An Inter-field Toolkit for Place-based Civic Action

A companion to the Parkersburg case study

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PARKERSBURG CASE STUDY
This Toolkit is a companion piece to the Practical Case Study of Place-based Action in Parkersburg, WV. The Civic Action Lab supported residents in Parkersburg, WV to take on the issue of substance use. Check out the Case Study for the story and the team's learnings.

LEARNING SERIES VIDEOS
The Civic Action Lab planned a 10-part Learning Series in Spring 2026 to equip practitioners with the skills needed for effective place-based civic action. Learn directly from experts, by reviewing the highlights and recordings here.

Welcome

This Toolkit features the tools that the Civic Action Lab used in support of an inter-field pilot in Parkersburg, WV. The tools are presented in detail so that you can use them in your own work.

The Civic Action Lab is a cohort of ten organizations from the bridging, organizing, and participatory democracy fields. The Lab is convened around a shared belief that **by bringing together bridging, organizing, and participatory democracy, we can add up to more than the sum of our parts.**

The Civic Action Lab initiated a place-based project in Parkersburg, WV, which took place between 2024 and 2026. In the "Parkersburg Engagement Project," the Lab piloted its inter-field approach:. Lab members equipped Parkersburg leaders with tools from bridging, organizing, and participatory democracy in key moments throughout the process to support the on-the-ground success.

When a typical challenge arose that might otherwise derail a team's momentum (like burnout of leaders and tension arising between team members), Lab members were at the ready with targeted support from their respective fields, and the project continued to pick up steam. Through the process, it became clear that, indeed, bridging, organizing, and participatory democracy each offer an invaluable contribution to place-based civic action work.

Tips on using this Toolkit:

- The tools are organized by field- the order in which they are presented is not meant to be prescriptive.
- Some tools are paired well together, which is referenced throughout the text.
- Check out the linked resources for additional guidance.

Civic Action Lab

Get in touch to explore partnership.
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BRIDGE

ORGANIZE

DECIDE

Facilitation Tips

What is the goal of a facilitator?
A facilitator helps a group have the kind of conversation it intends to have. This means creating shared expectations, encouraging people to listen and respond to one another, making space for different voices, and keeping the group focused on its purpose. Facilitation is less a rigid set of steps than a collection of tools that help people contribute, reflect, and hear one another. There are many specific facilitation methods that one can dive deeper into and learn, which are specifically suited to different purposes. These tips are intended as a starting point for someone facilitating a discussion of a team that is working on a project together to support their successful collaboration.

A good facilitator does not need to resolve every disagreement. Instead, the goal is to make disagreement productive by helping participants explain their perspectives, critique ideas rather than people, and remain curious about what others are saying.

Preparing for a session

- Know the purpose: Clarify what kind of conversation you are facilitating. Is the goal to build understanding through dialogue, make a decision through deliberation, or come up with a concrete plan to advance the work?
- Prepare inviting questions: Prompts should invite reflection of relevant experiences and reasons behind participants' perspectives rather than simple "yes" or "no" answers.
- Set shared expectations: Prepare ground rules or leave time for participants to develop them together. These should encourage mutual respect, active listening, inclusive participation, and respectful disagreement.
- Plan for different ways to participate: Some people are comfortable speaking immediately, while others may benefit from more time to think, a smaller group context, or a written opportunity to contribute.
- Identify your own biases: Especially for conversations where trust must be built, the facilitator plays a key role in building faith in the process. To earn that trust, you should consider how your own values and emotions guide your thinking on the topic and be transparent about that with participants upfront, potentially recusing yourself from facilitating.

EXAMPLE PROMPTS

Clarifying
"Could you further explain what you meant by...?"
"From what I'm hearing, you are suggesting... Is that accurate?"

Inviting Participation
"We've heard a few perspectives already. I'd like to make space for anyone who hasn't spoken yet."

