other and themselves, and to devise strategies for a positive and productive working relationship.

Coaches work with the group to develop a “game plan,” which is constructed democratically over time. Winning is not the ultimate goal in the Clear Vision process. The goals is to have everyone learn the process and use it to successfully complete the project.
Coaching Elements
Here are twelve elements that can make for an effective coach. These are ways to think about coaching rather than a prescription for coaching.

1. Be a citizen—empower others to take their role as an active, engaged, and ethical citizen seriously.

2. Be proactive—coaches do not do the work of or for the team, rather they are constantly thinking of ways to empower the team to accomplish its goals. This may mean constantly thinking how to help the team, or it may mean intervening at the rights moments to maintain a constructive environment.

3. Be a Political Educator/Learner—in the Clear Vision process, each person is an active participant in teaching and learning. Coaches learn and empower with their groups. Coaches are constantly on the lookout for “teachable moments” to exercise their role as a political and power educator. Evaluation, and not just at the end of meetings, is an important part of this process, as is making connections between their work and broader issues (big picture).

4. Be a Facilitator—the main role of the coach. Coaches may need to turn anger and frustration back into positive productive work.

5. Be a Challenger—it is okay for coaches to challenge group members and hold them accountable for work that they have promised to do. High but realistic and explicit expectations, hard work, excellence, and respect for all are key elements of the challenger role. So may also be the skill of “planting seeds.”

6. Create a Positive Work Environment—coaches set the stage for planned, organized, and smoothly flowing meetings. See Management Techniques

7. Ask the Right Questions—remember the 5 whys.

8. Be Accountable

9. Be Prepared

10. Use Resources—each other, coaches manual, Clear Vision Board Liaison

11. Record and Share Experiences

12. Have Fun

Management Techniques
Coaches often report that group management is one of the biggest challenges they face—especially in the first few weeks. There is no single way to maintain group discipline, and much depends on the personality of the coach and the group members. Here are some useful ideas to ensure that everyone in your groups treats each other with respect.

1. Make it clear that your role is to help them learn the Clear Vision process and reach their goal.
2. Be explicit about group expectations from the very beginning—group rules can be formulated in a Values House type of exercise, and respect for all, public accountability, and civility should be part of the rules. Be sure they are reinforced or revisited.

3. Address disrespectful behavior immediately.

4. Establish a formal structure and routine to meetings (see Conducting Effective Meetings and Bob’s Rules of Order).

5. Always have something for the group to do.

6. Model good facilitator behavior

7. Practice art of deciding when it is better to pull an individual aside and when it is better to address issues in the group

8. Include team building exercises, especially in the early meetings (even public evaluation can be team building).

9. Reach out to others (coaches, liaison to the CV Board) for help with sticky issues

10. Remember that conflict and disagreements are expected—public work is messy work

Effective Meetings
No one wants to attend meaningless meetings. Vow from the very beginning that all meetings will have a purpose, that agendas will be developed by all members of the group, and that you will as a coach pay attention to three main effective meetings characteristics: Clarity, Process, and Structure.

Clarity comes from carefully planned meetings with specific agendas with that are constructed using careful consideration of the order of the items. Agenda items can also be given an estimated time and coaches (or a timekeeper) can keep the group on track.

Process comes from ensuring that everyone feels that they have a voice and are respected. Public evaluation as part of the meeting is also part of the process. Another important part is allowing all members of the group to provide items for the agenda.

Structure. In the beginning each group needs to spend some time deciding and covenanting on how they will work together. Group processes can range from one end of a scale that stresses leaderless or shared facilitation and consensus decision-making, to groups that adopt the official version of Robert’s Rules for Order with very clear and rigid structure and process. For most Clear Vision groups that are small and are composed of a group of people who are passionate about the group’s goals, the consensus model can work. However, for larger groups that do not respond well to a consensus model Robert’s Rules can be utilized. Further suggestions for effective meetings are in the Appendix under “20 Tips for Effective Meetings.”
Bob’s Rules of Order
A much easier set of rules for structure is a modification and simplification of Robert’s Rules of Order called Bob’s Rules of Order. Bob’s has a much simplified decision-making structure, and any further decisions are left up to the team leaders or in this case the team coaches. A handout listing “Bob’s Rules of Order” is in the appendix.

