Facilitative agenda

Annual Meeting mini-training

**ROC and ROLE – What’s yours?**

Time: 20 minutes

Goal: Examine the rights and obligations that members have in their ROC, strengthen knowledge about the community’s bylaws, and familiarize (or re-familiarize) members with the responsibilities of all members.

Prizes for the correct answer: ROC-NH hat, tee shirt or magnet.

As answers are provided by members or given by ROC-NH, follow up with the membership with questions to further discussion, like:

- Why are member responsibilities important to a community?
- How is this answer surprising to you?
- What more do you know about this?

Welcome: Trainer introduces self and thanks everyone for taking a few minutes.

Trainer asks: How many people have a copy of the current bylaws? Note number of hands raised.

Why is this document important? - solicit input. Note it is the document that governs how the corporation will conduct business and all members and board members must comply with the bylaws.

It also describes the vital role of members in the ROC. It highlights the unique rights of members, and the bylaws also outline the obligations and responsibilities.

Trainer explains: I will ask a series of questions and first one to respond correctly may get a prize.

Trainer asks a question, solicits response, and follows up with discussion question(s). e.g. Why are member responsibilities important to a community?
Review as many questions as time allows. Focus on brief discussion of each question. Give away swag. Thank everyone for their time at the end and promote ROC-NH ability to provide additional training to BOD and members.

1. Members of our co-op are expected to accept which of the following responsibilities:
   a) Voluntarily participate in the governance of the co-op
   b) Voluntarily participate in the operation of the community
   c) Attend annual and membership meetings
   d) All of the above

2. A Member must be in good standing in order to have voting rights and privileges.
   True or False

3. The Board of Directors meets monthly in private meetings, where no other members attend
   True or False

4. The Community Rules of the co-op are decided on, and voted upon by:
   a) The Co-op’s attorney
   b) The Board of Directors
   c) The Members of the Co-op
   d) The President of the Board of Directors

5. As a Member of this community, as long as I pay my lot rent, and I am in compliance with the Occupancy Agreement, Bylaws and Rules – I have the right to occupy a lot:
   a) Until the mortgage is paid on my home
   b) Perpetually (forever)
   c) Conditionally if someone else doesn’t buy the co-op
   d) Until the current Board of Directors is replaced
6. As a Member, I am committing to participate in the community. The following opportunities are available:

a) A position on the Board of Directors  
b) Joining a committee that the Board has established  
c) Organizing or assisting with a community Clean-Up Day  
d) Coordinating refreshments at the next Annual Meeting  
e) Helping to deliver correspondence to members’ homes  
f) _______________________________  
g) _______________________________  
h) All of the above  

7. It is possible that the lot rent can be increased. As a Member I have the right to:

a) Review the annual budget and understand why the increase is needed  
b) Receive a written notice, providing me with a 60-day notice  
c) Refuse to pay the increase  
d) All of the above  
e) Both a. and b. above  

8. The Board is required to give me notice about Membership meetings not less than 5-days prior to the meeting.  
   True or False  

9. In order to serve on the Board of Directors, the following qualification must be met:

a) Must be a member in good standing  
b) Must have the educational qualifications  
c) Must own a home in the community  
d) Must have experience serving on another board  
e) Both a and c  
f) All of the above  

10. The following are owners of our community:

a) The Community Loan Fund  
b) The Management Company  
c) Members  

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d) The Bank
e) All of the above
Facilitative agenda

Annual Meeting mini-training

**Think you know about serving as a Board Member? Think again!**

Time: 15 minutes

Goal: to promote the consideration of serving on the BOD. Explain to members that there are positions up for election, and this exercise may help enlighten the membership about serving the community as a board member.

Prizes for the correct answer: ROC-NH hat, tee shirt or magnet.

As answers are provided by members or given by ROC-NH, follow up with the membership with questions to further discussion, like:

- How is this surprising to you?
- What more do you know about this?
- Why is this important to your community?