Redirecting
"How would you connect that point to [the main topic]?"
"There's a lot to explore there, but in the interest of time I'd like to refocus on..."

Synthesizing
"A few different ideas are emerging. Let me outline what I've heard..."

De-escalating
"I am hearing two different concerns. Let's understand both before we continue."

Facilitation Tips

(Continued)

During the session

- Set expectations early and return to them: Explain the purpose of the conversation and review ground rules. It is important to hold participants accountable to the agreed upon rules to cultivate consistency and trust.
- Listen and paraphrase: Restate what you hear so participants know their contribution was understood and have an opportunity to clarify.
- Invite quieter voices: Pay attention to who has and has not spoken and intentionally create openings for everyone without forcing participation.
- Ask for reasons and experiences: Encourage participants to explain why they think something or connect their perspective to their own personal experience.
- Synthesize periodically: Briefly summarize emerging ideas, areas of agreement, and unresolved differences.

Common challenges

- The conversation goes quiet: Silence is not necessarily a problem. Participants may need time to think. If needed, ask about relevant personal experiences, invite quieter voices, build on an earlier comment, or reconsider whether the question needs reframing.
- One person dominates: Acknowledge their contribution and create room for others. Invite new voices, use structured turn-taking, or redirect to another speaker or question. The goal is to rebalance participation rather than silence someone.
- Disagreement becomes heated: Recognize the tension, paraphrase the concerns, bring in other voices, revisit conversational agreements, and encourage "I" statements. If necessary, temporarily stop or restructure the conversation.
- The conversation drifts off topic: Recognize what the speaker contributed before explaining why you are redirecting the group.

RESOURCES

→ Facilitation 101: A Beginner's Guide to Dialogue and Deliberation

Effective Listening

Credit: Essential Partners

Why is it important to practice listening?
When people of different backgrounds and beliefs come together, participants may arrive with a strong sense that they are right and the other side is wrong, and with the desire to convince the other to change their position. An intention to persuade often causes the other person to get defensive or shut down. If there is a desire to connect across the different perspectives, the priority should be redirected toward focusing on understanding and being understood. A posture of seeking understanding rather than persuasion encourages others to relax and be open to new ideas.

When is listening for understanding most important?
Intentionally listening for understanding is most important when relationships are already tense, when polarizing issues are discussed, or where there is a high potential for misunderstanding.

IN PRACTICE: Essential Partners led the Parkersburg leaders in their "Full Spectrum Listening" exercise via Zoom, in which Committee members were invited to share personal stories and practice their listening skills. (Feb 2025)

EXAMPLE PROMPTS

EXERCISE: QUESTIONS OF PERSUASION VS CURIOSITY

Working in pairs, designate a partner A and partner B.

Partner A will state a belief, and then partner B will respond with a critical question meant to highlight a perceived flaw in that belief. The participants can optionally further explore that conversation to see how it develops.

Then, Partner A will restate either that belief or a new one, and partner B will attempt to ask a question that genuinely seeks to understand the logic and motivations of partner A's belief. Participants can optionally continue that conversation briefly as well.

Afterwards, debrief on how the two questions were phrased, and how it impacted their experience of the conversation.

Effective Listening

(Continued)

Strategies for effective listening:

- Speak to be Understood:
- Connect First: Make space to connect on a human level - sharing something about yourself - what you care about, what you are proud of, how you came to be the person you are - before diving into difficult topics.
- Use "I-Statements": Share your experience rather than speaking for others or assuming others agree with you and yours is the only way to see a situation (e.g., "I feel concerned about this issue. .." rather than “everyone knows this is a problem…”).
- Lean into Complexity: Make your point easier to hear by acknowledging complexity or uncertainty (e.g., "I understand your concern and I share a similar one, and, I see this differently, and I'd love to share why...").
- Listen to Understand
- Acknowledge: Recognize and validate the other person's feelings ("I can see this is really important to you...").
- Reflect: Briefly restate the other person’s view to confirm your understanding ("I hear you're worried about...").
- Stay Curious: Ask genuine, open-ended questions to better understand the other person’s perspective ("Can you tell me more about what led you to this view?").
- Things to Remember
- Remember words carry different meanings—stay curious and clarify what others mean.
- Slow down - Notice if someone becomes reactive; breath and take pauses so as not to escalate the reactivity
- Be clear about your purpose - avoid bad-faith conversations; shared purpose for the conversation is essential.