The Process

Action Teams
Effective group development is a key to successful CV teams. Focusing on group development is about paying attention to how people work together. In CV, coaches need to be attentive to both the individual and the group in order to be attentive to group development. We cannot assume that all people know how to work in small groups. Therefore, it is important that coaches focus on group development from the beginning. Moreover, coaches need to intentionally facilitate a process where group members get to know one another, learn to work together as a team and are able to talk about and reflect on their work as a group.

General Tips for Getting Started
- As a team, establish expectations—for yourself as a coach, individual team members and for group as a whole
- Together, develop team rules and consequences; group norms
- Develop a mission statement or Action Charter or both. Both the team rules and the mission statement can serve as a compass throughout the year, a reference or guide for the group’s development and issue work over time.
- Each week, display core concepts, group rules/norms, and mission statement. This is good strategy for reinforcing the purpose of Clear Vision as well as the specific reasons for why your group has come together.
- Choose a team name associated with your chosen issue. This can foster a group identity.

Other tips for forming strong action groups are in the Appendix.

Issue Development

Issue development is about turning issues into action. From the start, coaches need specific tools for working with the group to transform their ideas about the issue they have chosen into tangible work plans and action steps. When it comes to issue development, the greatest challenge for coaches is to facilitate a process where team member’s focus in on the central issue and reasonable, doable action steps for working on that issue.

Issue development depends on knowing about the concepts of issues, problems, and actions.

Issue: matters of public concern—good and bad—that affect your neighborhood, community, state, society
Problem: negative consequences related to issue
Action Plan: Planned strategy/events designed to positively impact the problems we identify
Power: Ability to act; when it comes to making change it is the ability to act to make a difference—all people have power, especially when people work together!

Teams will often struggle with defining the issue, problem, and project or action plan. Generally this struggle is related to not having enough information and understanding of the issues as possible. Teams must understand the who, what, where, when, why and how of an issue; and they must understand it from a variety of perspectives. To gain this understanding takes time and effort and it is not a linear process. Moreover, issue development is an ongoing process and it takes place at all different stages of the Clear Vision process. Some criteria for the initial discussions that coaches can use include the following questions:

1. Does the issue impact the greater public?
2. Is there a potential for public work that will address the issue?
3. In what ways is the issue of concern to the group members? What are their self-interests in regard to the issue?
4. Are there available ways, people, and places to do research regarding the issue?

Defining the Project
Once your team has decided on an issue and a project, a project charter can help the team clarify their purposes and goals. This is a public display of the group’s goals and it will help to keep the whole team accountable and serve as a gauge to measure the group’s progress. See the appendix for more a Project Charter template.

Taking Public Action
Taking public action begins with developing an Action Plan and time line that in sets out a long term course plan for what team intends to accomplish by when. Creating an action plan will help the team organize their work and help them devise strategies. Action plans should include tasks, strategies, assignment of responsibility, potential barriers, possible alternative courses of action, and plans for public sharing of work upon completion or the end your time together. Action plans need to be realistic given the time that the team will be working together. Coaches can ask the work group members if the project is workable and winnable within the allotted frame. A template for an action plan is in the Appendix.

Action plans should be referred to at every meeting as they will need to be changed as new developments or problems arise.
Action plans help to assure accountability throughout your project as it places specific tasks that need to be done and assigns responsibility for each task. This puts the work of the group and the individual team members firmly in the public arena so that everyone can hold each other accountable for the work group progress.

