



New Mexico First Facilitation for Success Workshop

**PREWORK
READING**

➤ Albuquerque, NM

CONVENER

New Mexico First



NEW MEXICO FIRST

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CONTENTS

OVERVIEW	4
What is the Town Hall Process?	4
Why is this Important?	5
How is the Topic Selected?	5
How are Participants Recruited?	5
How are the Questions Developed?	5
LEADERSHIP	6
What are the Roles Involved?	6
How are Leaders Prepared for Their Roles?	6
What are Guidelines for Discussion Leaders and Recorders?	7
What is the Job of the Implementation Team?	8
CONCLUSION	9

OVERVIEW

New Mexico First is a nonprofit, nonpartisan organization that engages New Mexicans in public policy, primarily by holding consensus-driven town halls on topics of public interest. Typically, these town halls focus on a specific policy issue such as water, energy, education, or healthcare. They produce a list of concrete, actionable recommendations for policymakers.

What is the Town Hall Process?

New Mexico First hosts a statewide town hall every other year. Using a proven consensus-building process, the event brings together people from all walks of life to identify practical solutions to the state's toughest problems.

- Prior to the town hall, those attending read a background report that provides a common understanding of the topic.
- At the town hall, participants are divided into small groups. Each small group is led by a discussion leader and recorder and meets for two full days to address a common set of questions.
- Each small group works to come to agreement on initial recommendations which are shared with the other groups.
- Each small group has the opportunity to carefully review and respond to the recommendations by proposing amendments. These amendments often clarify and strengthen the initial recommendations.
- Finally, the small groups come together and deliberate in a plenary session on the proposed amendments. They have completed their work when they reach consensus on the amendments and the recommendations are considered final.

TOWN HALL PROCESS

Step 1: LEARN THE ISSUES

Background Report

Review report before attending the town hall.



Context Setting and Shared Learning

Listen to guest speakers and ask questions.



Step 2: EXPLORE POSSIBILITIES

Small Group Discussions

Consider opportunities and challenges.



Step 3: DEVELOP COMMON GROUND

Draft Recommendations

Create recommendations that pertain to the topic.



Amend Recommendations

Refine recommendations for consideration by full group.



Agree on Final Recommendations

Reach consensus on final recommendations in the full group.



Step 4: ADVANCE CHANGE

Communicate and Implement Recommendations

A final report is sent to all stakeholders and the Implementation Team works to advance the recommendations agreed to by town hall participants.

- A master recorder is responsible for creating a final report which lists the final recommendations and provides a context for understanding the agreements of the town hall participants.

- The final report is distributed throughout the state to all town hall participants, other concerned citizen groups, state libraries, media, the federal delegation, all legislators, key administrators, and other elected officials throughout the state.
- An implementation team meets following the event to strategize on how the recommendations can be accomplished and how the citizens of New Mexico can be informed about the recommendations.

New Mexico First advocates the adoption of town hall recommendations to legislative and executive officials. Town hall participants, who volunteer to be members of the implementation team, find opportunities to educate citizens in local community settings or through the media.

New Mexico First also seeks to educate a broad spectrum of New Mexico citizens through the distribution of town hall reports and through presentations to civic and community groups.

Why is this Important?

United States Senators Pete V. Domenici and Jeff Bingaman founded **New Mexico First** in 1986 to be a forum for discussion of issues and a source of education for New Mexico citizens.

New Mexico First advances New Mexico by carrying out the vision of the Senators – by building *citizenship* – and it also seeks to effect *change*.

The town hall format is a civil, democratic, consensus process that enables a diverse group of New Mexicans to reach consensus on a topic of concern to them and to the rest of the state. This results in engaged, educated citizens and, often, policy that advances New Mexico.

How is the Topic Selected?

The **New Mexico First** members, staff, and Board of Directors are active, involved citizens. The Board of Directors discusses potential topics and selects a topic based on statewide impact, timeliness, and divergence of subject matter. The topic selected is suitable for open, public discussions and is not the sole interest of an interest group, industry, or political party.

How are Participants Recruited?