RESOURCES

→ Active Listening Resource

World Cafe

Overview
The World Cafe methodology is a way to structure conversations among a large group of people in which participants can engage with nuance and build on each other's contributions. It does so by taking a large group and breaking them into several smaller groups at individual tables (or breakout rooms if done virtually), and inviting participants to engage with a specific question and then rotate to another table in a subsequent round to engage with a different question.

Strengths and Limitations
The World Cafe is an alternative to other large-group discussion formats like the town hall format in which only one person can speak at a time. Those environments have advantages, but often face challenges if a speaker offends audience members or uses their time at the mic as an opportunity to advance a personal agenda unrelated to the core topic. The World Cafe resolves this by focusing conversations in small groups where those risks are mitigated and where quieter or more hesitant participants have greater comfort to speak up. The World Cafe is more an exploratory than exhaustive process, however, and ideas surface in this format must usually be brought to the whole group for further consideration.

IN PRACTICE: The Lab held a World Cafe about how to integrate the insights from bridging, organizing, and participatory democracy into the Parkersburg pilot. It allowed the mixed group of local leaders, Lab members, and funders to consider the project through the lens of each field. (March 2025)

ROLES AND RESOURCES

Facilitator: This person will introduce the activity, explain the rotation process, keep time, and bring participants back together for reflection.

Table Hosts/Notetakers: One person will remain at each table throughout the activity to record ideas and briefly orient each new group to what took place during previous round(s). Participants: Participants will move between tables, contribute to each conversation, and build on what previous groups have discussed.

Discussion Stations: Prepare several tables or virtual breakout rooms, each with its own question or prompt. In person, provide large sheets of paper and markers so ideas can be recorded visibly.

World Cafe

(Continued)

Method

1. **Develop Discussion Questions**: The Facilitator will prepare a set of questions related to the broader topic. Each table should focus on a different question or dimension of the issue so that participants explore different aspects of the broader theme.
2. **Introduce the Process**: The Facilitator will explain that participants will discuss a question in a small group before rotating to another table. Participants should build on previous conversations rather than treating each rotation as a fresh start.
3. **Begin the First Round**: Participants will divide among the tables and discuss the question assigned to that station. Participants could either be assigned to a specific table (and later tables), or they can go wherever there is available seating. The Table Host will capture major ideas, areas of agreement or disagreement, and questions that emerge.
4. **Rotate Participants:** After a set amount of time, often 20 minutes, the Facilitator will ask participants to move to a new table. The Table Host will remain at the station and briefly summarize what the previous group discussed before inviting the new participants to respond and add their own perspectives.
5. **Repeat the Conversations:** Participants will continue rotating through additional tables for as many rounds as makes sense given the size of the group and amount of time available. Each round should build on the ideas left by previous groups, allowing the contributions to develop as more perspectives are added.
6. **Share in Full Group**: After the final rotation, the Facilitator will bring everyone back together. Table Hosts will summarize recurring ideas, disagreements, and questions that emerged from their conversations.
7. **Reflect and Document**: The Facilitator will ask participants what they noticed across the different conversations and record major themes for future consideration. Depending on the purpose of the meeting, these ideas can then inform additional sensemaking, evaluation, or decision-making.

ADDITIONAL CONSIDERATIONS

Questions Shape the Conversation: Each table should explore a distinct but connected aspect of a broader topic. Questions that overlap too much can make rotations repetitive, while questions that are too disconnected can make it difficult to draw conclusions across the conversations.

