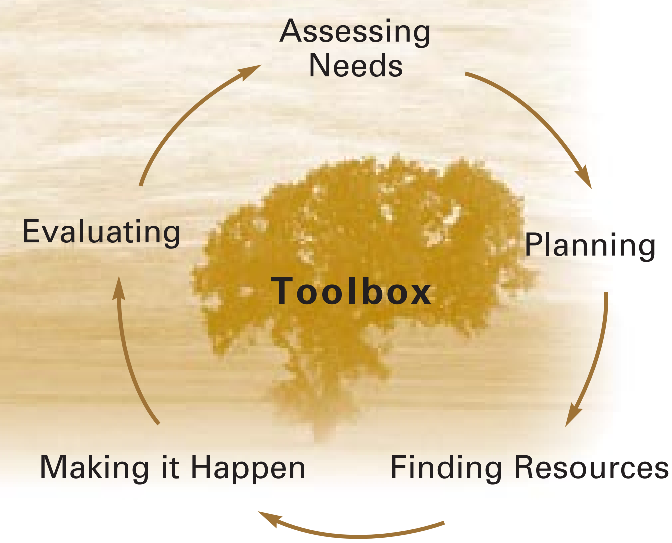
Health Canada Santé Canada

# Community Action Resources for Inuit, Métis and First Nations




## Toolbox

Canada

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# INTRODUCTION TO THE KIT

When asked "What is a community?", Aboriginal people often answer "A community is a group of people sharing and caring."

This series of manuals is about just that: sharing information and skills to empower people so they can better care for their communities.

Training in community development and program evaluation has been identified by Health Canada and by national Aboriginal organizations as a priority need.

In order to fulfil this need, training workshops were offered between 1993 and 1995 to approximately 300 Aboriginal people across Canada, most of them front-line health workers. The training was based on a generic package of resources on health promotion and community development called the *Community Action Pack*.

Experience and feedback received from the participants during the workshops and after they returned to their communities led to the development of this new kit.

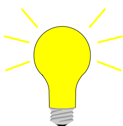
***C**ommunity **A**ction **R**esources for **I**nuit, **M**étis and **F**irst **N**ations* was developed specifically for Aboriginal people, taking into consideration their values, culture and way of life.

This kit is a self-help tool for Aboriginal people who want to get a community development project off the ground.

The series of six manuals contains information, tips, examples and ready-to-use charts that you can copy and use for yourself or to train others in your community. It is intended to be user-friendly, emphasizing questions such as what, why, when and how to accomplish the different steps of a community development project.

*Community Action Resources for Inuit, Métis and First Nations* uses a holistic approach, taking into consideration community development know-how and context as well as the human aspects that are part of the entire process.

Look for the following symbols.
They will help you apply your skills and knowledge.



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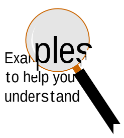


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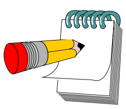


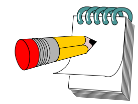
exercises

**What is a community?**

Let's take a moment to think about the word "community". Communities are not just a question of geography. People in a volley-ball league can be a community. A support group can be a community. Members of a church can be a community. Communities are people with something in common, something that is important to them. The members of a community depend on each other as they work together to accomplish challenging tasks. A community can be seen as a group of people:

- living in the same geographical area;
- sharing the same culture;
- with a common interest or concern; or
- with a shared sense of identity.

Add to or comment on this definition. What is a community to you?



**Community development:
making communities healthier**

The World Health Organization and Health Canada have defined health as more than the absence of illness and disease. Health is a sense or state of physical, emotional and psychological well-being. Health is an individual or group's ability to reach goals, to satisfy needs, and to cope with or change their environment. In a community context, it is the ability of a community to sustain itself in a caring and fulfilling way. In other words, health means looking after ourselves and others. It is promoted through having access to services appropriate to our needs. It is enhanced by living in a clean environment and by a spirit of community (feeling part of a group of people who care about each other).

This means that groups that are concerned with the kind of housing available in their community, reducing violence, developing the local economy or starting a self-help group for bereaved parents can be seen as improving and promoting the health of their community.

## A step-by-step process

Is there a secret to turning a good idea into a successful project? Actually, there is no secret. Groups follow different paths to action, yet experience shows that successful efforts use some "tried and true" steps.

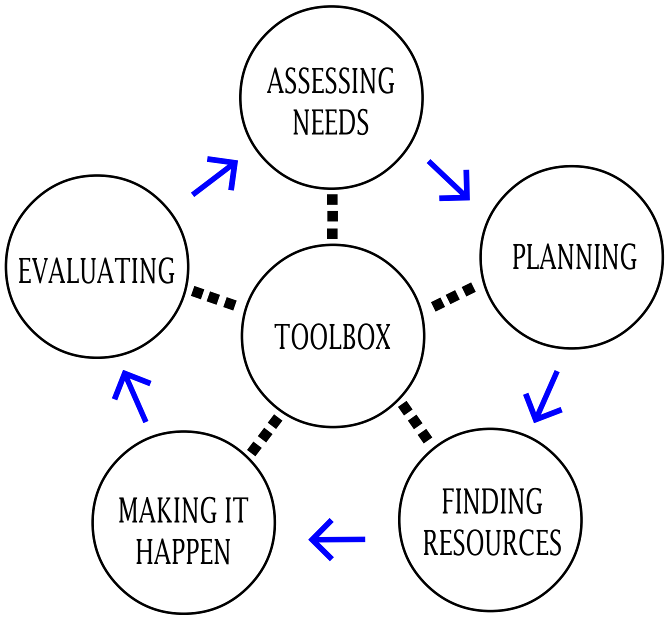
Most groups go through the steps of identifying needs, planning activities, finding volunteers and funding, evaluating and helping people work together through the normal ups and downs of an activity. *Community Action Resources for Inuit, Métis and First Nations* is built around these steps.

Starting a new activity is like planning a trip to a place you have never been.

Just as you need a map for your trip, you also need a map for your community activity. This map will help you figure out where you are, what has been accomplished, and point out what still needs to be done.

The following diagram is your map to the steps for community action that is described in *Community Action Resources for Inuit, Métis and First Nations.* Each circle represents a step in the process of developing an activity.

The interpersonal aspects of community action and the techniques needed to carry out a project, such as taking minutes in meetings, have been gathered together in the "Toolbox". This circle has been placed in the middle of the diagram because the "Toolbox" can be useful in all steps of the process.




It is important to remember that every group follows its own path, which may be different from the one shown here. There is no absolute "right" way of doing things. You need to go with what works best for you.

The process described in *Community Action Resources for Inuit, Métis and First Nations* is intended to help you plan activities, not to tell you what to do. The diagram is like a map and you can take as many side trips as you like. There are no rules!

# I. INTRODUCTION TO THE TOOLBOX

Each of the manuals in the *Community Action Resources for Inuit, Métis and First Nations* kit presents one of the stages of the community development process in detail. The toolbox is different since it contains information that can be useful at any stage in the process.

The toolbox is made up of three chapters containing three types of information:

- the interpersonal aspects of a community development project;
- facilitating tools and techniques; and
- information to help carry out a successful community development project.

To help you locate information on a subject that interests you, the headings are in alphabetical order within each chapter.

We hope that the “Toolbox” will help you to apply the community development process to your project. Good luck!

# II. THE INTERPERSONAL ASPECTS OF A COMMUNITY DEVELOPMENT PROJECT

Community development projects are set up by people, for people. So interpersonal relations are of the utmost importance.

The information in this chapter can help you manage human aspects as you go through the normal ups and downs of your community development project.

# ACTIVE LISTENING

Communication refers to dialogue involving two people. The listener has as much responsibility to ensure effective communication as the speaker.

Most people don't know how to listen. All too often, receiving information is regarded as what one does while waiting for one's own turn to speak. Active listeners are open, respectful and objective.

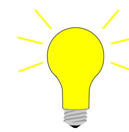
Active listening consists of really trying to understand, as much as possible, what is being communicated. It helps reduce the amount of misinformation communicated. It contributes to a positive atmosphere and improves teamwork.

These principles will help you listen actively:

- Be prepared to listen. If you have other priorities or time constraints, do not pretend to listen. It's better to put off the conversation until a more convenient time. If you decide not to wait, accept your decision and really listen.
- Try to capture the whole message. Pay as much attention to the words used as to the speaker's tone of voice and overall body language.
- Listen in an understanding and encouraging way. Use your whole body, eye contact and facial expressions to convey feelings that might help the communicator. Encouragement can be communicated by a simple nod, a smile, an "I see" or "Mmm-hmm".
- Be sensitive to the speaker. Show respect by concentrating and by avoiding distractions and interruptions.
- Clarify what the person is saying by repeating things in your own words. Ask questions, for example, "Do you mean that...?" It will help you check whether you have understood and will encourage the person to continue.

Active listening contributes to effective communication. However, barriers can be encountered. Here are some examples. Try to improve your skills by:

- not letting personal biases get in the way;
- not judging the topic or the speaker;
- not selectively listening – that is, filtering information we do not want to accept;
- not interrupting the speaker (we can listen two or three times faster than we can speak, so be patient!);
- not being distracted by the surroundings or by physical discomfort; and
- not thinking about other pressing matters.



Active listening isn't easy. It doesn't only concern hearing. It takes concentration and a certain quality of interaction with the speaker.

Active listening encourages a positive environment in which people feel more at ease in discussing issues that are important to them.

# COMMUNICATION BARRIERS

Even when an efficient system for communicating is in place within an organization or group, there may still be barriers that will get in the way of effective communication.