Participants are recruited from the population at large. Typically, one-third of the 120 participants at a town hall may be considered “experts” in the subject matter; the other two-thirds are citizens from all walks of life who have an interest in the topic.

There is no requirement that those who come to the town hall have a tradition of working together on the topic. Participants with differing opinions are more likely to have interesting discussions that cover many aspects of the problem. The topic of a town hall calls for balance in the participants.

How are the Questions Developed?

The small group discussions are guided by a set of questions specifically designed to develop consensus on the public policy issue being discussed. The development of good questions is a key to the success of the town hall. A set of questions may be proposed by the authors of the background report. The staff determines how the questions will be used according to the agenda and the questions are refined during the orientation session for the town hall leadership team.

LEADERSHIP

What are the Roles Involved?

There are a number of roles performed prior to and during the course of a town hall.

- **Research Committee:** A team of topic experts work with the authors of the background report to outline and prepare the report. Some members may also participate in the town hall as a keynote or panel presenter or as a participant or observer.
- **Speakers:** Several keynote speakers and members of a panel discussion provide a context for the topic and prepare participants for their deliberations.
- **Participants:** Most people at town halls are participants. They take part in the discussions, explore ideas, and negotiate the final recommendations.
- **Observers:** Observers watch the participants work, but do not take part in any of the discussions themselves.
- **Media:** The media may be present during the town hall and are allowed to quote the proceedings and the participants, but they may not take part in the discussions.
- **Leadership Team:**
 - Discussion leaders facilitate consensus in the small group discussions.
 - Recorders take notes and draft the consensus recommendations in the small group discussions.
 - The plenary chair moderates the full group sessions where the initial recommendations are shared, amendments are considered, and the final recommendations are determined.

- The master recorder combines the work of the full group into themes for the final report.
- **Staff:** Members from the New Mexico First staff are present throughout the town hall to assist with any matters that may come up or provide information or materials needed by participants or members of the leadership team. The staff also observes the small group discussions and assists the master recorder and plenary chair.

How are Leaders Prepared for Their Roles?

The leadership team – discussion leaders, recorders, the master recorder, and the plenary chair – participate in an orientation prior to a town hall, so that they can clearly understand their roles and those of the participants and begin working as a team. Even experienced facilitators participate in the orientation session.

Team members get an overview of **New Mexico First** and the town hall process. They receive a guide that outlines the process, discussion questions, and worksheets to be used. They also participate in a detailed, step-by-step walkthrough of the tasks required of discussion leaders and recorders.

The members of the leadership team have specific roles that are interrelated and must be well coordinated during a town hall. One of the major goals of the leadership team orientation is to build a team of all of the team members so they can rely on one another for support during the town hall, bounce questions and difficult situations off one another, etc.

What are Guidelines for Discussion Leaders and Recorders?

The roles of the discussion leader and recorder are critical to a successful outcome because so much has to be accomplished within a well-defined, limited time frame and the knowledge of the participants about the subject matter is likely to be uneven. It is the discussion leader's responsibility to ensure that the questions are answered in the time provided and that all voices in the room are heard. It is the recorder's role to ensure the answers to the questions are accurately recorded and the voice of the participants is reflected. Both should take comfort in knowing that a group of knowledgeable, motivated participants will arrive at reasonable solutions to tough problems.

Do's and Don'ts for a Successful Team

The following are tips that have proved to be successful.

The discussion leader does...

- Develop a "game plan." Although guidance is given, prior to the start of the discussion, the discussion leader and recorder should confer on what is the best approach for addressing each question. Consideration should be given to whether each question calls for the group to generate, develop, or select between ideas.
- Create an environment where participants feel safe enough to say whatever they believe is appropriate to say.
- Move the group through the questions.
- Reflect the group's work, not his/her own beliefs.

The recorder does...

- Capture the preferences of the group, by using their language and by helping them articulate their agreement (consensus).

- Submit the group's answers and recommendations to the master recorder at agreed-upon intervals.

The discussion leader and recorder do not...

- Contribute their own ideas about the questions.
- Act as a participant in the discussions.
- Become the focus of the discussion.
- Influence the group toward an outcome.
- Take criticism personally.