Build Rather Than Restart: The value of rotating groups is that participants encounter and build on ideas from people they may not have spoken with directly. Table Hosts should provide enough context from prior rounds, while allowing the next group plenty of time and freedom to address the topic with their own insights.

Consider Group Size: Tables should remain small enough that participants can speak conversationally rather than taking turns giving formal statements. If the overall group is large, adding more tables is generally preferable to placing more than 6-8 people at each table.

RESOURCES

→ World Cafe Method

Interviewing for Trust and Understanding

Credit: Essential Partners

Overview

Interviewing for Trust and Understanding is an approach to establish, protect, and rebuild trust between individual collaborators. It can be a way for a facilitator to help prepare someone who is unsure if they want to participate so that they can reflect on their own purposes and perhaps build a sense of possibility.

Strengths and Limitations

This tool is designed specifically when a specific key stakeholder in a project is hesitant to engage or when there is tension between team members and uncertainty about whether to talk about it directly. This tool allows for a neutral person to reach out to the hesitant stakeholder(s) in a way that allows for introspection and attentive listening. Through this process, participants can overcome reservations and distrust and more clearly articulate their boundaries or capacity.

ROLES AND RESOURCES

Potential Participants: Individuals who may be important to the process but are not sure they trust the process or see value in the effort. Or individuals who have developed a divide within a group and need help processing their experience and cultivating curiosity about the other.

Guiding Questions List: This set of questions focus on participants' personal interest in an issue and their perspective on the other.

An Interviewer: This interviewer should have the trust of any participants before the exercise begins.

Interviewing for Trust and Understanding

(Continued)

Method

1. **Establish Investment and Comfort Zones:** The interviewer should connect with each participant ahead of time to understand why each participant values the partnership with the other participants. During this initial conversation, the interviewer can also discern whether they are comfortable discussing the matter directly with the other person or whether a third party would be helpful.
2. **Conduct Interviews:** The Interviewer will meet one-on-one with each participant and use some questions to dive deeper into each participant's investment in the issue and the challenges they face or fear facing in working with the other. These questions could include:
   a. Help me understand why this situation is so important to you.
   b. What would you like to have the other party to accurately understand about you and your perspective?
   c. What questions do you wish they would ask you?
   d. How do you feel misunderstood by (him, her, them) and how has that impacted you?
   e. What do you already know about the other party's perspective? What would you like to understand better about the other's perspective? What questions would you like to ask them?
   f. What values do you imagine you have in common with the other party; where might you differ?
   g. What would you need to be able to do (think, feel, say) in order for this conversation to go well, were it to happen? What would you need from yourself?
   h. What would you need from them?
   i. What would shift for you, and them, if you could have this conversation and it went well?
   j. When you've had a successful difficult conversation in the past, what did you do that contributed to it going well?
3. **Review Answers or Themes:** After the conversation, the facilitator can check in with the participant to see how they are feeling about the prospect of joining the dialogue or project or reengaging with others. If it is helpful, the interviewer can reflect back what they heard and ask what else the participant needs for support.

ADDITIONAL CONSIDERATIONS

Dialogue and participation in collaborative processes need to be voluntary and not coerced. It is important that this process makes space for new thinking and perspectives, but doesn't feel like pressure to engage or reengage if that isn't in the participant's best interest.

RESOURCES

→ To learn more, we recommend that you attend a training or reach out to Essential Partners for a free consultation call.

Reflective Structured Dialogue

Credit: Essential Partners

Overview:
At its core, Reflective Structured Dialogue (RSD) is a flexible set of principles and tools. You can use RSD for a dialogue that will support healthier discussions of the most explosive, polarizing issues. You can use it to repair trust and deepen belonging after a harmful incident. You can also adapt RSD for less formal and less divisive situations, like staff meetings, classrooms, and public forums. For this resource, we've put together elements of RSD that are often used for small-group dialogue settings where there are meaningful differences of perspectives and identities. More design would be needed to address the most intense and divisive topics. For that, we recommend that you attend a training or reach out to us for a free consultation call.