Here are some examples of barriers to effective communication and strategies for dealing with them.

| SITUATION | STRATEGIES |
|---|---|
| **Barrier #1: Lack of information** | |
| • Many groups spend a great deal of time discussing issues without having all of the facts. This can result in a "pooling of ignorance" and will lead to ineffective decision making. | • Know what information you need in order to make decisions and to accomplish goals. Make sure you have that information on hand when you need it. |
| • In many group settings, information is power. When a number of groups are competing for the same pot of human and financial resources, it is tempting to use information as a competitive tool. | • Ask for a sharing of information "up front" in meetings, before discussion.<br>• Emphasize the importance of cooperation in using shared resources. |
| **Barrier #2: False consensus** | |
| • False consensus is when the pressure of what a few members think or do determines the outcome of what the group does. | • Ask questions to clarify individual points of view on the issue to ensure that all members have an opportunity to address the group.<br>• Encourage differences of opinion to stimulate new ideas (e.g., "Now that we have one point of view, what other approaches come to mind?"). |

| SITUATION | STRATEGIES |
|---|---|
| **Barrier #3: Emotionality** | |
| • Although emotional reactions are normal and warrant careful consideration, excessive emotionality can block constructive communication. | • Legitimize people's feelings regarding situations that affect them. Let them know that they are allowed to react with emotion (e.g., "What kinds of feelings does this approach raise?"). |
| • Excessive anger will block effective communication. | • Acknowledge excessive anger and ask if those involved need a "time out". Resume discussions when all parties are at ease. |
| • Many people can become defensive and protective in response to situations where information is difficult to accept. | • When you feel defensive, ask a question of clarification so that you can understand the situation better. Don't try to justify yourself. |
| • Most people have a natural tendency to avoid communicating directly with people they feel uncomfortable with. | • Remind yourself that it is your responsibility to work with people, although conflicts may arise. Focus on their roles, on how they are involved, rather than on their personalities. |
| **Barrier #4: Lack of communication skills** | |
| • Communicating effectively may not be a "natural" characteristic; it is a learned skill that develops with training and experience. | • Provide training opportunities for people who need to spend time improving how they communicate (see "Active listening"). |

# CONFLICT RESOLUTION

Conflict arises when two or more members of a group have different views on an issue or decision and both consider **their** views to be the **right** ones.

### Three categories of conflicts

In general, conflicts can be placed into three categories. They can be about:

1. what is being done: the organization's purpose, policies or programs;
2. how things are being done: how the organization functions, how services and tasks are being accomplished; or
3. people's values: conflict in values involves deeply felt emotions and beliefs.

The first two types of conflicts can be resolved through discussion. Conflicts involving people's values are the most difficult to recognize and to resolve because they touch on personal beliefs.

Conflict is inevitable but it can be very constructive if properly managed. Conflicts contribute to healthy group development and make room for a variety of viewpoints.

### People's reactions

Conflict situations can be complex, causing tension and anxiety. They often bring out negative emotions.

Resolving conflicts can be difficult. Many people believe that it necessarily involves a winner and a loser.

In general, groups react to conflict in three ways:

1. Avoidance. Some people attempt to avoid conflict entirely. They tend to repress their reactions or to withdraw from the situation. Either they are incapable of facing up to the situation, or they lack the skills required for dealing with conflicts.

2. Putting off the problem. Groups using this approach either put the problem off until later, or focus on minor details while avoiding the real source of the problem.

3. Confronting the situation. This approach involves confronting different viewpoints. There are two components to this:

*a) Competition*

Competition and the use of power are considered negative. People tend to focus on personal need, generally at the expense of others. Competitive conflict management is characterized by these features:

- the parties in conflict view resolution as winning or losing;
- compromising on any point is seen as a sign of weakness;
- there is open expression of anger and frustration;
- each party to the conflict sees the other as being hostile; and
- parties are closed to important information or feedback.

*b) Collaboration*

Collaboration is a positive approach where both parties win. It is characterized by:

- both parties to the conflict are highly assertive and cooperative;
- people in conflict are open to creative approaches and ideas; and
- there is a shared belief that conflict is positive and leads to personal growth.

**Effective conflict resolution**

How can conflicts be resolved so that everyone comes out a winner? It can be achieved by following these five steps:

1. Acknowledge that conflict exists. The first stage is to say "I believe that **we** have a problem." This is not an admission of weakness. It's the expression of concern that a problem exists and the desire to do something about it.
2. Identify the root of the conflict. You may have to dig past the symptoms in a non-defensive way, until you get to the real problem and bring it out into the open.
3. Communicate your needs. Seek and provide as much valid information as possible. Communication must be open and honest.
4. Solve problems creatively. Identify as many solutions as possible. Consider a variety of alternatives and their pros, cons and consequences.

5. Select and implement the best solution. Decide how it will be done: who will do what, when? Assess the results.

The energy created by this form of conflict resolution can carry a team a long way. It can contribute to high quality interpersonal relationships and a deep commitment to implementing what has been decided. Each party understands its position, people are respectful of each other and everyone wins!

# CONSTRUCTIVE FEEDBACK

Constructive feedback consists in communicating information that can be useful when an individual (or a group) wants to consider changing a behaviour.

Constructive feedback helps people recognize how closely their behaviour matches their intentions. It is also a way people have of helping each other see how behaviour affects situations or individuals and, if necessary, working to change it.

These are some features of effective feedback:

1. It is balanced. It is easier to hear about the behaviour that needs changing when both positive aspects and those that cause concern are expressed.
2. It is asked for or agreed upon ahead of time rather than imposed. Feedback is most useful when the receivers of the feedback have formulated questions which those observing can answer.
3. It is well-timed. In general, feedback is most useful at the earliest opportunity. This depends on the person's readiness to hear it and support available from others, etc.
4. It is specific rather than general. To be told that one is "aggressive" will probably not be as useful as to be told that "just now when we were deciding on the issue, you did not listen to what the others said, and I felt forced to accept your arguments."
5. It is directed toward behaviour which the listener can do something about. Frustration is only increased when people are reminded of a personal shortcoming over which they have no control.
6. It takes into account the needs of both the listener and speaker. Feedback can be destructive when it serves only the needs of the speaker.
7. It is verified to ensure clear communication occurs. One way of doing this is to have the listeners try to rephrase the feedback they receive to see if it corresponds to what the speaker has in mind.

8. When feedback is given in a group, both speaker and listener have the opportunity to check with others in the group for the accuracy of the feedback. Is this one person's impression or an impression shared by others?

# ENCOURAGING PARTICIPATION

Participation depends on motivation. You want to reassure people that their time and effort make a difference, so stress the positive. Talk about what you think the group can do, and what people will gain from participating.

To encourage others to take part:

- be willing to communicate your enthusiasm with others;
- raise issues and concerns that directly affect the people you want to "involve";
- anticipate why people may not want to get involved;
- be clear about what is expected of people;
- try to organize each person's involvement so he or she gains personal satisfaction; and
- set realistic, manageable objectives which can be reached.

Here are some possible reasons why people do not get involved, and some ideas for overcoming the obstacles.

| **Reasons for not getting involved** | **Overcoming obstacles to get members involved** |
|---|---|
| The amount of time involved | Be clear about time expectations. |
| Topic too controversial | Stress the level of community support. |
| Problems with agency affiliation | Encourage people to attend as individuals.<br><br>Ask for administrative support. |
| Territoriality, "That's your job not mine." | Stress the need for a community focus. |
| Fear of failure or "It's been done before." | Stress what your group **could** do; focus on the possibility of small victories. "We won't change the world, but at least the lives of five people in the community will be improved." |
| Lack of knowledge | Not everyone has to be an "expert" and everyone can learn from one another. |
| What other reasons might people in your community give for not getting involved?<br><br>____________________<br>____________________<br>____________________<br>____________________<br>____________________ | How can you overcome these obstacles?<br><br>____________________<br>____________________<br>____________________<br>____________________<br>____________________ |

Here is an excerpt from the *Aneshenewe Machitawin* booklet on the subject of participation. It was written by Native people and talks about a successful community development experience. Despite enormous difficulty, the people established a community laundromat at Kingfisher Lake. This text explains how the Elders motivated people in the community to get involved.

> *(...) What happened at Kingfisher Lake didn't come from outside. It came from the older people. And they are very spiritual...spiritual leaders. The older people are always talking about people getting along, and living a full spiritual life. So one of the things they said was: "We should try to handle our own affairs – like we did a long time ago, when we trapped and hunted, instead of being dependent on welfare or handouts." So they understand. The way they said it was: "To be spiritual is to be strong. You've got to be an independent human being. You shouldn't be selfish. You have a responsibility as a human being to take care of your children. Think of the future. You have a responsibility to think of the future of your children, to use your abilities."*

* **CREDIT:** *Aneshenewe Machitawin, Human-Centred Community Development*, Sainnawap, Bill; Winter, Noa; Eprile, Paul, The Participatory Research Group Toronto, Ontario. (Reprinted 1993).

# HEALTHY ORGANIZATION

Like healthy people, healthy organizations get more done. You can often assess an organization's health by its atmosphere and the effectiveness of the group. Here are several factors that influence an organization's health:

- The reason it exists, its goals and objectives: Are they well-defined, understood and accepted by all members? Are they reviewed so they keep on adapting to changing needs?
- Structure: Does it meet the needs of the organization and its members? Is the atmosphere informal, too rigid, or not rigid enough? Are there too many rules and regulations? Too much paperwork?
- Responsibility: When you assign responsibility, do you also provide the tools needed to carry out the job successfully?
- Skills: Are each person's abilities and talents recognized and put to full use? Do people have the opportunity to improve and receive training?
- Norms: Does the organization emphasize a job well done according to recognized standards?
- Conflicting ideas: Do members have the right to express their different points of view without feeling rejected? Are discussions open? Are conflicts solved so that everyone is a winner? Does the team spirit encourage people to offer ideas and venture into unknown territory? The "Conflicts" section explains different types of conflicts and offers ideas for healthy solutions.
- Risk: Does the organization take risks or does it always do the same thing? Are initiative and creativity recognized?
- Motivation: Does the organization aim to motivate members? Is there an attempt to offer members tasks they like doing? Are members told they are important? Do members participate in making decisions that affect them?

