

Convening Forums in Your Community or Organization

While moderating and recording are important to deliberative forums, the role of convener is also crucial to developing a deliberative habit in a community or organization. Remember that we are all on journeys to become better moderators, conveners and recorders. Below are some tips/strategies for starting and maintaining a habit of deliberation, whether it is your 1st forum or your 50th.

Getting Started

1. **Form a steering committee or partnership.** Create a short statement about the purpose of the group. Recruit people who will help find ways to implement deliberative discussions in your community or organization. Look for steering committee members who have skills in different areas, such as planning, organizing, publicity, recruiting people, and networking. Keep in mind that a well-functioning steering committee is important to the long-term maintenance of a deliberative habit.

Build a broad base of support for local public issue forums to ensure participation from many segments of a community and spread the workload to prevent burnout of committed volunteers. Starting small with 2-3 members is often effective for new steering committees. As the forum influence grows, add more members and increase the diversity of the connections to further the growth and outreach of the public politics process. Following are some guidelines for creating positive partnerships that will help ensure the success of local forums.

- Be inclusive. Successful forums represent a diversity of interests, resources, and perspectives.
- Invite partners to participate at the earliest stages of planning a forum. Give them ownership in the forum and the opportunity to contribute their special skills, resources, and points of view. They will be far more likely to fully participate if they are part of the planning process as well as part of the forum implementation.
- Clearly define the roles for partners. What skills and resources do they bring to the table that will improve the capacity for public deliberation? Delegate tasks that best serve the partners' needs and interests, so that all parties feel rewarded for their efforts. Who is the partner's contact? What are their tasks? What kind of timetable to complete the assignment? How will their contribution be recognized?
- Make sure all partner(s) understand the mission and goals for the local public issues forum. Communicate clearly why the forum needs their participation. Ask the partner what their expectations are and how they hope to benefit. From this discussion, you can build a mutually beneficial relationship that will be long lasting.

Refer to the "Representation Matrix" form in this section for ideas to add diversity to your steering committee.

2. **Start out small to build more confidence and skills in moderating, recording and/or convening.** For your first forum, gather friends, colleagues or a group that already meets. Contact your local library and hold a forum on some relevant issue.
3. Keep in mind that there are **many ways to define success for a forum**, such as:
 - Forum participants tell you:
 - They liked the experience and want to know when the next deliberative forum will be held.
 - They learned something new about the issue and about how others think about it that is different from their own perspectives.
 - They used to think they had the solution, but now they realize there are complexities they had not anticipated.
 - They are struggling with values that are in tension.
 - They want to organize for action on the issue.
 - Common ground for action was identified.
 - Trade-offs were identified.
4. **Decide on the purpose** of the deliberative forum. Most conveners hold deliberative forums to do one or more of the following reasons:
 - Build a community or organization’s capacity to use deliberative forums to address complex, difficult public issues – usually a regular schedule of deliberative forums on various issues (e.g. holding forums at the local library 4-6 times per year).
 - Help forum participants find avenues and resources to take individual and collective action to address a public issue.
 - Contribute to public policy.
 - Help people address “hot button” public issues.
 - Contribute to self-rule.
 - Find resources to address a public issue.
 - Gain a larger public voice, the public’s understanding of the issue – learning the collective perspective of hundreds or thousands of forum participants who have weighed the approaches and identified trade-offs and common ground for action.

Whether it is the steering committee’s 1st forum or the 20th, the purpose of the forum will influence several things, such as: the choice of issue book/framework, publicity and recruitment, and reporting.

5. **Remember that deliberation is a continuing process that requires time to address complex issues.** A situation requiring some immediate action is generally not an issue that is suitable for the more time-consuming process of developing an issue framework and convening deliberative forums.
6. **Choose an issue book/framework** that will resonate with community or organization members and fit the forum’s purpose(s). Until the group is familiar with deliberation and you are comfortable with your role, you may want to avoid a highly charged issue.

The issue chosen will help shape the deliberation. Some issues lend themselves to more intellectual deliberations; some issues tend to evoke very personal reactions and actions.

7. **Determine how many people you want at the forum.** Forums work with different numbers of people. The larger the group, the more exposure people will get to the issue and the process and the less participants will interact with each other. The smaller the group, the more opportunity people have to speak and interact, but there is usually less diversity of perspectives in small groups. At least eight people are helpful to have enough group energy to support deliberation. Conveners typically try to have 15-25 forum participants.

New steering committees often start with convening one forum for 15-25 participants. As the committee's reputation grows over time, so does the public's interest and more people want to attend the forum. Some steering committees address this interest by convening concurrent forums at the same time/location with multiple rooms and moderator/recorder teams or by convening multiple forums at various locations and times over several days.