Strengths and Limitations:
This approach to dialogue is meant to build relationships, trust, and understanding, rather than arrive at consensus or a collective decision. It is especially useful during the earlier phases of a civic action effort when participants with differing partisan identifications, identities, or core values are coming together. RSD can also be useful after challenging events, particularly those that could damage trust between participants. Dialogues rooted in RSD set the stage for a decision-making process by setting a foundation of mutual understanding, trust, and curiosity. Beginning with dialogue can also help establish patterns of listening and speaking, supporting the rest of the project to go more smoothly.

IN PRACTICE: Essential Partners hosted a Reflected Structured Dialogue early in the Parkersburg pilot, inviting the mixed group of local leaders, Lab members, and funders to consider learnings from their past: "Share an experience you have had in a community that you've lived in or consulted to where you witnessed people coming together to make things better." (March 2025)

ROLES AND RESOURCES

Dialogue Designers: Dialogues are carefully designed to meet the purpose and context. If you're facing a divided community, try to assemble a design team that reflects the diversity of the participants. You can learn more about design in Fostering Dialogue Across Divides, Essential Partners' field guide to community dialogues.

Facilitator: The facilitator is the person who supports the group through the dialogue. Usually, the facilitator does not participate in the dialogue. If the dialogue takes place after a challenging event, it is particularly important to find someone whose position, identity, or affiliation invites the trust of the whole group.

Participants: Participants are the group members who will engage in the dialogue. Small groups of 5-10 participants are best suited for the dialogues described here, but much larger groups can be accommodated by dividing into smaller groups.

Reflective Structured Dialogue

(Continued)

Method:

1. **Clear and Shared Purpose**: The Facilitator ensures that all participants understand and share the intention that the dialogue is meant to build understanding, without the goal of persuasion or making immediate decisions.
2. **Co-Create Communication Agreements**: Communication Agreements are clear guidelines that everyone in the group commits to following. They should be objectively observable, such as "I will not interrupt others" or "I will not speak over my allotted time." Avoid agreements that require anyone to interpret and judge another person's intentions or motivations. When all participants commit to a set of agreements, the facilitator can then invite people back to those commitments if they slip. Communication Agreements create equity, clarity, and a sense of safety, allowing participants to share their perspective and listen with care.
3. **Dialogue Questions**: The facilitator asks dialogue questions that help people reflect and share their experiences, perspectives, hopes, and concerns. One of the most common dialogue structures has three types of questions:
   a. *Opening Questions* that invite participants to share an experience that informs their views about the topic, such as, "Can you share a story from your life about why [this issue] matters to you?"
   b. *Deepening Questions* that encourage participants to share their core value or "What is at the heart of the matter for you?" A third question often asks people to engage in the complexity of their own perspective, such as, "What questions, concerns, or doubts do you have about [this issue]? Where do you feel points of tension within your own thinking?"
   c. *Closing Questions* that invite participants to reflect on what the conversation has surfaced, such as, "What new understanding or insights did you gain today?" or "What is one thing that surprised you about what you heard today?" It can also be a time to reflect on their participation, such as, "What did you do or refrain from doing during this dialogue that helped it go as it did?"

ADDITIONAL CONSIDERATIONS

Equal time: The Facilitator ensures that all participants have equal time to speak. Use a timer that everyone can see or hear.

Consider Speaking Order: Clarify speaking order ahead of time. Be mindful of any power dynamics. Try not to have the same person begin the go-around of responses to each dialogue question.

Reflection: Give participants 1-2 minutes to reflect on each dialogue question before the first person speaks. Invite them to take written notes.