- Warm atmosphere: Is there a sense of ownership, cooperation and friendship in the group? Do the members feel confident enough to talk honestly and openly?
- Team spirit: Do members help and support each other? Are members aware of other people's needs? Is there a feeling of belonging to a group and of having a place on the team?
- Reward: Does the organization cultivate an appreciation of work well done? Does the group evaluate these processes and celebrate its successes?

# SELF-HELP GROUPS

Self-help groups are a way for people with similar difficulties to get together, to share and to support each other. By giving a little of themselves, participants help both themselves and others. This makes it easier to cope with the strains and emotional upsets caused by situations such as the death of a loved one, illness, separation or addictions.

Self-help groups can:

- provide personal contact with people who share a similar experience;
- clearly demonstrate to newcomers the various stages and phases of adjustment;
- with greater conviction than anyone else, say to a newcomer: "Yes, you can adjust; yes, you can do it."; and
- become an extension of the member's family, or where family members are non-supportive, it can become a kind of foster family.

Some self-help groups decide to adopt belief statements or guidelines. Here are 10 guidelines that the members of a self-help group collectively agreed on:

1. This self-help group belongs to you and its success rests largely with you.
2. Enter into the discussions enthusiastically.
3. Give freely of your experiences.
4. Confine your discussion to the problem being dealt with.
5. Say what you think.
6. Make sure only one person speaks at a time.
7. Avoid private conversation while someone else is speaking.
8. Be patient with other members.
9. Respect the other person's point of view.
10. Do not break confidentiality. If you do, you will be asked to leave the group.

# STAGES OF GROUP DEVELOPMENT

Developing a strong working group can take several months. This period may be used to discuss complex questions, but it is also important to develop a concrete workplan.

When people work on specific tasks, they often develop the trust and commitment to work with each other, which is necessary if controversial issues arise.

Most groups become productive teams only after they pass through four stages of development. Passing through these stages can be a painful and frustrating experience unless you have thought about them before they happen and recognize them for what they are: growing pains.

At some point, you are likely to go through periods of disagreements among members, of feeling like the group is at a standstill, or of thinking that some members are trying to take over! It's perfectly normal. Don't be discouraged! Instead, be ready.

The main stages of group development can be summarized in four words*:

- Forming: Orientation to the work to be done. Individuals are testing the rules and feeling dependent on the leader.
- Storming: Group members respond emotionally to the task demands placed upon them and conflict/hostility emerges within the group.
- Norming: People feel comfortable expressing their own opinions and the group seems to develop a sense of cohesion.
- Performing: Solutions begin to emerge and people start to feel more interdependent. In this phase the group produces results.

It is important to know how to recognize conflict situations and to be prepared to resolve them.

If a group realizes and prepares for the fact that there will sometimes be difficult situations to deal with, then members will be in a better position to solve problems quickly and creatively (See "Conflict resolution").

*** CREDIT:** *Leadership: Skills Program for Management Volunteers*, Pitters-Strachan, Dorothy, Fitness Canada, 1986, p. 50.

# III. FACILITATING TOOLS AND TECHNIQUES

The following tools and techniques can be used in various group situations, such as training or self-help groups. Some of these techniques can encourage participation among members during administrative or management meetings.

These tools and techniques are designed to introduce structure to a group, to help develop equality and encourage leadership and responsibility.

They help the group members come together and focus their energy on a shared purpose.

# AFFIRMATIONS

Affirmations are positive statements that can be used to change negative thoughts or patterns of behaviour. Nearly everyone can relate to the idea of an inner voice saying things like:

*"I can't cope with responsibility."*

*"I'm always goofing up."*

*"I'm just not lucky. Everything always goes wrong."*

Affirmations are not used to repress such negative thoughts. Instead, the aim is to help create new possibilities that allow for positive attitudes and behaviour patterns to develop within us.

Affirmations are clear and simple statements expressed as positively as possible in the present tense. Here are some examples:

*"I am able to carry out my responsibilities."*

*"I enjoy doing and being my best."*

*"I am grateful for all that life offers me."*

Saying affirmations is a way to help oneself. They can also be said to others. For instance, during a meeting, each participant could make a positive affirming statement about one other person, such as, "Sarah, I see that you are a strong and capable person."

# BRAINSTORMING

Brainstorming generates many ideas in a short period of time. It is based on the principle that ideas flow when one's imagination is freed. Criticism must be avoided.

Here are the guidelines:

1. Announce the theme and duration of the brainstorming exercise.
2. Remind participants of the following instructions:
   - no criticism – there are no “right” or “wrong” ideas;
   - let your imagination run free – the more ideas there are, and the more varied or even bizarre they are, the better it is; and
   - build on other people’s ideas – feel free to improve on a previous idea.
3. Invite people to express their ideas.
4. One person facilitates the group and another person records the ideas on a flipchart as they are expressed, without interpretation or discussion.
5. At the end of the meeting, you can group together and discuss the best ideas according to the needs of your group.

# BREAKS

A group should never try to meet for more than two hours without a break.

Plan when you will schedule a break and put it on the agenda. Before breaking, let the group know what time you expect to start again. You can say, for example, “We will return from the break in 15 minutes, at 10:30.”

If people don’t come back after the break, don’t be afraid to go and get them, or ask someone to help you. If you need to, turn the lights off in the room where they are gathered. That will get their attention.

# CIRCLING

Simply being heard is an important healing experience and this is the purpose of circling. Circling enables people to open up and share their feelings on a subject without fear of being criticized or judged. Circling also enables the group to concentrate on listening and hearing one another rather than thinking of questions, responses or how the subject relates to one's own experience.

Circling gives each group member a chance to speak without interruption, discussion or feedback. The person speaking can hold an object in her or his hands, such as a feather or a stone, to remind others that only she or he is permitted to speak.

In circling, people speak for as long as they want to. When finished, they may ask for feedback or simply say "pass", handing the circling object to the next person until everyone has spoken.

Circling is a particularly useful technique when the group has entered into a heated discussion, or when a few people are dominating and members are competing to get a chance to speak.

Since circling is not facilitated, the time spent is not easily controlled. Circling is therefore most appropriate in situations where time is not an issue.

# CLOSURE

Closure is a brief group experience that ends any group session. It should be very simple and establish a warm bonded feeling on which members can leave on a positive note. A group hug, a song, a poem or simply holding hands in a circle is a good way to close the group.

# ENERGIZERS

Energizers are short, energetic games that are used to revitalize the group's energy. They release people's playful side and stimulate laughter.

An example of an energizer is the balloon toss. The group stands in a circle and a blue balloon is tossed in the air and the group is asked to keep it afloat with soft, gentle energy.

While people are having fun, a yellow balloon is introduced and the group is asked to keep it afloat with fearful energy. Then a red balloon is introduced and people are asked to keep it afloat with angry energy.

The group will find it challenging and fun to try to manage these three different emotions within the group as they try to keep the balloons afloat.

# EVALUATION

Evaluation is the process of assessing both positive and negative experiences in order to make improvements.

Evaluation usually takes place at the end of a session. It can also be used mid-way to check how things are going.

The three most important questions to ask, verbally or in writing, are:

- What worked well?
- What didn't work so well? And why?
- How could we make improvements?

Please refer to the manual "Evaluating" for more details on the subject.

# FACILITATORS' ROLES

Facilitators fulfil three functions: clarifying content, controlling procedure and facilitating socio-emotional aspects. Here are some details regarding each function:

## Clarifying content

a) Defining: Facilitators must ensure that common objectives are clearly defined. They must make sure that the same words have the same meaning for all members of the group, otherwise they must ask for clarification.

b) Reformulating: Facilitators can reformulate, that is, repeat in other words what participants have said, especially when they appear to be misunderstood by others.

c) Making connections: One of the difficulties of group work is that people tend not to pay attention to what others are saying. Facilitators need to make connections between the various contributions, either themselves, or by having others do so.

d) Summarizing: From time to time, facilitators need to summarize the various ideas put forward or ask the group to help do so. This reflects where the discussion is at and can help reorient it, if needed.

## Controlling

a) Stimulating: Facilitators must encourage everyone to participate. Systematically going around the table is not always recommended: it can create tensions which make it even more difficult for "quiet people" to join in.

   As an alternative, facilitators can choose a moment when quieter participants seem more comfortable or less self-conscious to invite their comments. Such moments often present themselves when the group is most lively. If facilitators are watchful, they will be able to give speaking priority to the people who are least likely to express themselves.

b) Restraining: Some participants speak freely, at length and often. Facilitators need to help them restrain themselves from taking over the conversation. This will be easier to do if facilitators have good interpersonal relations with those participants.

Very often, simply summarizing the person's contribution at an appropriate moment and asking other people for their comments is enough to keep their participation in check. They can also be asked to summarize their thoughts.

To avoid looking at these people, strategically place yourself so that the person is not directly in front of you. Because they are not in the facilitator's line of vision, it is harder for them to get approval to speak and, as a result, they speak less often.

c) Keeping time constraints in mind: Facilitators can ask the group to decide how time will be divided based on the agenda.

   Their job is to remind the group how much time they have so discussions don't get off-track and ideas progress well.

d) Providing speaking time: Usually it is facilitators who give people the floor. This can be done formally, on a regular basis or only for those who ask for it. Facilitators need to be constantly on alert, watching participants and interpreting signs that they wish to speak.

   When the allotted discussion time is coming to an end, they can say "I'll take three more people's comments, then we'll end the discussion." Facilitators can use their speaking priority to re-establish order in cases of temporary disruption.

