

A Conveners' Guide to Hosting a Public Forum

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About this guide:

This guide is intended to provide support to Cooperative Extension professionals who intend to bring the public together for an issue discussion. This guide will provide a general overview to help the convener of a public meeting address basic details needed to design and host a meeting to address desired outcomes.

While many public forums allow the airing of ideas, a deliberative forum is a structured event that differs from a debate or public hearing. A deliberative forum is one method of structuring a discussion that allows all participants the opportunity to share their perspectives on a given issue in an organized manner. A well-structured deliberative forum process can be used to involve the public in exploring topics more deeply and to find solutions for shared issues.

A deliberative process:

- Encourages full participation
- Seeks mutual understanding, based on respect for others
- Respects a variety of forms of evidence and different perspectives
- Encourages shared responsibility

WHAT IS THE ROLE OF A CONVENER?

Margaret Mead is credited with once saying, "Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has." The convener is the person that invites this small group of thoughtful, committed citizens over to have a conversation on an important topic. The convener need not be the designated or positional leader. Convening a public event requires establishing clear goals for the event and careful design of a process to bring people together to reach the established goals. The process of convening, while often initiated by an individual, can be more effective when handled through the work of a group.

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Therefore, the following steps are recommended for a successful engagement process:

1. Organize a planning team
2. Determine the goals for the forum
3. Identify a process facilitator
4. Frame the issue
5. Planning and advertising the event
6. Host the event
7. Follow-up

Convening an effective public forum carries more responsibility than just organizing location logistics. Convening for broad participation and effective outcomes requires purposeful planning, outreach and hosting. Primary actors in this organizing activity are the prospective convener(s), the event facilitator(s), and (sometimes) event sponsors.

What is Extension's Role?

Cooperative Extension has a history of convening public groups that dates back to the creation of the Land Grant System. The Smith-Lever Act indicated in Section 4 (c) (2) that each extension plan of work shall detail "the process established to consult with extension users regarding the identification of critical agricultural issues in the State and the development of extension programs and projects targeted to address the issues." The role extension educators serve as conveners and facilitators to identify community issues is fundamental to extension work.

As a publicly supported entity, Extension has a mission and obligation of ensuring that public interests are served through a fair and participatory process. Without purposeful intervention, varying social, cultural, and economic perspectives are not always considered or respected. Effective public engagement requires full and equal participation to identify and address shared public issues. In order to bring this about, Cooperative Extension agents might play the role of convener, host, or facilitator for public events. This document focuses on the responsibilities of convening a public forum.

THE FORUM PLANNING PROCESS

STEP ONE: ORGANIZE A PLANNING TEAM

Organizing a successful public forum requires a core group of people to plan the event. It is the responsibility of this organizing group to select and invite a trained facilitator; determine how the topic will be presented and the format for the event; decide on the venue, date and time; advertise the event; oversee logistics for the event itself. Every decision should go through this core group in order for the event to run smoothly.

Often, public issues do not clearly align with any one individual or organization to indicate a logical convener. Recognizing this, it is important to consider if the planning group has neutrality or equal representation on the issue. This means that the convening group is not organizing a one-sided event to advocate a solution. A critical consideration in forming the planning group is to include members who have different perspectives on the issue. It is important to invite people or organizations who hold opposing opinions to join the planning process. By incorporating people who have different perspectives into your planning group, you can be certain that you are organizing an unbiased forum. The transparency of the process is especially important when addressing a public issue or topic of contention. In addition, a diverse planning group will also provide a more effective outreach to a diversity of forum attendees.

Invite the convening team to an initial conversation. Discuss the issue at hand and recognize how it impacts many people differently. Discuss why each invited person brings an important perspective to the convening team. Agree that each concern and perspective deserves to be heard. Consider how this convening team must be open to listen to others

in order to fully understand the issue and make meaningful progress.

STEP TWO: ESTABLISH GOALS FOR THE FORUM

It is essential to consider the overall goals for hosting the forum before choosing the event process. As a convening group, determine the ideal outcome(s) of a public engagement effort. The desired outcomes will determine the optimal process to use. Identifying the intent of the forum will help clarify what style of forum will be most effective and will provide an overall objective for which to aim.

