Clear Vision Eau Claire
Toolkit

A collection of core concepts, core strategies, and core practices organized by a community engagement framework and process. The Clear Vision model has been influenced in major ways by the Community Visioning and Strategic Planning approach as developed by the National Civic League and the action phase has been informed by the Public Achievement model as advanced by the Sabo Center for Democracy and Citizenship, Augsburg College.

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Introduction to Clear Vision Eau Claire

In June 2007 the City of 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, with a mission "*To engage our community for the common good*". It was recognized 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 Eau Claire** expanded the community capacity for effective participatory citizenship and collaborative institutional decision-making by government, business and civil society.

Working with the National Civic League and engaging the community in an intensive community visioning and strategic planning process, the July 2008 Clear Vision Community Report and Plan identified 125 action strategies for six long-term community key performance areas:

Common to all the key performance areas are the twin concepts of building civic problem-solving skills and embedding collaboration among community governments, organizations, and institutions. The Clear Vision Eau Claire Board of Directors provides leadership for these efforts. Its purpose is: "*To convene, nurture and support diverse groups of community members for civic work that addresses the needs identified in the Clear Vision Plan*". Its aspiration is to help Clear Vision become an international model for 21st century civic action and local democracy.

Using the Public Achievement model from the Center for Democracy and Citizenship, Clear Vision has convened and trained diverse citizen groups to address community needs such as: jobs for the underemployed, environmental sustainability, education partnerships, performing art facilities, regional transit, and treatment transition options instead of incarceration.

In addition, Clear Vision Eau Claire has developed an approach to community engagement that can also be applied to a single, community-identified issue. In the fall of 2016 and continuing through the end of 2018, this variation was piloted by the Clear Vision Eau Claire Poverty Summit and resulting Action Teams.

These approaches to community engagement are outlined in the following sections, beginning with core concepts. The actual skills of community engagement are described in the Core Skills section of this toolkit. The final section of the toolkit gives a brief summary of how the overall Clear Vision Process is organized and sequenced, from bringing the community together to identifying the issues, to forming action teams to develop action plans, to creating results that contribute to the common good of the community.

Core Concepts

The Concept and Philosophy of Public Work

The Sabo Center for Democracy and Citizenship (SCDC) 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 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 SCDC 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 *politicos* 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.

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Public Work: Key Terms

Public Work	The visible effort of ordinary citizens who cooperatively produce and sustain things of lasting importance in our communities, nation or world.
Politics	The practice of power and governance; the art and science of how public decisions are made
Citizenship	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.
Democracy	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.
Freedom (freedom from) (freedom to)	The absence of undue restraint and coercion. The liberation of our talents and energy for collective creation.
Public	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.
(Self) Interests	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.
Diversity	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.
Power	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.
Relationships	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.
Free Spaces	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.
Accountability/ Responsibility	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

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| self, group, site, and community. |

Self-Interest: Self Among Others

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Self-interests are shaped by your motivations, preferences, needs, background, hopes, and dreams. Self-interests cover a broad range of wants, preferences, and choices that can be privately oriented, publicly oriented, or oriented toward moral standards. **Self-interests become the reasons why you take action and stay engaged in public life.**

To many people, self-interest seems similar to selfishness, self-centeredness, a lack of regard for others, egotistical behavior, greed, etc.

However, the concept of self-interest is relational. In its definition, it implies a *self* and an *other*. The word "interest" comes from two Latin words, *inter* and *esse*. Combined, these words mean "to be among." Therefore, **self-interest in its root definition means, "self among others."**

<u>There are three ways of acting:</u>

Selfishly	Out of Self-Interest	Selflessly
▪ Disregards others ▪ Greedy ▪ Jealous ▪ Small minded ▪ Ego centric	▪ Thinks of self in relationship to others	▪ Only thinks of others ▪ Humble ▪ Do-gooder ▪ Victim ▪ Martyr

It is easy to see the deficiency of people acting selfishly; but people are often confused about the "selfless types." People who act selflessly in a public relationship may have difficulty negotiating conflicts or standing up for their beliefs. Selfless people can be hard to work with because they may stretch themselves too thin trying to appease everyone instead of focusing on something important to them. Acting out of self-interest is the only true way of relating to another person because it respects multiple sides of the relationship.