**True or False**

To serve as an effective Board Member, you must commit to attending about 10 hours of meetings during the month.

*Answer: False.* The board meets for about 2 hours a month to conduct their business. There may be occasional works sessions throughout the year, but it is rare.

**Multiple Choice**

The President of the Board is responsible for the following:

- A. Presides at all meetings of the board and the membership
- B. Acts as one of the signing directors for the co-op on legal documents and contracts
- C. Has the final say on all board issues
- D. All of the above
- E. Both A and B
**Answer: E. Both A and B.** The President is part of a team of 5 and all decisions are made with consensus and voting, and the president has 1 of 5 votes.

**True or False**

The Treasurer of the Board is responsible overseeing Annual tasks and all financial activities that occur in the community and should not shirk responsibility by delegating tasks to others.

**Answer: False.** The Treasurer of the board often has a finance committee to help with budgeting and financial reporting. In most co-ops, the financial management is done by a contracted bookkeeper or property management company – and the Treasurer provides oversight for those activities.

**Multiple Choice**

Serving on a co-op’s Board of Directors is rewarding and a smart choice because:

A. You will build your personal resume by including your leadership position in the community
B. You will become educated about running a corporation: compliance, laws, governance and finance.
C. You will learn new skills through training with ROC-NH
D. You will express yourself and offer solutions to the neighborhood’s day to day challenges.
E. All of the above

**Answer: E. All of the above**
Facilitative agenda

Annual Meeting mini-training

What is a co-op and what’s it mean to members?

Time: 20 minutes

Goal: Build membership awareness about resident ownership, develop a membership wish list for community improvements, strengthen knowledge about opportunities for engagement and involvement, and get members to step-up.

Note: Prior to Annual Meeting, have BOD develop a list of 3 to 5 “help needed” items (committee, board position, clean-up day, etc.)

Welcome: Trainer introduces self and thanks all for taking a few minutes of time

Trainer asks: “who was here when the community was purchased”? – show of hands

“Who remembers what it was like at time of purchase? Why did you decide to purchase the park”?

Trainer notes responses on flipchart for why purchase the park and transitions into

A quick review of Resident Ownership:

I. Uniqueness of Cooperatives & Resident Ownership

Trainer asks: “How many people know that you are business owners?”

A cooperative is a business, and must follow the laws, but what makes co-ops different than say, McDonalds?

Solicit input. A Cooperative is:

- Controlled by the members
- Owned by the members
- Benefit for the members.
There is no “they”! Members are the life-blood of any co-op.

Co-ops have an amazing and somewhat untold history in the United States. Often created by people outside the main power structure to improve access to goods and services that people need.

- Here in NH, the ROC-NH helps manufactured housing co-ops gain access to capital (money)
- No one individual is (was) in the position to come up with the money to purchase the park.
- Note ACE Hardware – a cooperative of owners.

II. **What does it mean to be a member?**
 Trainer refers to previous section regarding the uniqueness of a cooperative.
What are member responsibilities to CONTROL the co-op?
What are member responsibilities as OWNERS of the co-op?
What are member responsibilities to ensure the benefits to all members?

 Trainer records input on Flipchart. Highlight the obligations to participate in the governance and operations of the co-op, and responsibilities to pay rent on time, taxes, etc.

III. **Threats & Opportunities**
 Trainer asks: “What happens when members don’t meet their obligations and responsibilities”? What happens to CONTROL? OWNERSHIP? BENEFITS? Note worst case scenario of not paying rent.
Record responses on Flipchart.

 Trainer asks: “What are impediments or hurdles to members not meeting their obligations”? What can be done to help people get over those hurdles?

 Trainer notes hurdles identified and states, “let’s now take a look at what opportunities exist for members”.

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Opportunities for involvement

BOD will have created a list of needs, have listed on flip chart. Trainer opens up a brainstorm session. “What would you like to see in the community or what would you like to see done/improved? Solicit input. Record on Flipchart. Leave space for names under each idea.