Accountability is one of the most difficult challenges faced by coaches—how to get everyone to do the work they have agreed to do. Some suggestions for motivating work groups include:

- Establish clear expectations—have everyone write down their task or assignment
- Check in at the start of meetings to celebrate completed assignments as well as problem solve around those assignments that need not get done
- Hold members accountable for work not done, ask the group to consider what should be done if work is not completed, stress group accountability
- Contact work group members between meetings with gentle reminders—phone call, email, etc.
- Check off the work on the action plan timeline to reinforce the sense of completion
- Use the mission statement or Project Charter to remind the group of the commitment that everyone made to the project
- Have members evaluate their work as part of the check-in
- Celebrate spontaneously when work gets done and members are accountable

**Celebration**

Celebration in the Clear Vision Process is not something that only occurs at the end of the work, but it may also occur at important points along the way. For example, a working group that has been struggling to get past a seemingly insurmountable obstacle and finally finds a way to move forward would be an occasion for a celebration. Another example might be when a working group decides to take a little break from the project to lift their spirits and give the group a shot in the arm as motivation to continue to trudge ahead.

People of all ages respond to food or fun activities. Coaches can add to the rewarding atmosphere with verbal praise for mini-successes of the group members.

A time will come when the team will want to hold a final celebration. Coaches can involve the team by asking them to plan the event and it is a great opportunity to ask everyone to participate in some way.

Discuss who should attend the party, and remember that this is a time to showcase your project to the public. This is the time to acknowledge and reward the process and products of the work achieved by the working group. Public work should be celebrated and be made known, it should engage the community and reinforce civic action.
Appendices

Appendix A: Ten Tips for Building Strong Action Teams
Appendix B: Bob’s Rules of Order
Appendix C: Twenty Tips for Effective Meetings
Appendix D: Twenty Tips for Leaders or Coaches
Appendix E: What are Root Causes?
Appendix F: Project Charter
Appendix G: Action Plan
Appendix A: Ten Tips for building strong and engaged action teams

by Valeriano Ramos

March 22, 2012 | East Hartford, Connecticut

Promoting team pride, hosting regular meetings with team leaders, and fostering a creative environment are some ways to build strong and engaged action teams.

One of the toughest challenges community coalitions face is building strong and engaged action teams. The action forum sets the broad framework for achieving specific goals, but does not always address key elements of sustainable and effective action. Action teams may have a general sense of goals and tasks, but it is often the case that these groups of dedicated individuals could benefit from additional support for implementing action ideas. An "Action Oversight Group" can be a resource for action teams and can help them stay on track.

These are some tips I have learned over the years in my work with parent leadership groups, community outreach and organizing groups, and civic engagement leadership teams that can help groups make progress on action ideas:

1. **Set clear expectations for each action team**: what needs to happen, by when, and who is responsible. If people know what they’re expected to do and by when, they are better able to develop a roadmap for achieving specific tasks and goals. Always reaffirm how the work relates to the larger vision and strategic goals set during the dialogues and action forum. This allows the team to continue building commitment and engagement.

2. **Identify two leaders per team.** Co-chairs can share the responsibility of keeping the action team on course and moving. These individuals should be chosen for what they bring to the team, such as communication skills, credibility with others, knowledge of the community, and the ability to delegate. The co-chairs should focus on coordinating the team rather than taking on action tasks, although this can vary.

3. **Delegate, delegate, delegate.** You can’t do everything yourself - everyone on the team should contribute to the work of the group. Delegate based on the skill set, interest, and experience of each team member. For example, don’t give someone the task of contacting a
newspaper about a story if that person has never dealt with news media. To build skills in
the team, you might co-delegate to people whose competencies complement each other.

4. **Foster a creative, innovative environment.** Welcome new ideas and ways of doing
things. Micromanaging can often get in the way of encouraging collective leadership and a
shared commitment to outcomes. Use the strength that comes from the diversity of
backgrounds, perspectives, and experience in your team to try new things if other things
have not worked. Creativity is the door to possibilities.

5. **Continue recruiting volunteers.** Even if people were not involved in the initial dialogue-to-
change program, they may be interested in participating in an action team. Allowing new
people to join brings in new energy, a new network, greater inclusion, and a stronger sense
of ownership of the effort. Be sure to bring new members up to date so they can
participate fully. Your vision should always have room for new ideas and ways of reaching for
established goals without losing focus.