## Facilitating

a) Greeting: Facilitators can greatly encourage everyone's participation by warmly welcoming each participant. Showing interest in each and every one, whatever his or her status, also gives participants value in the eyes of others.

b) Relaxing: By allowing participants to relax and joke among themselves from time to time, facilitators contribute to group solidarity. Also, breaks in the discussion can ease tensions that may be due to fatigue.

c) Remaining objective: People can get involved in more explosive conflicts and make subjective remarks to others. The role of the facilitator is to cool down the situation by reformulating their words in objective terms.

It is important to make a distinction between the content and its socio-emotional power, thus enabling participants to move beyond the opposition between individuals.

d) Encouraging verbalizing: When the atmosphere is tense, it is a good idea to allow participants to express their feelings.

# FLIPCHART

Visual aids help people learn. Using a flipchart focuses the group's attention. Make sure it is positioned so that everyone can easily see it.

It's important to write clearly, legibly and in large letters. You can use markers of different colours on the same page to help compare and contrast ideas. You should note that dark colours are easier to read from a distance; yellow, red and orange are more difficult.
Used pages can be ripped off, numbered and posted on the wall in a logical order.

Here are some facilitating tips that you can prepare in advance:

- write your text in the order ideas will appear and prepare flipchart pages: Write down the key words of the questions you will be asking the group, leaving room to take down answers (leave some blank pages that you can use as needed);
- write yourself notes with a regular pen that only you can read;
- to help you find an important page quickly, fold over the bottom corner of the page or make a protruding tab by folding masking tape over the edge of the page so it's easy to locate;
- make sure you have enough paper and that your felt pens are in good condition.

# GUIDED IMAGERY

Guided imagery is a group meditation led by one member of the group providing key images and direction for members to explore situations using their own imaginations.

Guided imagery is a way of connecting with our inner resources, intuition and wisdom, enhancing our ability to visualize and imagine different possibilities. It enables the person to integrate deeper knowledge into everyday life, transforming wisdom into action. It helps develop creativity and encourages the use of daydreams and fantasy as positive tools.

When writing a guided imagery, symbolic locations, situations and descriptions should be kept as minimal as possible so they allow the meditators' imaginations a broad scope for self-exploration. For example, rather than saying "you see a woman walking toward you through a field of yellow flowers", it is better to say "you see someone walking toward you."

It is also important to pay attention to your tone of voice, pace and rhythm. Be sure to allow long pauses of silence so that participants can use their imaginations freely.

# ICE-BREAKERS

Ice-breakers are activities that are undertaken near the beginning of a meeting. They give people a chance to get to know each other and to feel comfortable together.

Here are three simple examples:

- give each participant paper and coloured pencils to make his or her own "name tag" by drawing pictures and/or using words;
- go around the table asking each person how he or she feels. This will give you the group's "pulse" and participants will be aware of how others are feeling;
- ask each person to describe his or her mood by choosing a letter, a saying or a number.

Ice-breakers can also be designed to lead into a sensitive or serious group discussion. For example, a group about to discuss violence against women might use an ice-breaking activity where participants are asked a question like "in what situation do you feel most safe?" You can also play a song or read a poem that deals with the subject under discussion.

# LAUGHTER

Laughter releases body tensions and emotional energy. A good bellylaugh is like a massage for the inner body. Introducing humour and laughter into the group can be a profound healing force. At one group session, a member prepared the group for a serious meditation she had recorded on tape. When the group was quiet and relaxed, the tape was played. It consisted of laughter, instead of the expected text. Laughter is contagious. Soon the whole group was laughing heartily.

# LIFE STORIES

Telling life stories is one way to create a very strong group bond among people who will be working together for an extended period of time.

Each member usually has a specified time of at least 15 minutes to tell the story of his or her life.

Someone should be appointed timekeeper to signal to the story-teller when he or she is approaching the end of his or her time period.

## ONE-LINERS

This technique is particularly effective during committee meetings because all members can participate, the group's thinking can be summarized, and the debate can advance rapidly.

The chairperson of a large group might say: "You've been listening for the last half-hour, and I appreciate your patience. Before going on, let's find out what's on your minds. Let's have comments from anyone who wants to speak, but limit yourselves to one sentence."

The one-liner technique lets group members find out what everyone else is thinking. Members get a number of abbreviated opinions instead of one or two long speeches. The one-sentence limit may seem like an imposition, but once the pattern is set, each person will make a point of being clear and concise.

# PAIRING

Pairing consists in forming teams of two people, or pairs.

Some people are not used to speaking in public and are shy when speaking to a group. It is often easier to speak one-on-one and to integrate gradually into the group. This technique allows even shy members to express themselves and still feel connected to the group.

Make sure that work done in pairs is brought back and reported to the group at large.

# PRINCIPLES

Establishing principles for working in a group can prevent conflicts from occurring by facilitating communication and clarifying expectations.

Conflicts can arise when group members make assumptions, such as: "I'm a punctual person, so I assumed everyone else here would be."

Here are some examples of principles groups have made:

"We agree...

... to start and end on time;

... to keep personal issues confidential;

... to share responsibility for setting agendas;

... there will be no smoking while the group meets."

Using a flipchart, record all of the items that group members wish others to honour. Discuss each item and make changes if necessary.

Make sure that members are given the opportunity to disagree. For instance, someone might say: "It's really important for me to smoke when I'm discussing stressful situations in my life."

# REPORTING BACK TO THE GROUP

Reporting is done by individuals, pairs, sub-groups or committees bringing information back to the whole group on what was done apart from the group. Reporting is important to integrate the activities of smaller working groups into the process of the group as a whole.

# RITUALS

A ritual is a concrete action symbolizing an inner or more abstract experience. Rituals empower people. They can be planned or spontaneous.

Rituals can be used to open or close a meeting, to celebrate a special event, or focus energy on an activity requiring extra effort.

Rituals often use objects that have symbolic meaning. Here are some examples of rituals:

- group members sing, pray, hold hands;
- group members bring an object that symbolizes a part of their past they wish to let go. After sharing the ideas and feelings attached to this object, they burn it, bury it or give it away.
- during a conference on networking, the planning committee used the strawberry plant as a symbol. Indeed, this plant uses runners to reproduce, much like people reach out and touch each other. The group planted six strawberry plants at the conference site in a quiet and meditative way, helping them focus on the purpose of their work.

# ROLE PLAYING

In role playing, the facilitator invites the participants to act out the role of an individual in a specific situation. This technique allows participants:

- to feel rather than analyze;
- to understand what motivates behaviour;
- to deal with delicate and taboo subjects;
- to anticipate future situations in a non-threatening context; and
- to practise negotiating and come to terms with adversity and aggressivity.

This is useful when people fear an upcoming encounter, for example, a job interview.

Role playing allows you to rehearse situations, to program your memory with positive approaches to real-life situations and to replace less desirable responses.

The group provides a safe environment for trying out new behaviours before they are tested in crisis or stressful situations.

There are three ways to role play:

- within the whole group;
- several participants observed by the rest of the group; and
- several small teams that work simultaneously.

Participants can be invited to play different roles in the same situation. This helps them understand what other people are experiencing within the same context. The observers watch and listen in order to provide constructive feedback.

# VETO

Veto is a technique used to help the group identify a common issue. After drawing up a list of ideas, each member is asked to eliminate the issues that are of no concern to him or her.

After eliminating these elements from the list, the remaining items will be common to all group members.