Trainer may not have time to create a list of needs and get to commitments from members, but should get a list of needs from the board to seek commitments for participation.

Trainer thanks everyone and will pass on list of commitments to the board for follow up.
Coaching and Consulting

The differences between the two

To explore the issue of differences between coaching and consulting, it's a good idea to first explore different types of consulting. Types of consulting can be described on a continuum with, at one end, the Expertise Model and at the other end, the Process Model. Briefly, in the Expertise Model, the consultant is the expert who is engaged to gather data and present solutions to the client, whereas in the Process Model, the client is fully engaged in finding data, figuring out and applying solutions. There is a continuum of combination styles within this framework.

While coaching is a distinct discipline differentiated from consulting, there is some overlap in values between Process Model consulting and coaching. The following table shows some of the major differences between Expertise Model consulting and coaching.

<table>
<thead>
<tr>
<th>Consultant</th>
<th>Coach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Even when one person is the main client contact, the consultant usually works with more than one person, often in a team, group, board or department</td>
<td>Works on a one-to-one basis; may coach more than one person in an organization, individually</td>
</tr>
<tr>
<td>Structures projects for specific deliverable or result which the consultant is primarily responsible for</td>
<td>Supports the client to achieve her or his own result or outcome</td>
</tr>
<tr>
<td>Usually problem-focused, i.e. identifying and trying to correct problems or weaknesses</td>
<td>Builds on client's strengths</td>
</tr>
<tr>
<td>Regarded as the “expert” who will solve problems (the magic bullet)</td>
<td>Enables client to solve problems or change things for the better</td>
</tr>
<tr>
<td>Consultant brings technical expertise to advise on solutions</td>
<td>Coach brings relationship expertise to support the client’s solutions</td>
</tr>
</tbody>
</table>
Changing the Mindset

From Problem Focus                      To People Focus
Tells/Directs/offer answers              Asks/Requests/Listens
Requires compliance                     Seeks commitment
Knows the answer                         Seeks the answer
Points out errors                        Celebrates learning
Delegates responsibility                 Models accountability

This is a “problem to be solved”         This a person(s) with assets to develop

Focus is on what is wrong that needs fixing Focus is on empowerment and growth
What Coaches Do

The central question that initiates every coaching relationship is how to get from point A to point B. The journey varies, depending on the coach-ee or organization, but fundamentally the coach and Coached are engaged in a process of moving to a new destination. Coaching becomes the lever for maximizing the effect in the process of change.

Coaching can help implement new action, sustain existing action or multiply the effect of action that is underway. The model applies to individuals as they envision their own life lived more fully, as well as to organizations that want to be more successful, more competitive, or more effective.

The role of the coach is to facilitate whatever is most important to the client.

Examples of how a coach facilitates action:
- Assist in personal and organizational change
- Develop personal leadership skills
- Create a compelling personal or organizational vision
- Set stretch goals and build accountability structures
- Identify and remove obstacles
- Provide structure and support for risk taking necessary for bold change

Examples of how a coach facilitates learning:
- Brainstorm new possibilities and stretch beyond self-limiting beliefs
- Gain clarity and focus
- Explore growth and development potential
- Get to the heart of the matter and awaken commitment
- Communicate new levels of honesty and authenticity
- Build confidence and integrity
- Strengthen relationships and model open, empowered relationships
Effective Coaching and Communication Practices

1. Use "I" statements (i.e., don't attempt to speak for the team)

2. Select your key thoughts before speaking - don't think out loud. If you ask a question, make it succinct and don't ask a second until people have had a chance to respond to the first.

3. If you feel nervous or lacking in confidence these are signs that you care about what you are going to say. Channel this energy to support your purpose.