6. **Promote team pride.** Build a team image that celebrates your group’s commitment, vision,
and achievements by creating a motto, song, banner, or logo that captures what you’re
striving for. Also, recognize everyone’s work and accomplishments.

7. **Keep in touch.** Keep everyone informed through regular emails, calls, or meetings to assure
everyone that progress is being made. Keep track of the work being done by creating a
timeframe of key objectives and progress on them. Action team should meet regularly, but
sometimes conference calls and emails can work, especially for those who cannot attend
every meeting.

8. **Host regular meetings with all team leaders.** When team leaders come together, they can
assess their progress and address challenges collectively. This builds team spirit and
“collective leadership” that keeps everyone engaged. It also helps people draw on the
experience and expertise of others, so that the team is working from a position of shared
strength. It cements a common sense of purpose and commitment to a common vision.

9. **Connect the teams to resources.** Be prepared to provide information, contacts, and
resources to your team. Come to meetings prepared to address challenges and concerns. For
example, if you notice that there is a need for certain types of leadership skills, contact
voluntary action centers, university extension offices, or other groups that can
provide expertise, coaching, and resources on building these important team assets.

10. **Celebrate progress.** Keep the work of the team in the public eye by engaging media and
communicators who will share successes with the community. Be sure to connect your
community projects to the national movement to strengthen democracy and promote social
equity.
Appendix B: BOB’S RULES OF ORDER

For most organizations in which people share a sense of trust and a common vision, these simple rules are enough to run meetings in a friendly yet efficient manner—without the need for using hundreds of specific and sometimes obscure rules of parliamentary procedure.

1. To speak at the meeting, a person must be recognized by the chair. Only one person can be recognized at a time.
2. A main motion must be made and seconded before discussion can begin on any proposal for action.
3. Only three things can happen to a main motion: it may be amended, tables, or either adopted or rejected.
   a. An amendment can be debated, amended itself, and finally adopted or rejected by a majority vote of those voting. If it is adopted, it becomes part of the main motion. If it is rejected, the discussion returns to consideration of the main motion.
   b. A motion to table requires a majority vote of those voting. If a main motion is tabled, it cannot be brought up again at that meeting.
   c. The main motion (as amended) can be adopted or rejected by a majority of those voting. Once the main motion has been voted upon, there can be no further discussion of it.
4. After sufficient discussion has taken place on an amendment or a main motion, anyone can “call the question”—i.e., move to end debate and proceed immediately to vote. This can be done informally or formally.
   a. If the question is called informally, the chair asks if everyone is ready to vote. If there is no objection, an immediate vote is taken, with no more debate allowed.
   b. If someone objects to ending the debate, then formally an immediate vote with no discussion allowed is taken. If two-thirds of those voting wish to end debate, then no more discussion is allowed and an immediate vote on the motion is taken. If less than two-thirds vote to end debate, then discussion continues until someone else “calls the question.”

Under “Bob’s Rules of Order,” all other questions regarding the running of a meeting should be decided by the chair on the basis of … common sense!

If someone tries to speak out of turn or disrupt the meeting in any way, the chair can rule that person “out of order.”

If anyone objects to any decision by the chair, that person can “challenge the ruling of the chair.” When this occurs, each voting participant—including the chairperson—can speak to the challenge once and for only one minute. Then debate is ended and a vote is taken immediately to either uphold or reject the decision of the chair. If the majority of those voting uphold the ruling of the chair then the meeting proceeds. If the majority vote to reject the ruling of the chair, then the chair must announce a different decision, which can also be challenged if it is not acceptable.

(From National Alliance of HUD Tenants website, http://www.saveourhomes.org/tenants/bobsroo.php)
Appendix C: Twenty Tips for Effective Meetings

A focus of Clear Vision civic engagement and empowerment is bringing people together to solve common problems. Much of this work is done through meetings. Successful work groups and organizations conduct effective meetings: meetings that both produce results in accomplishing important objectives, and build the capacities of citizens to work together successfully as a group.