To know your self-interest, to declare your self-interest, and to act on your self-interest is the act of political courage.

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Power: The Capacity to Act

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To begin the journey to be effective in the public arena we must begin with an analysis of a key word in our language, *power*. We must examine our feelings and attitudes toward it, our definition of it and its source.

Feelings and Attitudes about Power

In our psyche, we are ambiguous about wielding power. We are given mixed messages about power. It is bad and to be avoided: "power corrupts". Powerlessness, selflessness, and meekness seem to be the virtues to which we should aspire. Therefore, politicians like to call themselves public *servants*.

On the other hand, power is said to be good: the power of the allies in World War II overcame fascism.

What are your feelings about power and why?

Definition of the word "Power"

Power is the ability to act, to effect change.

Power must be viewed as relational. Power is not a static property or possession that someone can have and then exercise over some else but is always a relation that is dynamic, interactive, and multidirectional.

Do you want power? Why or why not?

Sources of Power in the Public Arena

Organized People and Organized Money

It is with organized people that unions build and exercise power, politicians get elected and social change takes place. With organized money (money raised and strategically spent), development is created, and elections are influenced.

The media, issues, speeches, and ideas are the tools used to organize people. Understanding one's self-interest and the self-interest of others is key to this process.

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

Examples and Distinction: Public and Private Relationships

Public Relationships-Examples	Private Relationships-Examples
Fellow Workers	Partner/Lover/Spouse
Boss/Employee	Children
Pastor/Doctor/Lawyer	Parents
Car Salesman/Politician	Siblings
Banker/Teacher	Very Close Friends
Public Relationships--Distinctions	**Private Relationships—Distinctions**
We need/seek respect	We seek love
Formal/Contractual	Casual/Intimate
Overt/Above Board/Objective	Covert/Indirect/Subjective
Self-Interest/Quid Pro Quo	Blood/Kinship/Feelings
Temporary	Permanent
Focused/With an Agenda/Planned	Spontaneous
Diversity/Pluralism	Similarity/Homogeneity
Tension/Conflict/Agitation	Peace/Harmony
Power	Love
Accountability	Sacrifice/Self-giving

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.

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Core Practices

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.

Another tool that can be used with a group of people to identify individual and shared values is the Values List in the Appendix A. This is typically given in a forced choice format with the first instruction to have individuals circle their top 10 values. After the group has completed this, and without discussion, the next

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instruction is to circle their top 5 values, and finally their top 3 values. Afterwards a group discussion and tally can reveal both individual and shared values.

The World As It Is

An Exercise to Highlight the Influence of Power

The focus of this exercise is to highlight the challenge of operating effectively in the world as it is, while working toward the world as it should be. The world as it is was created by people or groups of people through complex negotiations of power. In order to create the world as it should be we too need to organize and negotiate power.
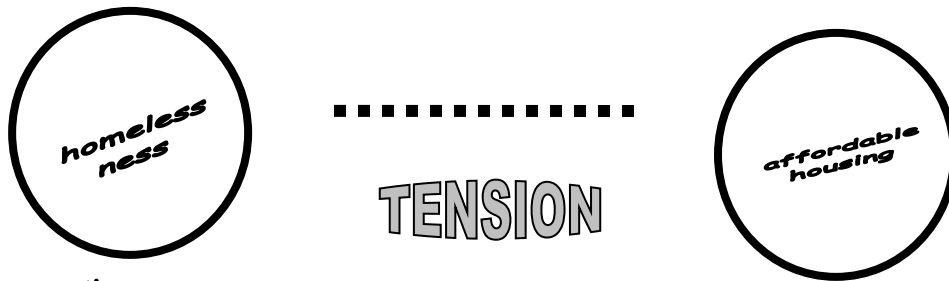

Create the following diagram on the board.