Silence is welcome: Giving participants occasional pauses to consider what they've heard ensures that the conversation doesn't feel formulaic or rushed. Allow participants to pass if they want and come back to them.

RESOURCES

→ An Essential Partners Dialogue Experience

→ Fostering Dialogue Across Divides

→ Guide to Conversations Across the Partisan Divide

Problem Tree

Credit: "Synergizing Nonviolent Action And Peacebuilding," US Institute of Peace; shared with the Lab by the Horizons Project

Overview
Drawing a problem tree is a visual tool that helps groups define a problem in their community, understand its causes and effects, and more accurately prioritize actions in response. In this activity, grouped participants draw a tree onto a sheet of poster paper or a digital whiteboard with the trunk being the central problem. They then use the space around the canopy to identify effects of the problem and the space around the roots to identify root causes.

Strengths and Limitations
Especially when a problem is complex with wide-ranging causes and effects, it can become difficult to identify where to start or how to proceed. Focusing solely on the effects of a problem may prevent community leaders from taking action against the root cause. For example, a complete focus on responding to the adverse health impacts from localized air pollution may not be as effective as stemming the pollution in the first place.

Conducting this exercise with a group therefore clarifies what should be addressed first, what should be considered and mitigated, and what might be a distraction. It is expected that some causes may also show up as effects and vice versa, given the complex and interconnected nature of challenges facing communities. There is no perfect output: it should be seen as a framework for a group to have an open-ended discussion rather than a final and definitive capturing of the interrelated causes and effects.

ROLES AND RESOURCES

Poster paper or a whiteboard.

Sticky Notes

Markers

Facilitator

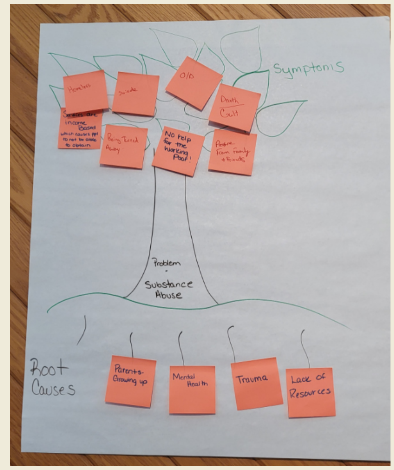
Participants

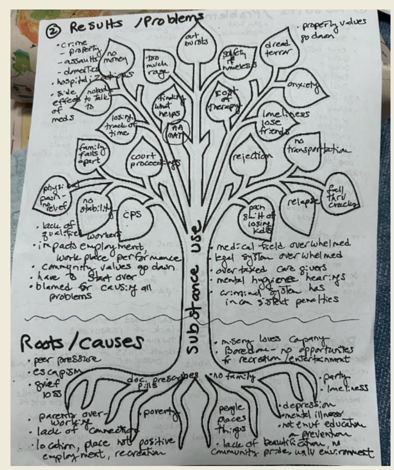
Problem Tree

(Continued)

Method

1. **Draw the tree and explain the activity:** The value of this exercise lies in the ability to attempt to separate the identified problem from its causes and effects. It is important to explain three parts of the tree so that everyone can contribute with that distinction in mind:
   a. **Trunk**: This is the main problem under consideration, and could be considered the "label" for the whole tree.
   b. **Roots**: These represent the root causes of an issue. Depending on the issue, you may separate causes into direct causes and underlying causes.
   c. **Leaves**: These represent the impacts of the issue. There may be primary effects and secondary effects. For example, a primary effect of someone experiencing addiction may be job instability, and a secondary effect may be housing instability.
2. **Identify the issue:** The first step after framing the activity is to identify and label the problem under consideration as the "trunk," and to find a way to phrase the issue such that participants are on the same page about what is being referred to. This may not be a straightforward process and instead require the group to deliberate and make a decision, in terms of which issue to place as the focus. (The consent-based decision-making tool (see page & may be supportive in supporting the group to select a focus issue.)
3. **Identify issue effects and root causes:** Working either as a whole or in rotating groups, participants will list effects of the issue and then brainstorm the root causes, both those that are apparent and direct and those that might be underlying or less visible. For both effects and causes, participants should consider multiple lenses such as political, social, economic, and environmental effects and causes. It is ok and to be expected if some aspects appear as both a root cause and an effect given the complex interconnected nature of the issues communities are facing. Overlaps can be acknowledged and discussed by the group.
4. **Review and discuss:** Having filled out the tree, the team can review the result and share what catches their attention. Are there root causes that are more apparent to them now? What among the causes could be tackled given the resources and expertise available to the team? What is both approachable and could be addressed in a meaningful way?