1. Organize meeting logistics.
2. Distribute an agenda before the meeting.
3. Don’t over-crowd the agenda with too many items.
4. Start and end on time.
5. Open with member check-in.
6. Establish and review ground rules.
7. Assign administrative tasks and responsibilities as the meeting progresses, and record the assignments in the minutes or meeting notes.
8. Present financial information with written copies for everyone present.
9. Keep information items brief and relevant.
10. Keep committee reports brief.
11. Conclude committee reports with a recommendation expressed in a clearly stated proposal.
12. Use visual aids.
13. State ideas positively and show their relation to the overall issue.
14. Foster cooperation, not conflict.
15. Discuss decision items when most group members are present.
16. Know the limits of the group’s decision-making authority.
17. Encourage everyone to participate.
18. Summarize decisions and assign action items.
19. Conduct public evaluation at the close of each meeting.
20. Distribute meeting notes or minutes promptly.
Appendix D: Twenty Tips for Leaders

1. Listen until you understand and can repeat a neighbor's point of view to their satisfaction before you share your own opinion.
2. Express your ideas plainly and give clear messages.
3. Build trust by being trustworthy and dependable with others.
4. Encourage people to believe in themselves by helping them work with others to change their neighborhoods.
5. Learn 20 different ways to say thank you, and use them.
6. Don't get discouraged too often or too long.
7. Ask questions to get people to think, speak, and act for themselves.
8. Be open to new ideas, especially those of others.
10. Set reasonable limits on what you do--don't try to do everything for people, or you will never be able to help them do things for themselves.
11. Act with courage--take risks, face criticism, and keep going when it's hard.
12. Have a sense of humor.
13. Ask others for help--recruit and delegate.
14. Learn how to write an agenda and run a meeting.
15. Make sure you read the group’s materials (minutes, newsletter, and emails).
16. Involve people in finding a solution to the problems they bring to you.
17. Get involved in at least one "fun" event for your group every year.
18. Learn the names of all the people in your group.
19. Recruit five new members to the group each year.
20. Learn how your group handles its funds.

Appendix E: What are Root Causes?

Often there are several root causes for an issue, or a chain of root causes that have grown from one another. By identifying and addressing root causes we can create lasting, systemic change; rather than addressing the surface level symptoms of the issue which only offers a temporary “band aid” solution. In addressing root causes we move from a community that reacts to problems, to a community that prevents and solves problems before they escalate, or spiral out of control.

How to identify root causes?

We identify root causes to community problems by doing community-based research, one-to-ones and critically learning about issues.

A conceptual way to understand this process is the “5 Whys” technique, which is simply asking the question “Why?” successively five or more times to get at the deeper causes of each answer given. This process should be repeated and asked of various people and stakeholders to understand what a community believes are the root causes to a problem they are facing. The conceptual objective is to keep questioning why each thing happens, instead of assuming that the first cause which comes to mind is the root cause.

Example Issue: Low graduation rates as 5 Whys...

<table>
<thead>
<tr>
<th>Why?</th>
<th>Students don’t value their school experience.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why?</td>
<td>Because they don’t feel the adults care and all they do is punish students.</td>
</tr>
<tr>
<td>Why?</td>
<td>Because adults are trying to keep the school safe through rules and consequences.</td>
</tr>
<tr>
<td>Why?</td>
<td>Because adults are responsible for student safety.</td>
</tr>
<tr>
<td>Why?</td>
<td>Because they care about students.</td>
</tr>
</tbody>
</table>

From this example, we find that one root cause is that there seems to be a miscommunication between students and adults around their actions and the meaning behind their actions. We might start to address this issue by thinking of alternative actions and communication that could support a safe school environment and show more respect for students.
Appendix F: Project Charter

Once your action team has identified a project to address the problem you have selected, you should develop a project charter to help clarify your purposes and goals. A project charter serves as a mission statement for your project and will help hold your team accountable in measuring its progress. The project charter should clearly state what your team intends to do. A succinct and well-written charter can serve as an important public outreach tool in explaining your project and recruiting additional people.