The World as it is: **The World as it should be:**

TENSION
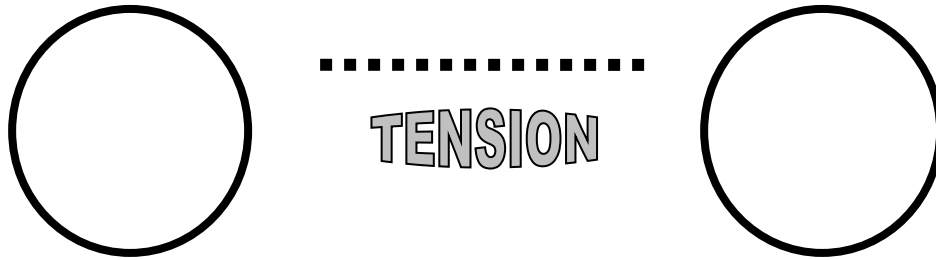
Have participants come to the board to write one concrete example of something in the "world as it is" circle and one example of what they desire in the "world as it should be circle" (e.g. homelessness - - - - affordable housing).

homelessness   TENSION   affordable housing

Discussion questions:

1) Why is there homelessness (or another example) in "the world as it is"?

2) What things in history might have contributed to this?

3) What could people do on this issue to move toward "the world as it should be"?

4) What systems need to change to improve this issue?

5) How can you change this issue?

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.

How to map: As you map, keep these in mind:

- Interests   What are the interests of the proposed stakeholders?
- Power   What power do the stakeholders have and what power is needed to accomplish our goals?
- Rules   What is the protocol to engage with various stakeholders?

Pre-mapping: Put your problem, issue or project goal in the middle of the paper and being to brainstorm all the people and organizations that may have a stake or power in relation to your topic. Write the names of people and organizations in spokes stemming from the issue.

Research: Create assignments for team members from the spokes to research the interests and power of stakeholders identified in your pre-map. Role play by yourselves first to prepare them to go into public. What questions do they need answered? With whom do they need to speak or be in relationship?

Re-mapping: After reporting back to the large group the information gathered during the research phase, revise your map accordingly. Add to and detract from your map as your group learns and work towards its goal.

Action Plan: Work with your group to determine next steps that will evolve into an action plan. Put names and dates down on the map to hold the group accountable to accomplishing its goals. Celebrate when tasks are achieved to keep the momentum strong.

Continue mapping: Research, re-mapping and revising the action plan are all part of a complete power mapping process.

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-one-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.

Tips and tools:

- **Be prepared**: It is best to set interviews up in advance, think about what you want to know and make the interview short (at least the initial one), no more than 30 minutes.

- **Keep it informal**: A one-on-one differs from a job interview, a survey, or an academic approach. You do not have a standardized set of questions-you go with the flow, looking for body language, sources of passion, personal histories. Don't take notes or use a recorder during the conversation.

- **Look for connections**: Ask questions to keep the conversation flowing. Look for connections and contrasts in experience between yourself and your interviewee, but resist launching into long stories about yourself. The other person should be doing most of the talking.

- **Ask direct questions**: Find out what is important to the other person. For instance, ask about her connections to her home, or how she came to her job. Find out about the public issues that make her angry or energized. "Why did you get involved in this group?" "Why do you care about this issue?" "What have you learned from this experience?"

- **Avoid asking yes and no questions**: They are too quick and you don't learn much. If you do ask them, follow up with "why?"

- **Listen well**: Build on what your interviewee has already said. This involves paying close attention. An interviewee who feels listened to is likely to talk more than someone who feels that their words are falling on deaf ears. The interviewer should not do more than 20% of the talking.

- **Be sure you understand**: Clarify what the talker is saying by restating what you've heard and asking if you've got it right.

- **Look for the energy for action**: If you can see that the person is fired up about a public problem, ask if she has ever taken action on it before and how. Find out if she would be interested in working with others to take further action. Plan a follow-up interview, if it would be useful.

- **Evaluate**: Afterward, think about the outcome of the interview. What worked? What can you do better next time? When you have time, make a few notes to file away for future reference.

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Project Charter

Action Team Projects

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:

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_____
_____
_____
_____
_____
_____
_____

_____
—.

We believe that this will help solve the problem by:

_____

_____
_____
_____
_____
_____
_____.

Our measure of success will be:

_____

_____
_____
_____
_____
_____
_____.

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

Root Causes and the 5 Whys

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…**

Why?   Students don't value their school experience.

Why?   Because they don't feel the adults care and all they do is punish students.