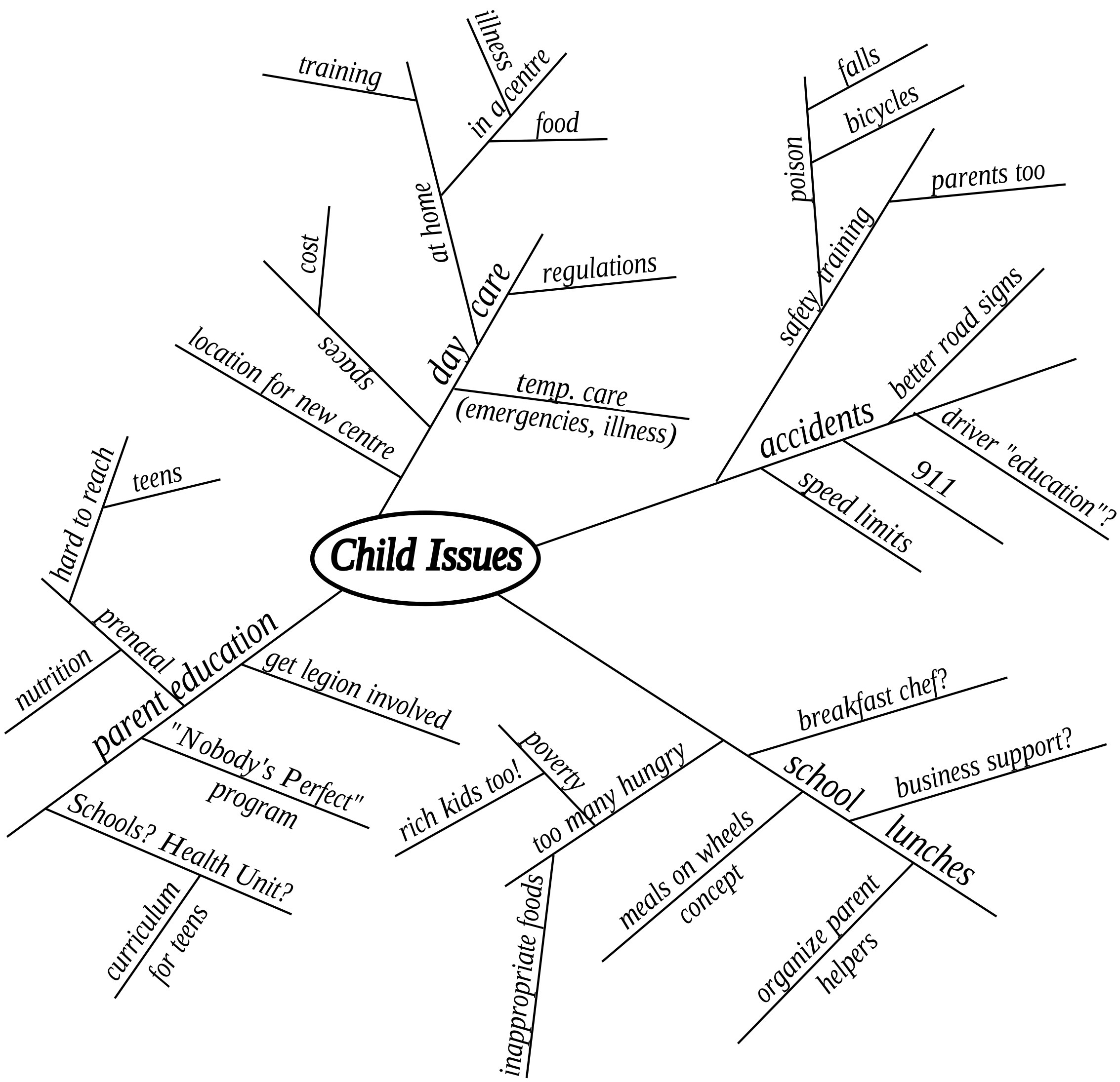
# WEB CHARTS

A web chart is a way of stimulating group discussion. It captures the group's ideas on a given subject in a creative way.

The web chart is like brainstorming, but ideas are recorded differently.

Here is how you do it. First, the topic for discussion is written in a circle in the centre of a large sheet of paper. Key words are written on spokes coming out from the centre recording how one idea led to another in the group discussion. As new areas of discussion emerge, a new spoke is started from the centre topic.

Here is an example of a web chart on the theme of children's issues.




**CREDIT:** *Doing It Ourselves, A Guide for Training Women to Establish Self-Help Groups*, Women Today, Clinton, Ontario, 1988, p. 41.

# IV. ISSUES THAT CONTRIBUTE TO THE SUCCESS OF A COMMUNITY DEVELOPMENT PROJECT

In addition to information on interpersonal issues and facilitating tools and techniques, some other knowledge can be useful for ensuring the success of a community development project.

The following headings should help you do just that.

# EFFECTIVE MEETINGS

Your meetings can be more or less formal, depending on the status of your organization, but they should always aim to be effective. That will allow you to move things forward and keep your members interested.

Here are the necessary ingredients for a successful meeting: an effective chairperson, an agenda, a decision-making process, a well-managed discussion, a time limit and a productive physical set-up. Minutes should be taken if a meeting is to be successful. Here are more details about conducting effective meetings.

## The chairperson

To ensure meetings are effective, the chairperson must:

- know the group members and their expertise;
- plan, prepare and distribute an agenda for the meeting;
- clearly express the goal of the meeting and make sure everyone understands;
- preside at the meeting by following the agenda and encourage all of the members to participate; and
- try to improve the effectiveness of meetings by evaluating them and asking for comments from the group.

## The agenda

The agenda is a step-by-step outline of the subjects to be discussed during a meeting. Everyone attending a meeting should receive a tentative agenda several days in advance. This will :

- remind people there is a meeting;
- ensure that an important subject is not forgotten; and
- give them time to prepare and feel a sense of progress.

This agenda outline is often used:

1. Call to order
2. Approval of the agenda
3. Reading and approval of minutes of the previous meeting
4. Officers' reports (chairperson, secretary, treasurer, etc.)
5. Standing committees' reports
6. Special committees' reports
7. Unfinished or postponed business
8. New business
9. Next agenda
10. Date of next meeting
11. Adjournment

Some agendas are organized on charts. This practical approach gives a global view that makes preparing and conducting a meeting easier.

- The agenda chart includes these elements:
  - name of the committee/ organization;
  - the date, time and place;
  - goal of the meeting;
  - items in order of appearance;
  - person in charge of each item;
  - disposition (do you want to **i**nform the group (I)?, **c**onsult it (C)? or allow it to make a **d**ecision? (D); and
  - time allotted for each item.

Here is an example of this type of agenda. We have also provided a model you can reproduce and use as needed.

Examples to help you understand

Our Society for a World without Violence
Directors' Meeting
January 11, 2002, 8:00 p.m., Room A in the community centre

**AGENDA**

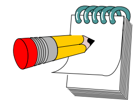
Goals of the meeting:

To decide:

a) how to follow up the survey of women in the community
b) whether to renew the contracts of two employees

| **Items** | **Responsible** | **I - C - D*** | **Resources, material** | **Length** |
|---|---|---|---|---|
| 1. Call to order | Chairperson | | | 1 min. |
| 2. Reading and approval of the agenda | Chairperson | | Tentative agenda | 4 min. |
| 3. Reading and approval of minutes from last meeting | Secretary | D | Minutes | 5 min. |
| 4. Review of evaluation questionnaires | Joan C. | I-D | Questionnaires and summaries | 45 min. |
| 5. Contract renewals | Vice-chairperson | D | Contracts and job descriptions | 30 min. |
| 6. Agenda for the next meeting | Chairperson | | | 5 min. |
| 7. Date, time and place of the next meeting | Chairperson | | | 1 min. |
| 8. Adjournment: 10:00 p.m. | | | | |

* I: Inform C: Consult D: Decide



Organization:

Committee:

Date:

Time:

Place:

Goal(s) of the meeting:

## AGENDA

| **Articles** | **Responsible** | **I - C - D** | **Resources, material** | **Length** |
|---|---|---|---|---|
| | | | | |

### Decision-making process

Establishing the purpose and agenda of a meeting is often easier than making decisions. Since there will be decisions to make at every meeting you attend, it is worthwhile to spend a few minutes looking at how groups make decisions. Here are the steps:

1. Define the problem. In some discussions, there may be more than one problem to solve. Issues must be clearly defined and separated.
2. Ask for alternatives. Members will offer suggestions. They should all be accepted without criticism by the group.
3. Analyze the ideas. As a group, explore the pros and cons of each idea. Answer the question, "What are the advantages and disadvantages of each alternative?" This may require more knowledge than the members possess at the time of the meeting.
4. Choose the most appropriate solution after exploring the advantages and disadvantages of each. Choosing a solution can be done by voting, either by secret or public ballot. It can also be done by consensus, and can involve modifying the chosen solution to satisfy all of the members. It is important for each member of the group to have an opportunity to participate in decision making. If not, implementing the decision will be difficult.
5. Evaluate the outcome. This is usually done once an action has been implemented. It can be done through a discussion or a report by one member.

The ability to make and implement decisions is a sign of a productive and motivated group.

### Well-managed discussions

Well-managed group discussions allow members to have input and feel that their participation is important. The key to successful meetings is involving people. Certain techniques favour group participation. Please consult the heading "Facilitating tools and techniques", and particularly these elements: brainstorming, evaluation, flipcharts, veto.

### Time limits

How many people lose their motivation because meetings seem to go on forever?

It is of utmost importance to start on time if you want to attain your objectives in the allotted time. Think about this: If you multiply each minute spent waiting for a latecomer by the number of people waiting, you will understand how much time the group is wasting.

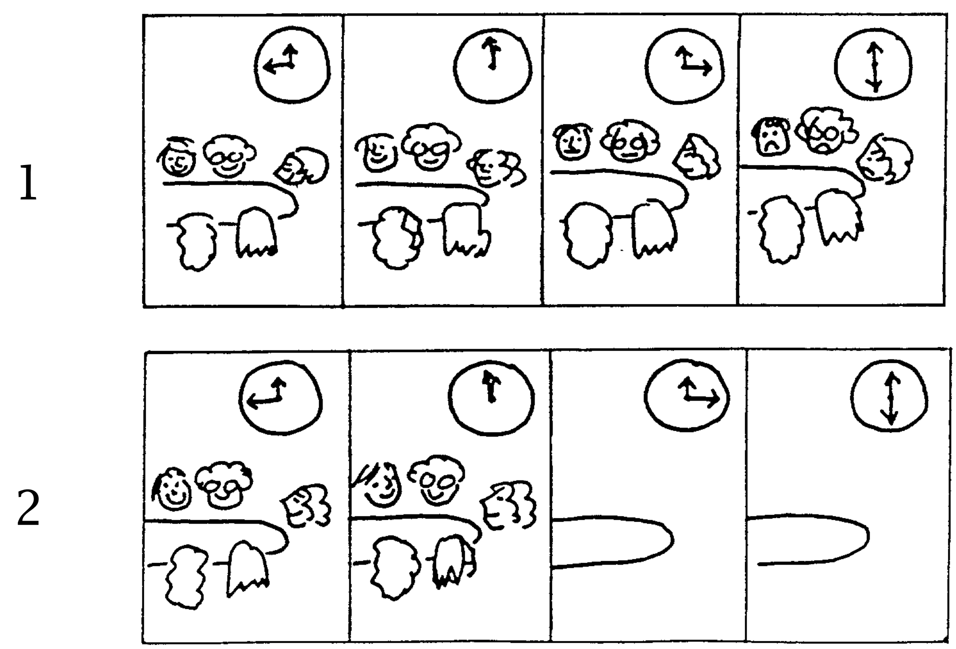
You must decide how long the meeting will be, and allocate a fixed time for each item on the agenda.

It is not easy to predict the amount of time it will take to deal with an item on the agenda. Yet, it is better to miscalculate than lose control of the events. You will gain experience and do better next time!

When you take too much time for one item, you have to cut time somewhere else, or postpone an item until the next meeting. All of the participants must agree with the decision, and be aware of the consequences.

Finally, in order to respect the time limits of the meeting, you can appoint a timekeeper. Members can take turns assuming this role.