8. **Identify co-sponsoring groups, if desired.** Co-sponsors can lend credibility and resources, as well as have an interest in the public's voice on an issue. A newly-formed steering committee may seek out co-sponsors who are interested in the issue to be deliberated and/or simply support efforts to engage the citizenry in public decision making.

Over time, after a steering committee or partnership develops a reputation through convening several forums, other groups sometimes seek out the steering committee when they want to engage the public on an issue. Sometimes there is an existing deliberative forum issue framework that can be used; if not, your steering committee will have to determine if it has the resources and expertise to develop an issue framework. The committee may also engage in helping the potential co-sponsor determine if their issue lends itself to public deliberation.

When convening a deliberative forum using a National Issues Forums (NIF) book or framework, NIF is considered a co-sponsor to be acknowledged at the beginning of the forum. The Oklahoma Partnership for Public Deliberation should also be named as a co-sponsor.

9. **Plan for helping forum participants move to action.** After the forum, it is fairly common for forum participants to ask how to move to action in the community. Consider offering handouts or scheduling a follow-up session on how to move to action. Be firm, however, in keeping the steering committee as an advocate for deliberative forums and avoid being seen as an advocate for a particular action on any given issue.
10. **Plan for reporting forum outcomes** to the people who would want to know, such as:
 - forum participants
 - stakeholders in the issue
 - forum co-sponsors
 - the public

11. **Prepare/maintain a “Forum Kit”.** Moderators and recorders may provide some of their own supplies, but conveners find it helpful to have their own set.

- Markers (choose markers specifically labeled for flipcharts):
 - Bold colors (blue, brown, purple, green, red, and orange). Pastel markers and yellow are too pale.
 - At least 2 black markers – that’s the color you’ll use the most.
 - Bullet-tip markers are preferable to chisel tips.
- Masking tape, if not using paper with adhesive strips
- Free posters from NIF:
 - To protect for reuse with masking tape, apply strips of 2”-wide clear shipping tape on the front and back of the top and bottom edges of the poster.
 - Posters come with the content folded to the inside. For quick identification, apply a typed label to each poster so you don’t have to unfold them to see which is which.
- Name tags – plain adhesive type
- Felt-tip pen for name tags
- Forum sign-in sheet (two examples are in this section of the notebook)
- Pen for sign-in-sheet
- Timekeeper cards: three index cards with 5, 1 and 0 in two-inch letters
- A copy of the “Recording” section of the notebook
- [Optional] – Clock

Keep all of the above items together in one package. The 2-gallon Zip-Loc bag works well. Type a label to the bag listing all the items that should go back in it. People often want to help conveners pick up after a forum, and the label lets them know what belongs back in the kit.

Regarding **flipchart easels** and **flipchart pads**:

- Flipchart easels with a solid back cost more and are heavier but sturdier than those with only a cross bar at the top. Recorders tend to prefer easels with the solid back.
- Flipchart paper should be resistant to letting the markers bleed through the paper. Pads are available with or without an adhesive strip across the back top edge of each sheet. Pads with adhesive strips generally cost more, but the adhesive often works better than masking tape, depending on the type of wall in the forum room. Labeling the flipchart sheets prior to the forum can be problematic with adhesive-backed sheets if the recorder plans to keep all the sheets attached to the pad until their use during the forum.

Logistics Related to Convening

In addition to the considerations mentioned above, the convener handles several logistics that contribute to the effectiveness of the deliberative forum. It is the role of the convener (either an individual or committee/partnership) to do the tasks described on the checklist.

Logistics Checklist

Task	Person(s) Responsible	✓
1. Select the date/time and accessible location for the forum. Ensure adequate time to deliberate all approaches in the issue framework at one sitting. Be sure locations are large enough to accommodate room for the recorder to post flipcharts on the walls. Confirm who is responsible for room set up – you or the facility?		
2. Secure the moderator/recorder team. Make sure all expectations of each other are clear and feasible, including pre- and post-forum expectations such as arrival times, flip chart transcription, tallying/collecting pre- and/or post-forum questionnaires (if any), the Moderator’s Response form, room set up, posters, and equipment needs.		
3. Promote the forum and recruit forum participants. Make sure publicity is accurate about the focus and sponsors of the forum and is distributed in a timely manner.		
4. Communicate with the moderator and recorder to determine necessary support materials, such as flip chart easels, flip chart pads, markers, tape, and other materials set for recording.		
5. Order issue guides/books and the companion starter video (if available) well in advance, along with the following posters: Guidelines; Reflections; and NIF.		
6. Plan to arrive at least 30 minutes before the forum starts and stay at least 30 minutes after the ending time.		
7. Distribute issue frameworks to participants about a week in advance so they can be read before the forum. Instruct people to bring them to the forum.		
8. Have chairs arranged in a horseshoe or other interactive arrangement. Using chairs only is more engaging than using tables/chairs. Ensure that chairs are away from walls so the recorder has room to post flipcharts.		

