Workshop in Facilitation and Collaboration Tools #3
Marysville, November 13, 2014, 10am to 4pm

**Location:** Yuba County Office of Education /Preparatory Charter School. at 1104 E St., Marysville, CA

**Desired Outcomes:**
- To improve communication, facilitation and collaboration skills within the group
- To provide discussion of real life collaboration challenges facing the group
- To share the expertise of a guest speaker

**In attendance:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
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<tbody>
<tr>
<td>Rina Banuelos</td>
<td>Sutter Yuba Mental Health</td>
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<tr>
<td>Abigail Dan</td>
<td>Tehama County Resource Conservation District</td>
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<tr>
<td>Lanay Gouailhardou</td>
<td>Salvation Army</td>
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<td>Yuba Sutter Corp</td>
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<tr>
<td>Alicia Hrico</td>
<td>Yuba County of Education</td>
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<tr>
<td>Kim Ingram</td>
<td>Univ. of Cal Cooperative Extension</td>
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<tr>
<td>Lynn Lorenson</td>
<td>Nevada County RCD</td>
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<tr>
<td>Jim Nelson</td>
<td>Nelson Facilitation</td>
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<tr>
<td>Rachael Norton</td>
<td>Plumas County Fire Safe Council</td>
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<tr>
<td>Victoria Ortiz</td>
<td>California Tahoe Conservancy</td>
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<tr>
<td>Cathy Le Blanc</td>
<td>Camptonville</td>
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<tr>
<td>Diane Leighton</td>
<td>Bridges to Housing</td>
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<tr>
<td>Anne Lombardo</td>
<td>Univ. of Cal Cooperative Extension</td>
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1. **Welcome and overview:**

Anne Lombardo from the Public Participation Team of the Sierra Nevada Adaptive Management Project (SNAMP) welcomed the group and reviewed the day’s agenda and goals as well as logistics.
Kim Ingram from SNAMP’s PPT team introduced an active listening exercise that gave the participants a couple minutes to introduce themselves to each other and share where they see themselves in 10 years. They then took turns sharing what they had learned from each other with the group and discussing positive and negative listening behaviors.

Anne went on to set up a set of ground rules with the group’s input as an example of their first agreement of the day together.

1) No personal attacks – talk about issues not personalities
2) Say it once concisely
3) Breathe – catch your breathe
4) Honor time commitment
5) Patience – do not interpret – ask
6) Honor electronic etiquette
7) Seek understanding

2. Key Tools for Collaborative Adaptive Management:

Kim shared the success triangle with the group and discussed the need for a group to commit to the processes and relationships that are needed to get to meaningful results. All three aspects of the triangle are critical.

Anne reviewed a one page graphic summarizing the many pieces that go into organizing a successful meeting.

Stakeholder Analysis: Who needs to be present? Kim reviewed the importance of doing a good stakeholder analysis early on. It is important to consider all potential stakeholders; particularly the ones you feel might have the most issue with your topic. It is important to involve all those affected as early on as possible. It takes time to build trust and to be brought in late builds suspicion. Be willing to communicate with
stakeholders in the manner they are capable of: in person visits, calls, emails, electronic capabilities.

We then broke participants into two groups and recorded a list of potential stakeholders for a Camptonville biomass facility scenario provided by one of the participants:

- Contractors
- Fire Safe Council
- Fire Men
- Social
- Recreation/ORV
- Hunters
- Property owners
- Neighborhoods
- Community
- Government Supervisors
- Sierra Nevada Conservancy
- US Forest Service
- National Forest Foundation (regulatory agencies)
- Experts – wood group, tech vendors
- Lumber world – owners
- Agriculture - biomass
- Wildlife – environment
- Utilities
- Labor

It is a good idea to identify potential stakeholders that may be against the project:

- Center for Biological Diversity
- Sierra Club
- Hunting groups
- Off road vehicle groups
- Bird/wildlife groups
- Fish groups
- Unions – pipe fitters, etc
- Cal trans
- Air resources board
- Anti – tar
- Look at Senate Bill opposition
- Tribes
- Regulation that effect production
Key Agreements: Anne reviewed the importance of teasing out and capturing key agreements. They are stepping stones to building the group’s capacity to work together. They help keep track of the group’s progress. It is important to make sure the group understands the agreement under discussion. State it clearly, make refinements if necessary and seek clear agreement before recording.