Why?   Because adults are trying to keep the school safe through rules and
             consequences.

Why?   Because adults are responsible for student safety.

Why?   Because they care about students.

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.

Action Plan Template

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.**
    a. What things need to be done first?
    b. What is the logical way to order your tasks so you can complete your goal?
    c. What can you work on concurrently?

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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)		**Action Plan**			Date/Update:
Project Charter:					
Theme/Intermediate Goal	**Objectives**	**Tasks**	**Responsibility**	**Timeline**	**Measures of Success**

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Public Evaluation

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.

Here are some sample evaluative questions:

- What did we set out to accomplish today? Did we complete that? Why or why not?
- What part of our strategy worked well and what didn't? How can we build on the successes and minimize the failures?
- What can we do differently? Are there any needed changes?
- What did I learn about civic problem-solving, myself, the community?
- What do we need to do next time?

It is also useful to evaluate how individuals and teams performed specific assignments - focusing the critique on the work, problem, event or goal (not the person's character). This type of formative evaluation not only reinforces accountability, but helps improve future work.

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 to 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.

Challenge the direction of the team's work and end goals by asking and recording questions such as:

- What is being done or created that has long lasting civic value, is it sustainable, do people know about it, and is it visible?
- Are we tapping new resources and making strong efforts to collaborate in new ways? Are we building new relationships?
- What civic skills and capacities are being developed both individually and for the team? How can they be improved?
- Is real change happening on an institutional level? Are we breaking down barriers?

Community Summit

The Clear Vision Process was developed as a way for communities to not only generate a vision for the future, but a way to move through complex problems and achieve goals that contribute to the common good. Generally, we have begun with a gathering or summit of citizens who have been recruited by a small group of people who have a significant engagement with the community and/or the issue being addressed and can identify those citizens who should be at the summit. We have called this group an Initiating Committee. The members are recruited for their knowledge and relational power with community members. They may or may not attend the summit.

A second organization team has the responsibility of supporting the action teams once the summit has concluded and the teams begin work in earnest on the issues and goals they have identified during the summit. We refer to this team as a Coordinating Team.

A sample list of responsibilities for each of these committees is in Appendix B, and C. A sample community summit outline is in Appendix D.

A key part of the action stage is the recruitment, selection and training of co-coaches, at least two for each action team. Co-Coaches are primarily in a group facilitation role as they plan meeting, develop agendas, and review action plans. A separate Coaches Manual has been developed that outlines the training of Co-Coaches. A job description for the coaches is in Appendix E and a sample of how action teams use the concepts and tools to identify, assess, and engage the issue is in Appendix F.

The Clear Vision Process has been strongly influenced and informed by resources from the National Civic League and the Sabo Center for Citizenship and Democracy. The National Civic League has published an excellent resource for convening and conducting community-wide visioning and strategic planning summits:

Public Achievement model as developed by the Sabo Center for Citizenship and Democracy: http://inside.augsburg.edu/publicachievement/

Community Visioning and Strategic Planning Handbook from the National Civic League: https://www.nationalcivicleague.org/resources/community-visioning-strategic-planning-handbook/

It is somewhat difficult to specify exactly how each action group goes about its problem-solving process, except to say that the core concepts and core practices are utilized in an ongoing and iterative manner. There is a model of the process for an action group in Appendix G called "Pulling It All Together: The Organizing Plan Worksheet."

The Clear Vision Toolkit and the Clear Vision Coaches Manual are not copyrighted and are freely available to interested communities. If communities have questions, they can contact Clear Vision Eau Claire through the website at **http://www.clearvisioneauclaire.org/.**