Consensus Definition

A key responsibility of the discussion leader and recorder is to ensure their group reaches consensus. Consensus, a collective agreement, is reached by a process that makes full use of available resources and resolves conflicts creatively. Complete unanimity is not the goal – it is rarely achieved. But each individual should be able to accept the group's decision on the basis of logic and feasibility. When all group members feel this way, consensus has been reached, and all the recommendations may be entered as the group's decision.

New Mexico First's definition of consensus for small group discussions:

- When each participant in the group can say:
 - I believe you understand my point of view.
 - I believe I understand your point of view.
 - Whether or not I agree with this alternative or prefer this decision, I support it because it was arrived at openly and fairly and is the best alternative for us at this time.

New Mexico First's definition of consensus for the plenary session:

- During the plenary session, there is a need to be more flexible. So, a "sense of the group" rule

applies with at least a 90% agreement before a recommendation is considered final.

- If there is less than 90% agreement on a recommendation, the Plenary Chair will ask for friendly suggestions to improve upon the recommendation. If agreement cannot be arrived at quickly, representatives who drafted the recommendation will confer with representatives who want to amend it to see if a compromise can be determined. If a compromise can be reached, the full group of participants will have the opportunity to review the revised recommendation to see if 90% agreement can be achieved.

Tips for Developing Consensus

During the **small group discussions**, there are two techniques we have seen work and that has helped us protect the discussion leader as well as New Mexico First:

- Discussion leader establishes a supportive context for the small group discussions at the very beginning by letting participants know that if an idea, opinion, suggestion, or recommendation does not move forward, it does not mean anything is wrong with the idea, etc. It just means it doesn't yet reflect common ground.
- Discussion leader asks for a "thumbs up" sign as a visual signal that everyone is saying, "I may not love it, but I can live with it." In this way, it is more unlikely that someone will come forward later and say, "My voice was not heard." If one or more participant cannot give a "thumbs up" sign, ask the participant to suggest

how the idea needs to be changed to make a "thumbs up" possible.

What is the Job of the Implementation Team?

The purpose of the implementation team is to take the town hall recommendations and present them to policy-makers, decision-makers, and opinion leaders who are in a position to enact or influence the enactment of the recommended policy change. It is also the responsibility of the implementation team to get the word out to civic and community groups and to educate the citizens of New Mexico about the town hall recommendations.

At the first meeting, the implementation team is asked to begin developing a plan on how they wish to communicate the work of the town hall to New Mexico citizens and to develop long term and short term strategies for accomplishing the recommendations of the town hall. Over the course of a few meetings, they identify their communication plan and message, their key audiences, and a plan of action to get the work done.

The implementation team may be working for 12-18 months after the completion of the town hall, depending on the complexity of the recommendations. The implementation team delivers periodic progress reports to the Board of Directors and President of New Mexico First.

CONCLUSION

New Mexico is one of the most diverse of the United States: historically, culturally, geographically, and politically. The town hall model engages these diverse perspectives through a consensus building process whereby participants come together to deliberate and come to consensus on a topic of critical importance to New Mexico. Through careful listening and by consideration of differing perspectives, participants learn to find common ground and realize a deeper understanding of issues.

These skills, in addition to a more in-depth knowledge of the specific issue, allow average citizens to return to their respective communities and speak more knowledgeably and confidently about the issue. The process encourages them to share the town hall recommendations with business, community, and civic groups in their local community. The participants develop a network with other New Mexico members who can support them as they communicate in their local communities.

In a state like New Mexico there is no stronger voice in getting a position communicated to a legislator than by one of the legislator's own constituents. Most New Mexico citizens have access to their local legislators through faith, civic, or business connections. If a legislator hears recommendations from a fellow citizen in his area, he or she is much more likely to address those concerns. These same town hall participants have new confidence in communicating with their city or county council members and other elected officials.

Many participants become so active in the specific "issue" after a town hall that they become the local "expert" and are looked to for input and assistance. Citizenship is developed, encouraged, and affirmed during the town hall process and is likely to be sustained long after the town hall itself.