Compare the two situations depicted in these cartoons. Which one do you prefer?




**CREDIT:** *Working Collectively*, The Women's Self-help Network. Ptarmigan Press Ltd., Campbell River, B.C., 1984. (Reprinted 1993), pp. 24-25.

## Productive physical set-up

All of your best planning efforts can be wasted if you forget about the physical setting. A seating arrangement where everyone can see each other and the flipchart (if needed) is of prime importance.

Check the lighting, the size of the room, the acoustics, the temperature, ventilation, the comfort and position of the seating, coat racks, rest rooms and parking.

You also have to organize writing materials, name tags, refreshments and audiovisual equipment, including extension cords and outlets.

## Minutes

A secretary should take notes during a meeting and use them to prepare the minutes. This document has several uses:

- to provide a record of the meeting's proceedings;
- to keep track of progress;
- to inform absent members;
- to help orient new members of the committee or organization; and
- to provide a useful guide for evaluating the work done.

Minutes should be as brief as possible, yet still maintain their accuracy. The items in the minutes should be numbered, in the same way as in the agenda. The agenda can then be attached to the minutes, and filed.

Minutes should include:

1. The name of the organization/ committee.
2. When and where it met.
3. Who chaired the meeting and who was present (it is sometimes easier to record who was absent).
4. Adoption of the last meeting's minutes.
5. The matters discussed and any decisions that were made. Who made the motions, and if they were carried or defeated.
6. Agenda items for the next meeting. This could include unfinished business or assignments given to individuals or sub-committees.
7. The time and place of the next meeting.
8. The secretary's and chairperson's signatures.

Following is an example of minutes:

## Minutes of Our Society for a World without Violence

*January 11, 2002, 8:00 p.m., Room A in the community centre*

1. The meeting was called to order by the Chairperson, Ms. A, who wished a "Happy New Year" to everyone. (Absent with notification, Mr. B.).
2. Agenda accepted as proposed.
3. Minutes of the December 10, 2001 meeting were read, corrected and accepted.
4. According to the information provided by Joan C., the survey questionnaires distributed to the women in the community show that:...
   Ms. D. proposed setting up a sub-committee to discuss issues regarding single mothers in the community who are under age 20. Its mandate would be to identify concrete means of helping them as of June 2002.
   After a discussion, the committee asked Ms. D. to draw up a workplan and present it at the next meeting. She will collaborate with Joan C.
5. Contract renewals. The chairperson announced the contracts of two employees, Mr. E. and Ms. F., would run out in three months, and asked if they should be renewed.
   After reading the job descriptions, the employees' evaluation files and their boss's recommendations, the committee decided to renew these employees' contracts. A grant from...to finance the projects they are working on will cover their salaries.
6. Agenda of the next meeting:
   a) Ms. D.'s report on helping single mothers
   b) financing needs for 2003
   c) committee report on education
7. Next meeting:
   February 13, 2002 at 8:00 p.m., in Room B in the community centre
8. Meeting adjourned at 9:50 p.m.

____________________ ____________________

Chairperson Secretary

# GROUP INCORPORATION

Incorporation (also called registration as a society) is somewhat equivalent to an organization's birth certificate. The government publicly recognizes its existence through letters of patent (or a charter).

Not all organizations need this. Some small organizations aren't permanent or wish to maintain as flexible a structure as possible.

Many do not approve of conventional organization with a board of directors, standing committees, etc. Rather, everyone joins in and shares responsibilities equally. They prefer when a "collective" sense prevails.

However, it is recommended to incorporate an organization that has heavy financial and professional responsibilities and that hires staff. Incorporation protects the public as well as organization members, the board and personnel.

Incorporation helps a community group commit itself (legally) to written objectives. Incorporation has the advantage of:

- facilitating the search for funding: Most foundations and government sources of funding for societies and their programs require that a society be incorporated;
- securing your society's name;
- creating an image of stability and responsibility because of the requirements of incorporation;
- protecting members who cannot then be held liable for the corporation's debts;
- making it possible to hold title to property and to contract in the society's name;
- enabling the organization's employees to be contracted in the name of the society rather than as individuals;
- making it easier to borrow money: In general, financial institutions will not lend money to unregistered groups unless individual members guarantee the loan;
- setting up order and board procedure and good businesslike practices;

- beginning a history of your society: Incorporation requirements give the organization the incentive to keep records, thus making it more permanent. For instance, an annual report is filed each year with details on changes within the group; and
- making your organization eligible for registration as a charity with Revenue Canada.

You may incorporate your organization at any point in its existence. To do so, you have to complete forms, provide the appropriate documents and pay a fee to the ministry responsible for incorporations in your province or territory.

You can find the number in the blue pages of the telephone directory for further information.

# GROUP REGISTRATION AS A CHARITABLE ORGANIZATION WITH REVENUE CANADA

Revenue Canada reserves registration numbers for organizations whose resources are devoted to charitable works.

To be eligible for registration, an organization must be exclusively interested in:

- the relief of poverty;
- the advancement of religion;
- the advancement of education; and
- other charities benefiting the community as a whole.

The registration number allows you to:

- be exempt from taxation;
- issue charity receipts;
- be eligible for tax rebates and exemptions; and
- receive charitable grants from foundations.

You can obtain an information pamphlet and the registration form from Revenue Canada by dialing the toll-free number 1-800-267-2384.

You also have to register with your provincial or territorial government to benefit from the same advantages at those levels of government. You can find the phone number for further information on the subject in the blue pages of the telephone directory.

# INTERVIEWS

## Description

An interview is a versatile information-gathering technique. It is based on an individual's verbal comments. Interviews differ from ordinary conversation because they have specific objectives.

Interviews may be carried out in several ways: in person, by telephone, individually or in a group. No one way is better than the other. The method you use depends on your situation, assessed in terms of costs and benefits.

The following are the advantages and disadvantages of using interviews to gather information:

| Advantages | Disadvantages |
|---|---|
| • People usually answer all of the questions asked in an interview.<br>• Interviews allow evaluators to get further details on answers and ask for explanations.<br>• In an interview, you can use pictures, charts, etc.<br>• Interviews are effective for measuring attitudes and beliefs.<br>• Interviewing a large number of people provides very reliable results. | • Interviews can be expensive and time consuming.<br>• Some people may feel less comfortable being interviewed than answering a written questionnaire.<br>• It is difficult to ensure that information remains anonymous in an interview.<br>• The interviewer may influence the answers.<br>• If you don't interview enough people, your answers may not be reliable. |

## Important points about interviews

To compare the information gathered, it is important that:

- the interview questions be clear and simple. To help you, look at the sections "Questions" and "Questionnaires";
- the questions be determined beforehand;
- the same questions be asked to all respondents;
- interviews be conducted in similar circumstances; and
- the amount of information gathered not be more than what you can realistically analyse.

Here are a few tips that should help you prepare and conduct an interview.

### Before you begin

Before conducting an interview, it is recommended that you:

- test the interview several times with a variety of people so you can adjust to your clientele; and
- try to get some background information on your respondent. It will help break the ice during your introduction;
- tell the person how much time you think it will take;
- make sure the person knows if he or she chooses not to be interviewed, it will not affect the service he or she receives in any way;
- make arrangements to interview the person alone;
- plan to tape record the person's answers (if he or she accepts) or be prepared to take short, clear notes;
- prepare an interview guide or photocopy the one provided on page 73. Keep it handy so you can consult it easily. Read it over beforehand so you are familiar with it;
- decide on the code name or number to be used for each person interviewed, to keep the information confidential;
- make sure you have everything you need to conduct the interview: paper, pen or pencil(s), water pitcher, glasses, cups of tea, etc.; and
- choose a cheery, comfortable location for the interview.

## As you begin

It is very important that the person being interviewed feels he or she can trust you. The first five minutes of a meeting are crucial and so is the kind of relationship that is established. To create a trusting atmosphere:

- greet your respondent and thank him or her for coming;
- stress that the interview is confidential. Explain how you will protect the person's privacy;
- introduce yourself and the project;
- tell the respondent how much time the interview will take;
- explain how you will use the information gathered in the interview;
- be sincere; and
- ask your respondent for the personal background information you need for your files. Do not write this information on the top of the interview form or on interview notes. Write it on another piece of paper. Later, transfer the information on a master list that will be kept in a safe place. Then, always use the code so as to respect the respondents' anonymity.

## During the interview

Pay attention to these aspects during the interview:

- remember, your job is **not** to record **your opinion** of what the respondent says, but to write down his or her actual words as much as possible. Avoid influencing responses;
- listen carefully. Follow the respondent's lead, but do not wander off on another topic, or stay there very long. At times you may have to say, "That's an interesting point, but let's get back to...";
- if respondents do not want to discuss a certain topic or question, don't push;
- look for body language to see if the respondent is comfortable. If he or she appears uncomfortable, move on to another subject;
- don't be afraid of silence. Wait for the respondent to speak. Often what follows silence is very important;
- get further details by using more questions and asking for explanations. You could say, "Could you tell me more about that?" or "What exactly do you mean?"; and

- thank respondents for their time, for the information they provided, and for agreeing to be interviewed.

## After the interview

Your work is not over when the interviewee leaves. You still need to:

- rewrite or type your interview notes as soon as possible after the interview, preferably on the same day. The longer you wait, the more you are likely to forget;
- file the interview;
- send a thank-you note to the respondent; and
- compile the results.

## Interview guide

A. Greet the respondent.

- Thank him or her for coming.
- Mention confidentiality.
- Introduce yourself and the project.
- Ask for permission to use a tape recorder.