4. Practice non-judgmental listening.

5. Use an open, non-critical tone of voice. Tone of voice is remembered more than words.

6. Ask for feedback regularly. How is this approach to coaching working for you? Is there something I could be doing more of/less of/different that would be more helpful?

7. Re-state what was said as a way to demonstrate that you heard all of the feedback.

8. Be open and hear feedback before you evaluate and decide whether what you heard is accurate or not.

9. Model open and connected body language while giving and receiving feedback.

10. Suggest solutions if presenting a concern or dissatisfaction.

11. Stay connected to your breath......don't speak too fast.

12. Listen to the person's entire thought, before you respond.

13. Remember, coaching is based on building insight and capacity. Praise and cheerleading are useful tools in building confidence.

14. Demonstrate enjoyment in the work you are doing together.
GOOD COACHING QUESTIONS

One challenge for coaches is thinking about how to reframe issues to encourage team problem solving rather than providing an “answer”. These questions may be useful in prompting a discussion that promotes thinking about potential solutions.

- In articulating the challenge:
  - What’s the problem you’re trying to solve?
  - In tackling this problem, where are opportunities to practice new or better governance approaches? Which ones – be specific?
  - If we agree that this is the problem you’ll focus on, what will success look like – for your challenge and in your governance practices?
  - What are the outcomes you seek?
  - How will you know you’re making progress on the challenge and in new governance practices? What will early wins look like?
  - How soon do you want to see some success?

- In developing a plan:
  - What are the 3 – 5 most important things you need to do to make that vision reality?
  - Can you articulate those in good goal language? (SMART goals?)
  - What do you need to accomplish -
    - In the next month
    - 60 days
    - 90 days
    - If you accomplish these things does it feel like the end will be in sight?

- When you run into a roadblock or something unanticipated happens:
  - What was difficult or surprising?
  - Why do you think that happened?
  - What did you learn from it?
  - What can you do to change the result?
  - How is this an opportunity?
  - What, if any, are the implications going forward?
EMPOWERING QUESTIONS

Probing Questions
What do you notice?
What else?
What do you want?
What’s important about that?
What are you excited about?
What are you overlooking?
What’s going on?

Clarifying values
What do you care about in this situation?
What value does this experience have for you?
What do you want? If you get that, then what do you want?
How does this plan honor your values?
What are you committed to?

Setting Stretch Goals
If you knew you would succeed, what else would you do?
What’s the big picture?
What action would really excite you?

Expanding Questions
What is possible?
If you had a magic wand, what would you do?
What impact would you like to have?
What actions are possible now?
What are you choices?

Getting Support
What do you need help with?
Who can help you with that?
What resources do you need? What resources do you have?
What request can you make?
Who has the answer?
If you knew they’d say yes, who would you ask for help?

Action Questions
What’s next?
What do you choose to do about it?
How do you plan to achieve that?
How can you break that down into smaller steps?
What are you going to do? By when? Who will you tell?
How will I know you have completed this?
Is there anything else you need to do?
On a scale of 1-10, how committed are you to this plan?

**Breaking through Barriers**
What’s stopping you?
In an ideal world, how would you face this problem?
What are you stepping over?
What would motivate you to change?
What does it cost if things remain the way they are?
If you had to find a way, what would it be?
What are you resisting?
What are the obstacles?
What will get you going?

**Eliciting Wisdom**
What might you do differently next time?
What can you do to strengthen your team?
When you are at your best, what is happening? What is different?
What do you know in your gut?
Follow Up Questions

Ask Open-ended Questions.

Open-ended questions can’t be answered with a quick “yes” or “no.” Open-ended questions can help people look for connections among different ideas.

General Questions:

- What seems to be the key point here?
- Do you agree with that? Why?
- What do other people think of this idea?
- What would be a strong case against what you just said?
- What experiences have you had with this?
- Could you help us understand the reasons behind your opinion?
- What do you think is really going on here? Why is that important?
- How might others see this issue?
- Do you think others in the group see this the way you do? Why?
- How does this make you feel?