The group again broke into two groups to discuss the kinds of key agreements that might be helpful for the *scenarios* provided by a participant regarding an MOU, that after a long development process, got shot down by upper management and resulted in a demoralized work crew.

Potential key agreements needed:
- Ground rules
- Transparency process
- Website posting process
- Partnerships involved
- Relationships needed
- Decision making process – define who
- On roles and responsibilities
- Agree on a need – goals, objectives, vision
- To review other agreements already made with agencies
- Clear processes - establish protocol/committee
- Form of input, recording, response
- Legal advice
- Dissolution agreement “severability clause”

III. Guest Speaker: Jim Nelson from Nelson Facilitation spoke about the **five capacities** he felt were important to any collaborative project to inspire creativity. The bottom of the triangle starts with the physical capacity followed upwards by the intellectual, emotional, intuitive and spiritual capacities topping the triangle.

He pointed out that within any context there exists **substance, process and relationships**. Maintaining a good balance of those three pieces is important, if any one aspect takes over and becomes dominant it can upset the whole.
Jim also explored the idea of rapport – something that builds through communication, engagement and the building of trust. Words make up only about 7% of rapport, voice makes up about 38% and body language makes up the largest remaining portion.

Jim is available at Nelsonfacilitation@gmail.com or (530) 945 – 3104.
IV. Key Tools in Collaborative Adaptive Management Continued

**Decision Making:** Kim reviewed the need to be clear about the decision making method(s) the group will use early on. This can be spontaneous agreement, one person decides, compromise, multi voting to majority voting or consensus building or a combination of these. Clarifying this will help avoid false expectations.

Kim shared an article on “Are you a maximizer or sufficientizer” that illustrated different decision making traits and perceived levels of happiness and satisfaction. The article was in reference to one of the participant’s *scenarios* regarding the challenges of working with “maximizers” - people who have to consider ALL aspects before being able to make a decision. This characteristic can bog down the forward progress of a group and be frustrating to others. We discussed ways to cope with this trait which include defining boundaries of time and scope, seeking outside dialog to help move through the discussion, gathering information to inform concerns and highlighting past successes.
Dealing with Difficult Behaviors: Anne reviewed some valuable tools for dealing with trouble during a meeting. The many pieces to her successful meeting graphic shared earlier are part of the effort: proper meeting notice, a good room, shared agenda planning, setting desired outcomes/goals, a good stakeholder analysis and role clarification can serve as a path to reduce difficulties in a meeting. Once in a meeting: establish ground rules, review existing boundaries and constraints as well as the decision making process the group will use, capture key agreements, action items, next steps, and any clear processes for known tasks. Be sure to share clear notes. Do not be afraid to evaluate the group’s efforts to seek improvement.

Parking Lot and Accept/legitimize/deal with/or defer: When people have strong feelings about issues, they tend to bring up the same comments repeatedly. If your agenda does not allow for prolonged discussion of their issue you must find a way to move on. People want to feel heard so first one must accept the comment. Summarize it to be sure you have it correct. That helps legitimizes their concern. Then be clear. Can you will deal with the issue now and how? Or if now is not the time, capture the concern in the notes and clearly state when and how it will be dealt with in the future OR the reason(s) it cannot be dealt with.

Flip chart notes taken during the difficult behaviors discussion:
- Be willing to show empathy for others views.
- Enneagram – an app shared by a participant. Enneagrams are a personality classification system used to gain insight into personal interaction/work dynamics.
- Celebrate your successes.
- Remember that feeling listened to is powerful.
- Facilitators must create and maintain a safe place.
- Help people focus on issues not personalities.
- Ask what additional information the group needs to move forward.
- Ask the group what it thinks.