Consider the following questions:

Is a primary goal to help educate and improve the general understanding of an issue? (If so, what techniques will you use to introduce information in a fair and balanced manner?)

- Is a primary goal to engage all participants to better understand how the issue affects the community? (If so, how will you design it so everyone has an opportunity to participate?)
- Is a primary goal to come to a decision concerning an issue? (If so, what decision-making process will you use?)
- Is an important outcome to develop a plan of action? (If so, what processes will support the group in prioritizing and making plans for next steps?)

Establishing clearly identified outcomes of the engagement will help to identify the best process to use. At this phase in the planning, it is helpful to work with practitioners familiar with public engagement approaches to craft a process that will best meet the goals of the organizing group and the public.

Common types of public processes include methods for:

Public Dialogue - processes that engage participants to discuss, clarify and better understand an issue

Public Consultation - to listen to attitudes and ideas on an issue that will be decided by an appropriate authority

Public Decision Making - to engage the public in recommending or deciding on policy or determining action

Public Debate - to educate about options, and ask community members to consider one alternative over another

Conflict Resolution - to strengthen relationships and seek understanding and agreeable resolution to a divisive issue

Strategic Planning - to establish shared goals and agreed upon action strategies

Public Deliberation - a structured dialogue that aims to identify and weigh trade offs toward agreeable solutions

STEP THREE: CONTACTING A FORUM FACILITATOR

Planning groups should always consider using an experienced facilitator for their forum. There are significant benefits to contacting a facilitator early in the planning process. Effective facilitators remain neutral on the topic of the forum. They are skilled at encouraging discussion from all participants and handling disagreements and distractions smoothly. Effective facilitators are practiced at keeping the discussion on topic and ensuring that the event remains productive. Finally, effective facilitators possess skills to support public processes that may be utilized in the planning of your forum. They can assist with the framing of the issue and design questions to encourage discussion at the forum.

The facilitator does not need to be an expert in the issues of the forum. It helps however, for the facilitator to get acquainted with the issues before the meeting. If possible, include the facilitator early in the forum planning process to discuss the purpose, intent and issues of the forum. It is beneficial for the facilitator to understand the history of the issue, the main stakeholders, and the potential perspectives on the issue that may be represented in the forum.

STEP FOUR: FRAMING THE ISSUE

Issue framing refers to how the issue is introduced and worded for discussion. Framing an issue is an act of defining and describing the issue that allows for respectful deliberation. How the conversation topic is presented, or framed, can shape how people approach the conversation right from the start. The benefit of a diverse organizing team is to make sure diverse interests are represented in the way the issue is described and introduced for conversation. Without several perspectives represented in the framing process, it is possible to either frame the topic too narrowly or from a biased perspective from the start.

Framing determines the scope and scale of how the issue is described and phrases the issue in a way that allows for broad participation in addressing the issue. It is a common tendency to frame issues too narrowly, which can intensify a debate. For example, if the conversation is framed: "Should we have a leash law?" The question is established in a "should we or shouldn't we" dichotomy. The conversation

that follows will likely be a debate between advocates for and against having a leash law. If you are seeking a debate, this is an appropriate framing.

If, on the other hand, the goal of the meeting is to have a discussion to identify the most agreeable options to allow pets freedom and to support public safety, the conversation topic might be promoted as: "Public safety and pet health; finding a working balance." Participants coming to this conversation would be more likely to expect a conversation and less entrenched in a specific position or solution.

STEP FIVE: PLANNING AND ADVERTISING THE EVENT

Identifying and inviting key stakeholders

A process of stakeholder identification should be used by the planning team to identify individuals, organizations, and persons with interests that will be impacted by the issue or topic being addressed. Sometimes it is helpful to think about who will benefit from the issues at hand or solutions advocated. In addition, it is important to consider who will bear the costs of any solutions being promoted. These are stakeholders also. The identified individuals or entities should be specifically invited to participate in the event. Personal invitations (letters or phone calls) to specific stakeholder groups are recommended. Other community groups who have a particular interest in the topic of your forum should also be invited. If the issue is one that you are wanting full public participation, you should be as inclusive as possible in the invitations you extend.