Questions to Use When There is Disagreement:

- What do you think he is saying?
- What bothers you most about this?
- What is at the heart of the disagreement?
- How does this make you feel?
- What experiences or beliefs might lead a reasonable person to support that point of view?
- What do you think is really important to people who hold that opinion?
- What is blocking the discussion?
- What don’t you agree with?
- What do you find most convincing about that point of view?
- What is it about that position that you just cannot live with?
- Could you say more about what you think?
- What makes this so hard?
- What have we missed that we need to talk about?

Questions to Use When People are Feeling Discouraged:

- How does that make you feel?
- What gives you hope?
- How can we make progress on these problems? What haven’t we considered yet?

Closing Questions:

- What are the key points of agreement and disagreement in today’s session?
- What have you heard today that has made you think or has touched you in some way?

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Facilitator Challenges and Strategies

How do you handle not allowing a conversation to go off track and having participants still feel heard?
- If the point is relevant: You can put it in the parking lot and state: That’s a great point. We are planning to go deeper into these types of conversations and topics later on in our sessions. We are going to capture this point and make sure that we bring it back up during that time.
- If relevant (but too long): In the interest of time, we are going to let ... (whoever it is) make the last point and we will move on. Or...we will take this one last comment.
- If not relevant: Thank you for sharing, but if you remember the goal of the study circle or the activity...(state the goal)

Someone has hijacked the conversation. How do you cut them off without being rude?
- “It sounds like you have done a lot of thinking about this. Let’s see if we can get some other perspectives as well.”
- Remind the participants of the ground rules. “Remember that we said everyone would have a chance to talk. Let’s see if others have something to add.”
- “This is an important topic. But, we need to move on to the next activity. Let’s put this idea on the parking lot and we will come back to it later in the session.”

What if the participants are off topic (to your question) but the conversation is revealing of other issues? How long do you let them go on?
- There is no definitive answer. Is the conversation useful? Does it appear to be additive? If yes, you can allow the conversation to continue until it becomes repetitive.
- Put the statement on the parking lot. Say, “This is an important point, but we want to make sure to reach our goals for today’s session. Do you mind if we put this issue on the Parking Lot to come back to at a later time?”

Sometimes participants want the facilitator to answer the question that was posed to the group. How do you respond?
- Don’t respond with your opinion or as an expert. Say, “Can someone else respond to that?” Or, “How are other people feeling about what was just said?”

There is an obvious “ouch” in the room but no one has said anything about it. Should you/how do you bring it up?
- It’s the job of the Facilitator to point out group dynamics and get the participants to discuss contentious issues. So, don’t just let it pass if no one says anything. Some ideas include:
  - “How are others feeling about what ____ just said? Do you agree, or are there different perspectives?”
  - “This is a similar issue that came up when the Leadership Team had this discussion. In that study circle, some participants felt differently. Their perspective was__________. What do others feel?”
- If you don’t think people are ready to talk about it right away, write down the comment. Bring it back later in the meeting to get input.
Great Ways to Engage!

Instructional methods that maximizes participant involvement and learning while taking into consideration a variety of learning styles

Approaches & Exercises

How do you engage people in the content?

- Ask the group: what you already know about... and what do you want to know about....
- Popcorn – rapidly sharing responses to a question
- Take a poll
- Line Up – have participant line up to show years in community, or years of service, etc.
- Ask Questions
- Share goals with one another
- Share a quote, poem or anecdote
- Tell a story
- 60-second group brainstorm
- Ask about burning question the group has
- Finish the sentence. Write on a flipchart: I envision a ROC community where

_________________

- The dots have it. Give everyone a few dots and have them rate the most important brainstormed ideas to gain priority
- Chose an item (grab bag of stuff) and how it pertains to you or the community