Appendix A: Values Checklist

Accomplishment	Flexibility	Patience
Accuracy	Focus	Peace
Authenticity	Forgiveness	Political
Balance	Freedom	Presence
Beauty	Friendship	Productivity
Boldness	Fun	Proof
Calm	Generosity	Public
Challenge	Gentleness	Relational
Clarity	Grace	Respect
Collaboration	Growth	Responsibility
Community	Happiness	Resourcefulness
Compassion	Harmony	Safety
Competitiveness	Health	Security
Camaraderie	Helpfulness	Selflessness
Confidence	Honesty	Self-Esteem
Connectedness	Honor	Service
Contentment	Humor	Simplicity
Cooperation	Idealism	Spirituality
Courage	Inclusion	Spontaneity
Creativity	Independence	Strength
Curiosity	Innovation	Tact
Data	Integrity	Thankfulness
Dedication	Intuition	Tolerance
Democracy	Joy	Tradition
Determination	Justice	Trust
Directness	Kindness	Truth
Discipline	Learning	Understanding
Discovery	Listening	Unity
Education	Logic	Visionary
Efficiency	Love	Vitality
Empowerment	Loyalty	Willingness
Enthusiasm	Morality	Wisdom
Environment	Non-partisan	Work
Equality	Open-mindedness	(others)
Equity	Optimism	_____
Ethics	Order	_____
Excellence	Participation	_____
Fairness	Partnership	_____
Faithfulness	Passion	_____

"Values are those things that we believe deeply,

defend passionately, and act upon regularly."

Appendix B: Initiating Committee Job Description

Initiating Committee Job Description

During Phase I of a summit process the Clear Vision Board will appoint an Initiating Committee of 10-15 members to complete a stakeholder analysis and identify strategies for stakeholder recruitment. The Initiating Committee should reflect the broad social and demographic diversity of the community. Major Initiating Committee tasks to be completed during Phase I include:

- **Stakeholder Analysis** - A critical task of the Initiating Committee will be to identify stakeholders who will develop the priority action plans. Stakeholders are people who have a committed interest in the future of the community, not simply as people in traditional leadership positions. The purpose of the Stakeholder Analysis is to identify and recruit 150-200 individuals who will serve as the core group for the engagement and public problem-solving process. The stakeholder group needs to be as diverse as possible and reflect critical assets, interests and perspectives regarding poverty in Eau Claire County.
- **Recruit non-traditional participants-**A critical element of the empowerment summit will be expanding stakeholder recruitment to include the participation of lower income and housing insecure stakeholders to speak directly to their self-interests and insights regarding the framing and analysis of issues and action alternatives. The Initiating Committee will identify specific strategies to recruit non-traditional participants.

The Initiating Committee will hold 3-4 meetings to complete a stakeholder analysis and the preliminary logistical planning. It is anticipated that a joint meeting will be held in the month prior to the start of a community summit with the Summit Coordinating Committee to review follow-up recruitment strategies for stakeholder participation.

Appendix C: Coordinating Committee Job Description

Description

The Coordinating Committee provides project oversight for the implementation of the Community Summit Action Team projects. This committee's work begins as the Community Summit sessions conclude. The Coordinating Committee Co-Chairs are appointed by and report to the Clear Vision Board of Directors. Coordinating Committee monthly meetings will be held, and primary responsibilities are listed below.
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Responsibilities

The work of the Coordinating Committee centers on the following:
Communication –
- Provide helpful and necessary communication to Action Team Co-Chairs and Action Teams.
- Ensure communication between teams occurs, as needed for support, consistency, and to avoid undesirable redundancies.
- Communicate regular updates to the Clear Vision Board of Directors.
- Communicate and promote the work of the Action Teams to community, media, etc.

Coordination –
Provide Clear Vision direction and oversight to the Community Summit Action Teams, including:
- Hold meetings with Action Team Co-Chairs to ensure they have the training and support needed to successfully guide their teams.
- Determine any processes or supports that are necessary for the success of this post-Summit phase, and provide those processes/ supports.

Clarification –
With the end of the regular Summit sessions, the Coordinating Committee's work is crucial. Teams will need clarification on/around items and processes, and the Coordinating Committee will be their *go to* people for answers and support.

Cash (Disbursement) –
Provide resources, such as cash and research data to support the action team efforts, if available.

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Appendix D: Sample Community Summit Plan

Clear Vision Poverty Summit
Community Engagement Overview

Introduction

In October 2016 Clear Vision Eau Claire will convene a Poverty Summit, a citizen-led, multi-year, and multi-generational public engagement and problem-solving project to identify and take action on critical community issues related to poverty and income inequality in Eau Claire County.