Pre-event planning

There are several important considerations for selecting the time, date and location of the event. To maximize participation:

- Choose a public location such as a community center or a library that is appropriate for the size of audience you expect.
- Consider holding the forum at a neutral location that is fully accessible. Provide transportation if necessary.
- Consider the possibility of providing childcare or addressing other potential barriers to participation.
- Consider the time of day most accommodating to the stakeholders you have identified. Finding

the best time may mean holding multiple forums at multiple locations.

Advertising and publicity

Gaining public attention and time can be a challenge. Public meetings should be broadly advertised. In addition to newspaper and news releases, consider the use of social media. It may be possible to share advertising at organizational meetings or churches. Advertising can begin once the date, time and location have been finalized. Be sure that all advertising includes the purpose of the forum and details that include other services being offered (transportation, child care, etc.) Remember, the most effective invitation is a direct invitation.

Contacting the media

It is helpful to detail the key points for emphasis that you wish to share before contacting the media. Create a press release to share with local newspapers and radio stations informing the public of the event. Consider the role of the media during the event. Media presence at the event can affect how willing people are to be open and frank during the discussion, so you may want to ask media to respect participants by not recording individuals during the event. Interviews before or after the event may be a preferred time for the media to document the event.

Designing the program and evaluation

A program or agenda that you hand out as participants enter the event can be helpful. This document should include the goals and purpose of the forum, as well as highlight the main issues that will be discussed. Programs may also include ground rules for the event as a friendly reminder to forum participants.

Once the anticipated outcomes for the event are clear, determine how the achievement of these outcomes will be assessed and evaluated. The evaluation can be a short, simple series of questions and can be exclusively to gather feedback about the effectiveness of the forum, or could include questions about how residents would like to address the issue at hand. Sample questions may include:

Did this forum expand your understanding of the issue? If so, how?

Did you find this format beneficial? Please explain:

Are there aspects or implications of this issue that have not been considered, and, if so, what are they?

What do you believe the next steps should be?

The planning committee will need to determine what questions are asked and how the evaluation will be implemented.

Confirming details

Two or three days before the forum, the conveners should confirm any last minute details with the following people:

- The facilitator
- Panel participants or presenters
- Person responsible for food/beverage
- Person responsible for location, where the forum is to be held
- Person responsible for any technology needed at the forum (microphone, projector, etc.)
- Person who will introduce the forum (if different than facilitator)
- Any key members of your planning committee and/or stakeholder groups

STEP SIX: HOSTING THE EVENT

The organizer of the forum will want to arrive early to make sure that all the details are confirmed, directional signs are in place, and the room is set up correctly. The host and conveners should be attentive to the room arrangement. The conversation patterns within the forum will be influenced by the physical arrangement of the room. Consider what type of room set up would lead to optimum participation from the participants.

- The facilitator, host, and conveners may wish to greet participants to the forum. This can help to establish a welcoming environment.
- Double-check any technology/equipment that is required for your event. Projectors, microphones, DVD players, etc. in advance of your start time.
- Make certain handouts and evaluations are ready for distribution.

STEP SEVEN: POST EVENT DETAILS

It is unlikely that one meeting has resolved a complex issue. It can, however continue to make positive strides toward solutions that will. Sharing the results from the forum is another way to broaden public awareness of the topic and support the trustworthiness of your convening team through transparency. Aside from the media coverage,

conveners may consider creating an “after-action” report that can be distributed. The report can detail the purpose of the event, information about the event, and results of the event. Evaluation results can provide good information on participant responses and planned next steps. The report can serve as a useful record of what was discussed and can be shared with the media and/or pertinent policy makers as agreed upon by forum participants.

RESOURCES:

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Winer, M., & Ray, K. (1994). *Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey*. Amherst H. Wilder Foundation, 919 Lafond, St. Paul, MN 55104.

For additional assistance with planning public forums in Kentucky, Contact the CEDIK office:

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