B. Complete the identification file.

C. Ask the questions. (Before the interview, it is a good idea to write down the questions and number them.)

D. Thank the respondent.

**Interview** **Code** ________

## Identification file

Name: ______________________________

Address: ______________________________

______________________________

Telephone number: ________________________

Sex: ❑ Male ❑ Female

Age: ❑ 18 to 24 ❑ 25 to 34
❑ 35 to 44 ❑ 45 to 54
❑ 55 to 64 ❑ over 65

Occupation: ______________________________

Status: ______________________________

Nation: ______________________________

Link with the program: ______________________________
(User, staff, volunteer, etc.)

Other relevant information: ______________________________

______________________________

______________________________

________________ ______________________________
Date: Interviewer

Note: This information is confidential. Keep it in a safe place.
Use only the code number.

## How to conduct an interview

Below is a list of the various tasks involved in conducting an interview. Check them off as you do them.

**Before the interview**

- ❑ 1. Prepare your interview guide.
- ❑ 2. Write a brief description of yourself and your project.
- ❑ 3. Choose a code name or number to identify your respondent.
- ❑ 4. Get background information on your respondent.

**Interview day**

- ❑ 5. Prepare all the material you will need.
- ❑ 6. Set up the interview location.
- ❑ 7. Interview your respondent.
- ❑ 8. Rewrite or type your interview notes.
- ❑ 9. File the notes in an appropriate place.

**After the interview**

- ❑ 10. Write a thank-you note to your respondent.
- ❑ 11. Compile the answers.

# MINUTES

Please consult the heading "Effective meetings".

# ORGANIZATIONAL STRUCTURE

### Formal and informal structure

There isn't **one right way** to structure a group. Some groups avoid structure by doing things as simply as possible. They operate informally with no chairperson or leader to run their meetings, they don't keep written records of their meetings and they don't worry about who attends meetings or how often.

Other groups are so formally structured that every rule and decision is written down and constantly checked.

Lack of structure can slow your group down and keep it from reaching its goals. But on the other hand, too much structure can make your group waste an incredible amount of time ensuring meetings are run the way they should be.

There are no rules about the type of structure you should adopt. A good guideline is to involve all group members in choosing the type of structure that best suits your needs. Your group's structure needs to reflect the nature of your group and its goals.

Here is some information about formal structures. It can help you decide how to structure your group.

Organizational structures can be defined based on two facets: people, and statutes and regulations.

## People

**Members** are the most important element of an organization. The organization exists to respond to their needs. Members are responsible for naming an executive committee and other committee chairpeople. An organization's strength lies in the way it uses its members' skills.

The **executive committee** is elected (or named) from among the members of the organization. It serves to guide members and help them attain their objectives. It is composed of a chairperson, a vice-chairperson and a secretary-treasurer.

**Committees** can be standing or temporary depending on the goals they are pursuing. You will find more information on committees in the "Making It Happen" manual.

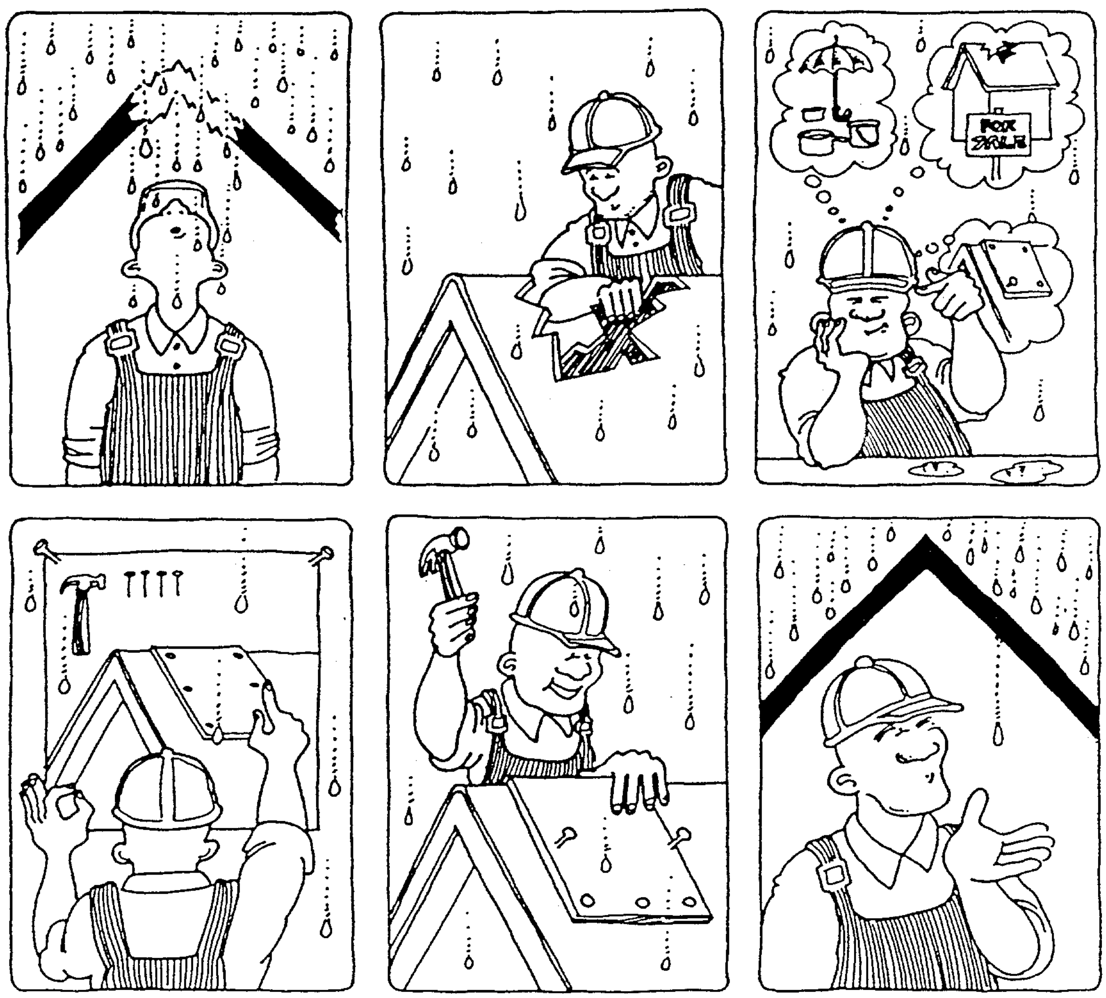
The **board of directors** is composed of members who advise the organization on policy, direct current operations and maintain links with the public.

# PROBLEM SOLVING

All groups have problems. And thanks to problem solving, they can study problems that have complex solutions. For example: “How can we meet the community’s need for information on sexually transmitted diseases?”

Problem solving is a six-step process (it is very similar to the conflict resolution process described under the heading “Conflict resolution”).

Here are the steps and questions to help you use problem solving in your group.



**CREDIT:** *Leadership, Skills Program for Management Volunteers*, Pitters-Strachan, Dorothy, Fitness Canada, 1986, p. 102.

1. Recognizing and defining the problem

- What are the symptoms?
- When were they displayed for the first time?
- What happened before?
- What events illustrate the problem?
- What exactly is the problem?
- How does it affect our organization?

2. Analysing and specifying the problem

- Who thinks this situation is a problem? Why?
- Who is affected by this problem?
- How are they affected?
- What changes do we want to bring about?
- Who has the power to bring about these changes?
- What are our assets?
- Is there anything that could stand in the way of beneficial change?

3. Identifying alternative solutions

- What are all of the solutions that could help solve this problem? (If needed, organize a brainstorming session, described under the heading "Brainstorming".)

4. Choosing a solution

- How can we be sure our solution is providing the desired results?
- How does each solution compare to its criteria for success?
- What is the best solution for solving the problem and for the group?

5. Implementing the chosen solution

- What concrete action do we have to take?
- What major obstacles do we have to surmount?
- Who will do what, when and how?

6. Evaluating the solution

- What have we done to solve the initial problem?
- How can we tangibly measure our level of success?

Your group will be stronger and more effective if all members help to identify the problem and find appropriate solutions.

# QUESTIONNAIRES

## Description

A questionnaire is a tool for gathering information on facts, opinions, expectations, beliefs or attitudes.

A questionnaire is a form which ensures that the same questions are asked of all respondents so that the answers can be compiled or compared with each other.

A questionnaire is prepared with specific objectives in mind, most often to get answers to questions that have remained unanswered.

Questions must be prepared in advance. The order they will be asked must also be determined ahead of time.

These are the advantages and disadvantages of using questionnaires to gather information:

| Advantages | Disadvantages |
|---|---|
| • Questionnaires provide a lot of information quickly from many people.<br>• They are easy to use.<br>• They keep information anonymous.<br>• Everyone answers exactly the same questions.<br>• Questionnaires are less expensive than interviews.<br>• They are not as stressful for respondents as interviews. | • The usefulness of questionnaires is limited by the respondent's ability to read and write.<br>• People do not always complete questionnaires and return them.<br>• Evaluators cannot get further details on answers or ask for explanations.<br>• Questionnaires can take a lot of time to prepare.<br>• The number of questions to be answered needs to be limited. |

## Developing the questionnaire

Developing the questionnaire requires a great deal of preparation. We propose the following simple, three-step working method:

1. preparing the first draft
2. conducting a “pilot test”
3. drafting the final version.

### 1. Preparing the first draft

When drafting a questionnaire, it is important to think about: a) what it contains (the questions) and b) what it looks like (the presentation).

*a) The questions*

Think about the following details when preparing your questionnaire.

- The language used in your questionnaire must be clear and simple. Sentences must not be too long.
- Do not try to focus on too many subjects at once. Stick to key themes.
- The amount of information gathered through your questionnaire must not exceed what you can realistically analyse. Too much information can become confusing and hard to handle.
- Give clear, simple and precise instructions on how to respond. If possible, provide a sample answer at the beginning of the questionnaire.
- If your questions are well formulated, you have a better chance of getting answers that are valid and interesting for your research.

The "Questions" section, on page 85, presents different types of questions and provides examples.