The Poverty Summit builds on the experiences of smaller scale community empowerment summits Clear Vision convened in 2012 and 2013 and the results of county-wide community dialogues held in 2014-15 that identified issues related to poverty as a major concern throughout Eau Claire County. Concerns about living wage jobs, the rate of poverty, underemployment, and the related debilitating personal impacts on households with children were cited as major concerns in the 2015 Eau Claire City Comprehensive Plan. Poverty has also been identified as a significant concern by the Eau Claire Area School District, Eau Claire County, United Way of the Greater Chippewa Valley, and the City/County Health Department Healthy Communities initiative.

The Problem

The per capita poverty rate in Eau Claire County increased from 12.9% in 1980 to 14.5% in 2015. The poverty rate for the City of Eau Claire increased from 14.8% in 1980 to 17.7% in 2015. One in five children under 18 in Eau Claire County are food insecure (defined as limited or uncertain availability to healthy, adequate and safe food for a healthy and active lifestyle). Over 40% of the students enrolled in the Eau Claire Area School District qualify for free or reduced lunch.

Outcomes

Key Summit outcomes include:
1. Reduce the number of individuals and families living in poverty
2. Build more resilient, thriving and inclusive communities that empower citizens to act

Project Coordination

The Clear Vision Board will provide overall project coordination for the Poverty Summit. During Phase 1 the Clear Vision Board will convene an Initiating Committee to complete a stakeholder analysis and develop stakeholder recruitment strategies, including strategies to involve non-traditional public engagement participants. For Phase 2 and Phase 3, the Clear Vision Board will appoint a Summit Coordinating Committee of 15 members, drawn from the Board and stakeholder participants, to coordinate the stakeholder engagement process and action plan implementation.

Key project objectives include:
1. Train 150-200 stakeholder and action team participants in core relational problem-solving skills
2. Include active participation of lower income community members
3. Integrate digital and mobile engagement applications with face to face deliberation.
4. Create public leadership opportunities in both traditional and citizen led settings
5. Empower up to six action teams to develop and implement action strategies.

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Project Phases

The Poverty Summit includes three phases:

1. **Pre-Planning (March-September 2016)**
   Key tasks include:
   - o   Secure project funding
   - o   Complete logistics and facilities planning
   - o   Complete final design of stakeholder engagement and action team implementation
   - o   Complete stakeholder analysis to identify and recruit 150-200 participants reflecting the diversity of community organizations, demographic, and economic experiences.
   - o   Identify specific recruitment strategies to expand active participation of lower income and impacted populations in the public engagement process
   - o   Complete a summit technology plan to guide the use of social media, digital applications, and the Clear Vision website during the summit process

2. **Stakeholder Engagement (September 2016-March 2017)**
   Key tasks include:
   - o   Compile and make available a broad array of data regarding poverty in Eau Claire County
   - o   Recruit a diverse mix of community stakeholders
   - o   Use social media and digital technologies to engage the broader Eau Claire County community
   - o   Recruit and train Clear Vision coaches to support Summit action teams
   - o   Convene a series of seven community stakeholder engagement work sessions
   - o   Organize stakeholder action teams to address community poverty priorities
   - o   Train all action team participants in Clear Vision relational problem-solving skills
   - o   Prepare 5-year action plans for each of the community poverty priorities

3. **Implementation (March 2017-December 2018)**
   Key tasks include:
   - o   Focus on implementation of action plans
   - o   Support Summit action teams in building community connections and relational power to fund and implement action plans
   - o   Monitor, fine-tune, and adjust action plans
   - o   Evaluate and celebrate achievements

Phase 2 Stakeholder Engagement Schedule

The stakeholder engagement phase includes a series of three-hour public meetings held approximately every three weeks beginning in October 2016 and concluding in March 2017. The projected stakeholder meeting schedule includes seven sessions:

- ▪ Oct 6   2016   Session 1: Kickoff, Project Overview, and Snapshot of Poverty
- ▪ Oct 27 2016   Session 2: Visioning, Data Scan, and County Poverty Issues
- ▪ Nov 10 2016   Session 3: Select Priority Issues and Organize Action Teams
- ▪ Dec 8   2016   Session 4: Skill Training and Action Team Planning
- ▪ Jan 19 2017   Session 5: Action Team Planning
- ▪ Feb 9   2017   Session 6: Action Team Planning
- ▪ Mar 9 2017   Session 7: Action Team Coordination and Implementation Scheduling

Appendix E: Co-Coaches Job Description

Overview

Two co-coaches will be recruited and assigned to each summit action group. These co-coaches will be responsible for coordinating meeting agendas and schedules, and for assisting work group participants in using the Clear Vision Process skills to develop and implement the group's action plan. Coaches serve as process stewards and facilitators for their action group and as the contacts for coordination with the efforts of the other summit action groups.