To develop your project charter, work with your team to:

- State clearly what general issue interests you.
- State clearly what problem you want to solve, and why you care?
- State clearly what you want to accomplish with your project. How will that help solve the problem?
- State clearly how you plan to solve the problem. What are you going to do?

Complete the following to develop your statement:

**PROJECT CHARTER STATEMENT**

We, the ___________________ Clear Vision Action Team believe that ________________________________
(team name)

______________________________ is a serious problem in the ____________community, contributing to ________________________________________________________________________.

We propose to: ____________________________________________

__________________________________________________________

We believe that this will help solve the problem by:


__________________________________________________________

Our measure(s) of success will be:


__________________________________________________________


In order to implement this solution we intend to use the Clear Vision tools of: *Values House Meetings, One-to-One Conversations, Power-Mapping, Public Evaluation, and Research Conversations*, to engage our community for the common good. See *Action Plan* for project details.
Appendix G: Action Plan Creating an Action Plan

An action plan is a written description of your team’s step-by-step strategies for doing your project and provides the basis for work for the project. It’s helpful for teams to write their action plan and time-lines on a flip chart and post it on the wall for every meeting. This helps the team be mindful of their accomplishments and what needs to be done.

In creating your action plan, keep seven things in mind:

1. Your team’s overarching goals and project charter;
2. How much time you have to work together;
3. The information, resources, and power you need to meet these goals;
4. The potential barriers to meeting your goals, and possible alternative courses of action;
5. The project’s intermediate goals and the order in which you would go about your work;
6. How you will make your work public;
7. How you will evaluate the public impact of your work.

Planning Process

1. Review your evolving power map:
   a. Which stakeholders do you need to talk to or work with to accomplish your goals?
   b. Who are the primary stakeholders that have influence on your project?
   c. Who are possible allies? Barriers? Gatekeepers? Who can you influence?
   d. What information, power, or resources do you need to convince possible gatekeepers to let you move forward?

2. Identify your main project themes or intermediate goals.
   a. What are the large things or intermediate goals you need to do to complete your project?
   b. What do you want to accomplish by the end of the project?
   c. What do you need to do to finish the project?
   d. Which goals are most important to completing your project?

3. Make a draft list of goals in sequential order.
   a. What things need to be done first?
   b. What is the logical way to order your goals so you can complete your project?
   c. What can you work on concurrently?

4. Brainstorm a big list of the possible things that need to be done for each goal.
5. **Agree on specific objectives for each goal.**
   a. What ideas on the brainstorm list are more realistic?
   b. Keep in mind that a good objective is “**SMART**”
      Specific: it addresses the matter specifically.
      Measurable: it can be measured to see whether it has been achieved.
      Achievable: it is within the means/capacity of your group.
      Realistic: it is practical and can be accomplished within a reasonable time frame.
      Time-bound: the time period for reaching it is clearly specified.

6. **Set tasks for each objective.**
   a. What are all the possible tasks for each objective?
   b. What is the priority order for the tasks?
   c. What is the logical progression of the tasks you need to accomplish?

7. **Create timelines.**
   a. What timelines should be set for your objectives and tasks? Weekly? Monthly?
   b. What is realistic to get accomplished within a specific time frame?
   c. What are important deadlines for each step?

8. **Establish accountability.**
   a. What do you need to do to make sure the work gets done on time?
   b. Who is responsible for each task?
   c. Does your team want to have an “accountability checker” to check in with those who are doing the task?

9. **Review and revise your plan.**

10. **Plan celebrations.**
**Action Plan Template**

- Name of Project, Date and Update dates, Project charter statement
- List of goals, objectives, tasks, responsibility, timeline, and measures of success

<table>
<thead>
<tr>
<th>(Name of Project)</th>
<th>Action Plan</th>
<th>Date/Update:</th>
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**Project Charter Statement:**

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<tr>
<th>Theme/Intermediate Goal</th>
<th>Objectives</th>
<th>Tasks</th>
<th>Responsibility</th>
<th>Timeline</th>
<th>Measures of Success</th>
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