The group discussed a scenario shared by a participant regarding conflict between peers originally hired together and now struggling with the inequality of one supervising the other. Ideas for ways to deal with the issue included:
- A clear show of appreciation for the other’s help
- A review of goals and desired outcomes as well as any boundaries/constraints and any decision making processes in the future.
- Provide a consistent time to catch up/talk about work to help maintain the relationship.
- Be sure to provide clear processes for tasks to avoid confusion.
- Review key agreements
- Share notes of conversations for clarity and be open to evaluation.

Managing Conflict: The group worked on a scenario Kim provided from her Tahoe workshop on varied interests around a watershed project. We identified a note taker and a facilitator from the group. As they took feedback from the group we shared some challenging behaviors to help the facilitator and group work through them such as comments that were repetitious, negative, loud, and off topic. They both did a great job of capturing concerns! Flip chart notes:

Goals for today’s meeting:
- List of potential projects/concerns
- Economic – more money for community (tourism)
- More fish salmon, trout
- More trails
- Community access to rivers
- More horse trails
- Address invasive species

- Increase hydro capacity – bigger dams
- Agricultural security
- Private property rights
- Trash
- Compliance with bill?

Things to think about:
- Identify contentious issues ahead of time
- What kind of meeting is this, set goals and objectives – who is the audience
- A good stakeholder assessment
- Food helps
- Individuals speak that represent different views

- Have a note taker and a facilitator
- Outreach message and methods
- Capacity transfer – for any long term project – who will back up your reps if they leave. Spread the knowledge
- Allow participants time to pre read important documents
- Clearly capture key agreements
Next steps:
- Evaluate current conditions – hire a consultant, investigate current information – Cathy – 2 weeks
- Community awareness – website updates – Melony and Alicia
- Email list – establish roles

Action items:
- Follow up meeting – 2 weeks
- Cathy – investigate info – 2 weeks
- Alicia – post note web – Monday
- Emily – local media
- Kim – blog
- Public meeting – 1 month

Resulting parking lot:
- Unintended consequences of each project
- Trespassing issues

V. Wrap up, next steps and evaluations: A final written evaluation of the workshop was handed out at the end of the meeting. The results of evaluations from all three workshops are graphed below.

A verbal evaluation was also done: The group enjoyed the, brownies and chocolate, the multiple presenters and good energy, the room and the lack of a power point. They felt the follow up meetings were good and using their own scenarios helped.

They would like to have used more of the participant examples.
<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Educational content</td>
<td>96%</td>
</tr>
<tr>
<td>Alignment with needs</td>
<td>92%</td>
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<tr>
<td>Relevance to the workshop</td>
<td>84%</td>
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<tr>
<td>Clarity of explanation</td>
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<tr>
<td>Engagement in the workshop</td>
<td>86%</td>
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<tr>
<td>Workshop format</td>
<td>84%</td>
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<tr>
<td>Workshop atmosphere</td>
<td>80%</td>
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<tr>
<td>Workshop organization</td>
<td>78%</td>
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<tr>
<td>Workshop content</td>
<td>76%</td>
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<tr>
<td>Overall evaluation</td>
<td>64%</td>
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General: 62% satisfied with the workshop.
Scenarios for Marysville

1. I work with someone that was originally hired as a peer to me, but I have since been made her supervisor. She and I often see things from different perspectives and our interactions feel antagonistic (and I feel frustrated).

2. Difficulty in reaching a decision when one or more participant is a "maximizer" decision maker. This type cannot make a decision for fear it will not have a perfect outcome & is not ever happy with a decision as one more factor could have been considered.

3. A particularly lengthy memorandum between multiple staff members got incredibly unwieldy with too many individual voices and opinions. Eventually it went to executive staff and was ripped to shreds, demoralizing the original authors and creating tension amongst staff. This process may have been smoother had there been an initial meeting with Executive Staff to explain some of the logic behind the writing of the document.

5. In Camptonville we are working with a diverse group of stakeholders to develop a small local biomass to energy facility that will use timber harvest slash to generate electricity as part of SB1122. The community would like to see a reduced forest fire hazard, good stewardship practices and local jobs created. The property owner has the same goals. We are seeking project developers who are in-line as well.

6. Our non-profit board often looks only at the details and is less concerned about the bigger picture. Getting everyone on the same page is an exercise in the collaborative process.