Core Responsibilities

- Use the Clear Vision civic problem-solving core concepts and problem-solving skills to guide the efforts of an action group in: conducting meetings, identifying and researching issues, clarifying charter statements, and developing and implementing the group's action plan.
- Ensure effective planning and preparation for action group meetings.
- Monitor the work group's schedule and resolve conflicts affecting progress of the work group towards its goal.
- Serve as the group's primary communication contact with Clear Vision Eau Claire through attendance at Coordinating Committee meetings and other summit action groups regarding coordination of action group progress and activities.

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Appendix F: Pulling It All Together:
The Organizing Plan Worksheet for Action Groups

1. Getting Started: The Assessment Phase	**Organizing Tool**
• What is the issue that concerns us?	Values House
• What is our self-interest in wanting to organize on this issue?	Self-Interest
• What do we know about our community/issue?	Research
• Who (or what geographic area) do we want to organize?	Power/Issue Map
• Why do we want to organize the group/area?	
• Who will be involved in the organizing effort?	Power Map
o What are our group's strengths?	
o What are weaknesses?	
• Who do we already know that we can involve?	Power Map
o What is their self-interest in becoming involved?	Core team/One-to-ones
o Why would it make sense for them to become involved?	Power Map/Stakeholder assessment Self-Interest/Coalition Building
• Who else should we talk to?	Power Map/Stakeholder assessment
• What are some of the end results we hope to achieve?	
• What resources do we already have?	Power
• What challenges and/or obstacles do we know about?	Power
• What is everyone involved willing and able to contribute to this effort?	Action Plan

2. Outreach	
• How will we conduct outreach?	
• Who is responsible?	One-to-ones & Research
• When will outreach be done?	Action Plan
• What is our timeline for outreach?	Action Plan
• What will the focus of our outreach be?	Action Plan
o What will we ask people about? What do we hope to learn?	
• Do volunteers involved in outreach need training and practice?	Coaching
• What do we want to happen after the initial outreach?	Organizing/Action Plan
o (Form a group, increase involvement, have an event, etc.)	
• When is our goal to have our first meeting/event/action?	Organizing/Action Plan
• How will we identify major issues?	Power/Issue Mapping
• How will we facilitate developing an action plan with the group?	Five Whys/Charter Statement Action Plan Template
• What else do we need to know to work on this issue?	Re-map/Research/One-on-Ones

Contact Information

Clear Vision Eau Claire Website:

http://www.clearvisioneauclaire.org/

Center for Democracy and Citizenship Website:

http://www.augsburg.edu/democracy/index.html

Community Visioning and Strategic Planning Handbook from the National Civic League:

https://www.nationalcivicleague.org/resources/community-visioning-strategic-planning-handbook/

Public Achievement model as developed by the Sabo Center for Citizenship and Democracy:

http://inside.augsburg.edu/publicachievement/

A different world cannot be built by indifferent people.

-- Harace Mann

A generous heart, kind speech, and a life of service and compassion are the things which
renew humanity.
-- Buddha, 563-483 BC

A government that remembers that the people are its master is a good and needed thing.

-- George H. W. Bush

A person is a person through other people.
-- Sotho, Lesotho Proverb

And so, my fellow Americans, ask not what your country can do for you- ask what you
can do for your country
-- John F. Kennedy

The central problem of the 21st century is the development of civic agency. Civic
agency is the capacity of human communities and groups to act cooperatively and
collectively on common problems across their differences of view. It involves
questions of institutional design (that is, how to constitute groups, institutions, and
societies for effective and sustainable collective action) as well as individual civic
skills. Civic agency can also be understood in cultural terms, as practices, habits,
norms, symbols and ways of life that enhance or diminish capacities for collective
action.
-- Harry C. Boyte

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Notes