9. Arrange for video equipment if there is a starter video. Arrive early to set up the equipment and make sure it works. Practice with the video if possible. Remember the extension cord!		
10. Work with the moderator to determine who hangs the posters.		
11. Secure someone to create a report of forum outcomes.		
12. Bring copies of Pre- and Post-Forum Questionnaires, if needed. Bring extra pencils.		
13. Bring 2-3 extra copies of the issue guide		
14. Prepare a sign-in sheet and bring a pen.		
15. Arrange for refreshments and childcare, if feasible.		
16. About 5-7 days prior to the forum, reconfirm participant attendance and remind them to bring their issue guides.		
17. Learn the location of light switches and restrooms.		
18. Provide name tags with first names only.		
19. At the forum, welcome/host participants as they arrive.		
20. After the forum: <ul style="list-style-type: none"> • Collect the flip charts and transcribe them, unless the recorder is doing this. • Collect the pre- and/or post-forum questionnaires (if any) and tally them, unless the moderator/recorder team is doing this. If using an NIF issue framework with NIF questionnaires, send the questionnaires to NIF. • Receive the Moderator's Response form from the moderator within 1-2 days after the forum. If using an NIF issue framework with NIF Moderator's Guide (Moderator Response form is usually on the back cover), send the form to NIF or enter it on the NIF web site. • Prepare any post-forum reports on forum outcomes and share with forum sponsors, participants and the public (see the Reporting section of you OMRA notebook). 		

Representation Matrix

A worksheet to help you think about recruiting a Local Deliberative Forums Steering Committee from all parts of the community/county

	Business	Civic & service clubs	Media	Target audience representative	Health	Education	Religion	Human services	Government	Volunteers			
Geographic areas													
Cultural groups													
Skills / Expertise													

- 1) In column 1, write in the subgroups important to your deliberative forum work (one row per subgroup) under each of the three headings (geographic areas, cultural groups, and skills/expertise).
- 2) Put names in appropriate squares. It is not intended that all squares be filled in – remember, you are looking at a group of 5-15 persons. One person may represent multiple segments of the community/county, so you may write that person’s name in several squares.
- 3) Feel free to adapt the worksheet as needed.

Adapted by Renée Daugherty and Sue Williams of the Oklahoma Partnership for Public Deliberation from material developed by the University of Missouri Community Development Academy

Sample News Release Announcing an Upcoming Forum

IMMEDIATE RELEASE

Citizens to Identify Common Ground on Intimate Partner Violence

Anytown – Every year several million adults, both women and men, experience violence at the hands of their intimate partners. The violence may be physical, emotional or both and involve husband and wife, ex-spouses, boyfriend and girlfriend, or co-habiting adults (man and woman or same sex couples). The costs of intimate partner violence are huge. Economic costs alone are estimated to be nearly 6 *billion* dollars each year. The emotional costs are uncounted.

To address this issue and to search for a common direction towards public action, the Organization for Public Action will be holding a Deliberative Forum facilitated by trained moderators and recorders, John Brown and Jane Green, using the Intimate Partner Violence Issue Book. This issue book presents three perspectives on the question of what can be done to reduce the incidence and the emotional and economic costs of such violence.

The deliberative forum will be held at the Anytown Public Library at 401 S. Streetname on December 4, 2006 starting at 1:00 PM and ending at 3:00 PM. For more information, call the Organization for Public Action at (555) 555-5555.

Contact person:

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Secretary

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So What Do You Do Next?

Oklahoma Moderators and Recorders Academy

Final General Session

When	What	Support materials
NOW!	Connect with people here <ul style="list-style-type: none"> • Schedule time to talk again 	<ul style="list-style-type: none"> • Participant List • Moderators & Recorders at www.OKdeliberates.org
	Make Local Contacts <ul style="list-style-type: none"> • Team with other OMRA classmates and OMRA alums in your area • Form a local steering committee • Identify committee members' skills • Select a forum topic from the NIF web site • Find a forum location • Develop/implement a publicity campaign 	<ul style="list-style-type: none"> • Logistics Checklist • OMRA notebook • Representation Matrix form • CEPD Packet • www.OKdeliberates.org
	Order Materials including free posters Conduct Planning Meetings <ul style="list-style-type: none"> • Who is going to do what? • Think through physical environment • Why and how are you going to report results? 	<ul style="list-style-type: none"> • Logistics Checklist • NIF website www.nifi.org (Click on Issue Guides)
	Conduct Forums <ul style="list-style-type: none"> • Have participants sign-in on sheet provided Report Results <ul style="list-style-type: none"> • Send to (fill in name here): <ul style="list-style-type: none"> ○ Moderator's Report ○ Flipchart recordings ○ Sign-up sheets • Locally (newspaper, stakeholder groups, etc.) • Complete on-line Moderator Report at www.nifi.org 	<ul style="list-style-type: none"> • Logistics Checklist • OMRA notebook