*b) The presentation*

The first draft must look like an actual questionnaire. Here is some advice on how to prepare it.

Your questionnaire should include a short introduction, perhaps in letter form. This introduction would include:

- the reasons for the questionnaire and how the answers will be used;
- why it is important to take the time to answer the questionnaire;

- the fact that the information gathered will be kept confidential; and
- the deadline for returning the completed questionnaire.

It is important to pay particular attention to the questionnaire's presentation (what it looks like). It should be:

- easy to read (good layout); and
- attractive, clear and easy to handle.

The questionnaire should end by thanking the respondents for their time and help.

**2. Conducting a "pilot test"**

The pilot test is the trial version of the questionnaire. It is used to check whether:

- the wording used is understood by the respondents;
- the questions asked are clear; and
- all important details have been included.

Here are three important points about the pilot test:

- the questionnaire should be tested with at least three or four people;
- these people should have the same characteristics as the people who will be asked to complete the final version of the questionnaire; and
- they should not be the people who will be asked to complete the questionnaire.

**3. Drafting the final version**

The final version of the questionnaire must be prepared very carefully. It must take into account any suggestions raised during the pilot test. No changes should be made after the final version has been drafted.

The organization “Parents and Children” wishes to know more about the habits of children between 0 and 6 years of age in its community. The leaders decided that they would get information by giving a questionnaire to mothers and day-care workers.

The committee members prepared a questionnaire using the following steps:

1. They prepared the first draft of the questionnaire using both closed and open-ended questions. They worked on the layout of the document.

   They included a short letter or introduction explaining the purpose of the questionnaire. They ended by thanking respondents.

2. Before sending the questionnaire into the community, they asked three mothers of children 0 to 6 years old and at least one day-care worker to answer the questionnaire. They then met with these people to get their comments on the questionnaire. They asked questions such as:

   - Were any important details left out?
   - Did you have any difficulty understanding the wording?
   - What do you think about the layout?
   - How could the questionnaire be improved?

   They were aware that this step would require some time. However, it gave them added confidence that the final questionnaire would be easy to understand and would not fail in its objective.

3. They then prepared the final version of the questionnaire taking into account the comments that came out of the pilot test.

   The “Parents and Children” leaders finally distributed their questionnaire in the community, not giving it to the people who had participated in the pilot test.

## About the questionnaire

Here are some things to consider regarding the questionnaire.

- It is important that people be interested in the goals of your questionnaire if you want to get good answers.
- The questionnaire may be given in person or in groups, or sent to respondents by mail.
- When mailing out the questionnaire, it is important to include a pre-addressed, stamped envelope and to specify the deadline for receiving the completed questionnaire.
- Sending the questionnaire by mail allows you to reach more people, but you have no control over whether they return the completed questionnaires.
- Handing out the questionnaires in person and collecting them yourself requires a bit more work. However, it gives you better control over getting them back.

# QUESTIONS

### Type of information collected

It is important that the questions used to gather information be carefully prepared. They may deal with one or more of the following issues:

- facts:
  - about a person (age, sex, occupation, nation, etc.)
  - about his or her environment (place of birth, place of residence, etc.);
- opinions, expectations, beliefs; and
- attitudes and reasons for doing certain things.

### Characteristics

The questions must be:

1. **Clear and simple**. The wording should be easy to understand. The vocabulary used should be adapted to those questioned. Each question must contain only one idea, and be as short as possible.
2. **Relevant.** Respondents must have the necessary information. They must be able to answer the questions easily.
3. **Neutral.** The way the questions are formulated must not influence the answer.

Generally speaking, there are three types of questions: open-ended questions, closed questions and semi-open questions.

### Open-ended questions

Open-ended questions do not offer predetermined answers. They can be answered by descriptions and opinions, using any words the respondent wants.

Here are some examples of open-ended questions.

1. How has the program helped you?

________________________________________

________________________________________

2. What is the best thing about the program?

________________________________________

________________________________________

## Closed questions

Closed questions have a predetermined choice of answers. They provide two or more possibilities from which the respondent must choose.

Closed questions can be subdivided into several types. Below are examples of three types of closed questions:

- yes or no
- multiple choice
- scales.

## Yes or No

| | | |
|---|---|---|
| 1. Have you found the program useful? | ☐ Yes | ☐ No |
| 2. Has the program affected your life? | ☐ Yes | ☐ No |
| 3. If so, did it have a: | | |
| a) positive effect? | ☐ Yes | ☐ No |
| b) negative effect? | ☐ Yes | ☐ No |

## Multiple choice

In your opinion, what is the program's greatest strength?

- ☐ its activities
- ☐ its cost
- ☐ its timetable
- ☐ its staff

## Scales

When measuring a person or group's views or opinions, you may wish to use a rating system. Scales may measure:

- frequency
- degree of satisfaction
- opinion.

Here are some examples.

*Frequency*

Please indicate how frequently you participated in the program's activities.

- ☐ Always
- ☐ Once a week
- ☐ Once a month
- ☐ Once a year
- ☐ Never
- ☐ No answer

*Degree of satisfaction*

For each program activity, please indicate how satisfied you were.

- ☐ Very satisfied
- ☐ Satisfied
- ☐ Dissatisfied
- ☐ Very dissatisfied
- ☐ No answer

*Opinion*

To answer the following questions, please circle the number that best corresponds to your choice:

3. Totally agree
2. Partially agree
1. Partially disagree
0. Totally disagree

| | | | | | |
|---|---|---|---|---|---|
| a. | The program's activities were stimulating. | 0 | 1 | 2 | 3 |
| b. | I felt at ease during the program. | 0 | 1 | 2 | 3 |
| c. | The atmosphere in the meetings was friendly. | 0 | 1 | 2 | 3 |
| d. | I would recommend this program. | 0 | 1 | 2 | 3 |

Using rating systems makes it easier to compile opinion-related information.

## Semi-open questions

Semi-open questions are a mixture of closed and open-ended questions. One part of the answer is predetermined, but the respondent may also give further details in the space provided for that purpose.

Here is an example:

Did the physical layout of the premises (lighting and ventilation) create a pleasant atmosphere?

☐ Yes ☐ No

Why or why not? ______________________________

______________________________

# RESPONSIBILITIES OF ORGANIZATION MANAGERS

### Responsibilities of the chairperson

The chairperson should be interested in and capable of working with others. He or she must be organized, and know how to organize. He or she must be able to motivate the members to work.

The responsibilities include:

- presiding over meetings, maintaining order and ensuring the meetings move ahead;
- establishing the agenda, and making sure it is respected by restricting discussion to relevant issues;
- calling meetings to order on time and adjourning them on time;
- being familiar with the procedural code for meetings;
- being aware of priorities and organizing the schedule accordingly;
- being willing to represent the organization;
- avoiding imposing one's own opinions as chairperson; and
- delegating responsibilites and powers.

### Responsibilities of the vice-chairperson

- familiarizing oneself with the chairperson's duties and replacing him or her when needed; and
- helping the chairperson fulfil his or her duties when possible.

### Responsibilities of the secretary

- providing a record of each meeting and having it approved during the next meeting;
- dealing with the organization's correspondence and providing a synopsis during meetings; and
- being ready to recommend possible follow-ups, based on knowledge of documents, correspondence, etc.

**Responsibilities of the treasurer**

- collecting required sums of money and providing receipts when necessary;
- informing members of the invoices that have been paid, the expenses and the money that has come in (with a special emphasis on large sums); and
- when necessary, giving an overview of the organization's financial health.

# RESPONSIBILITIES OF THE MEMBERS

Just as the managers have specific duties and responsibilities, members have obligations toward themselves and their organization. Members are expected:

- to be punctual for meetings;
- to regularly attend meetings so they are well informed about what is going on;
- to familiarize themselves with the procedures of meetings and to respect the regulations;
- to advance the discussion by not, for example, repeating opinions and examples that were already given;
- to understand each motion before it is voted on; and
- to accept volunteer work.

# SETTING PRIORITIES

A priority is a concern or a problem that must be considered and resolved before all others.

The group must establish priorities when there is a choice to be made between several processes or questions.

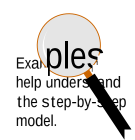
How do you decide what is a priority for people in a group and what is not? Here is one way to do it:

1. After having discussed the subject, tell the group it is going to set priorities.
2. Ask participants to contribute ideas as they come into their heads. Record all of them on a flipchart.
3. Ask people to list their top five priorities on a piece of paper.
4. Ask each person to award points to their priorities: the top priority gets five points, and the lowest, one.
5. Record the number of points participants gave to each of the priorities indicated on the flipchart.
6. Tally the total points for each item. The one that gets the most points becomes the group priority.

Below is an example of a list of nine priorities drawn up by a group of four people. On the next page you have a blank model of a priority-setting chart.

**PRIORITY-SETTING CHART**

| Priorities Expressed | Rating | Total |
|---|---|---|
| Priority A | 2 | 2 |
| Priority B | 1,5 | 6 |
| Priority C | 4,5,2 | 11 |
| Priority D | 1 | 1 |
| Priority E | 2,3 | 5 |
| Priority F | 3,4,5 | 12 |
| Priority G | 3,3,4,5 | 15 |
| Priority H | 1,2,4 | 7 |
| Priority I | 1 | 1 |



In this example, the group's five priorities, in decreasing order, are:

1. priority G with 15 points
2. priority F with 12 points
3. priority C with 11 points
4. priority H with 7 points
5. priority B with 6 points

The group can then decide if it wants to tackle only the most important group priority or if it wants to have several priorities on the go at the same time.

If all of the members play a role in determining the needs that must be addressed, their commitment will be stronger and the priorities will reflect the direction of the group.

**Priority-setting Chart**

| Priorities Expressed | Rating | Total |
|---|---|---|
| | | |