Interactive ways to make content engaging a relevant

- Use visuals
- Draw doodles on the board to help remember
- Use charts and have participants interpret
- Divide up the information and have small groups reads it and report out
- Have individuals read something themselves, reflect, and discuss
- Use demonstration
- Prepare handouts with blanks for fill-in during presentation
- Bingo game of information
- Debate
- Mind-mapping as a whole or in small groups – topic in the center and ideas swirled around with arrows showing direction of thought
- Ask participants to provide examples – short, medium or long
- Panel discussion
- Scavenger hunt. Look through the document to find... Look at the website to find...
- T Chart: encourage thought on both sides of an issue (+) good or (-) not good
- Teaching by analogy
- Develop an action plan for sequence of steps
- Work in pairs to pull apart an issue
- Play a game (Jeopardy, monopoly)
- Fill out forms
- Create a budget
- Work with case studies
- Have groups do a skit
- Make up a rhyme or poem
- Draw a diagram
- Create a radio announcement
- Pose a problem for the group to solve
- Build a timeline
- Ask for 2 truths and 1 lie related to the content
- Windowpanes – organize related content together in a table where 4 to 9 topics can be easily referred to and recalled
Training Goals – Good Words to Use!

- Recognize
- Understand
- Learn
- Familiarize
- Establish successful procedure...
- Consider
- Strengthen skills in...
- Learn to navigate...
- Develop
- Know 3 steps...
- Be able to...
- Gain knowledge
- Be exposed to best practices...
- Have a clear understanding...
- Identify
- Build
- Grow
- Increase
- Improve
- Expand
- Explain
- Compare
- Evaluate
- Demonstrate
- Differentiate
- Identify
- Describe
- Formulate
- Name
- Define
- Discuss
- List
- Assess
- Integrate
Facilitative agenda

Annual Meeting mini-training

Creating a Shared Vision – “I envision a community where…”

Time: 30 minutes

Goal: Introduce the concept of community visioning, develop a draft list of membership goals and desires, understand the importance of goal setting, and identify next steps to expand planning for community vision.

Before the exercise:

- Create a flip chart poster that reads: “A vision is a picture of the future. It is an image of what kind of community you are working to create and/or maintain.”
- Pass out 3 sticky dots to each member

Trainer writes on flip chart: “I envision a Co-op where….

Trainer: We deal with many ‘problems’ within our co-ops, so for the next 5 minutes we are going to think about how things ‘could’ be. Thinking about what a co-op could be, complete the phrase on the white board. Trainer records brainstorming idea on flipchart. Once a list is compiled, ask:

- What are the similarities
- Differences
- Motivating and inspiring
- Clear and concise
- Are there connections to be found?
- Everyone has their own opinion and GOOD IDEAS to share
- What does each answer say about the “values, perspectives” of the writer
- Did anyone know what other participants’ answers would be ahead of time?

Trainer now asks participants to place a sticky dot on their top three choices. Once this is done, trainer points out the top three and asks:
Trainer points out the top three and asks:
• What would it take to get everyone on board with the top three?
• Top five?
• What does this say about the goals/interests of the group?
• Is there a starting point for a plan of action

Trainer points to the vision poster and explains that this exercise is a starting point for creating SHARED VISION.

A community vision must:
• Be motivating
• Be easily understood
• Conjures up an image or picture
• Reflects a high set of standards
• Move people to action
• Appeal to shared values and principles
• Represents a future accomplishment.
• Presents a unifying theme

Trainer explains the ‘visioning process’ – takes 6 months or so to complete, and takes a LOT of groundwork. Whether this is done as a country, a non-profit, or a cooperative, several key lessons learned over the past months apply:

• Leaders will emerge
• People get to know one another – 1:1 interaction
• Consensus is built
• Building relationships to understand other members’ values
• Importance of good communication
• Community building and organizing takes time

Have handouts available: Creating a Shared Vision.
ROC-NH can work with your community to help facilitate further discussion around goal setting and organizing teams to successfully tackle the community’s visions.