RESOURCES

→ "What Is Driving or Mitigating the Conflict?" (SNAP Action Guide pgs. 90-92)

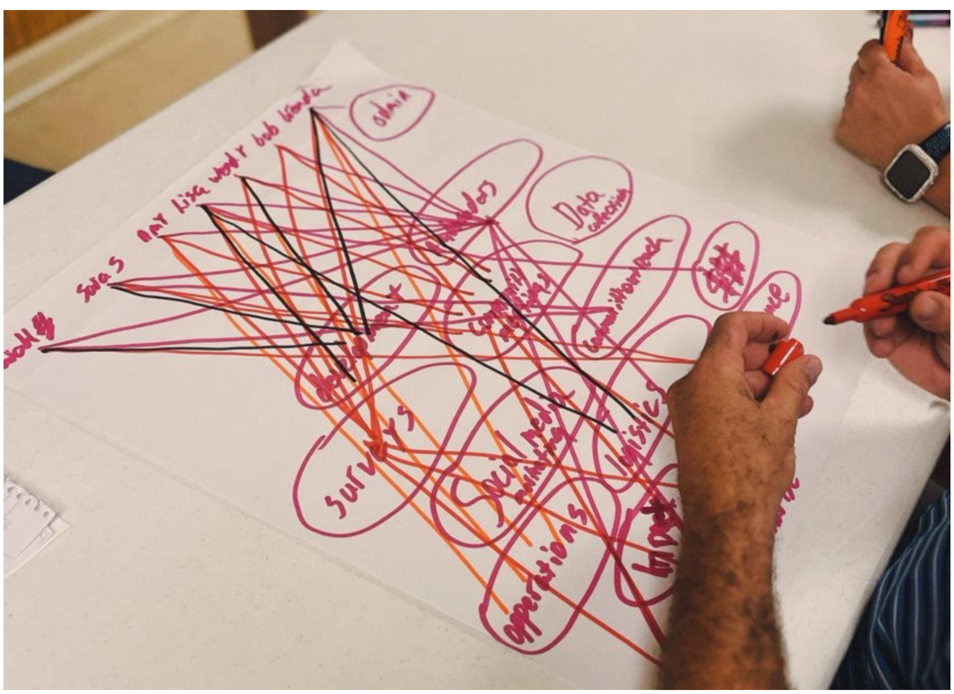
Leadership Mapping

Overview

Visually mapping out the leadership of your team is a way to ensure that responsibilities are well distributed, contingencies are prepared for, and skills and constituencies are well represented in your team. This is a flexible approach. How you carry it out will depend on which goal is most important to you at the moment: shared leadership, emergency preparedness, or community representation.

Strengths and Limitations

These exercises are best done early on in your collaboration, since setting joint expectations can prevent disagreements and misunderstandings. This tool can also be used to help address those misunderstandings when they arise or when new leaders join your team. This exercise will not necessarily develop the strong, trust-based relationships that leaders of an effective collaboration require, meaning it is best complemented with other tools, such as the Effective Listening Resource.



IN PRACTICE: The Parkersburg pilot Steering Committee used Leadership Mapping to take stock of how responsibilities were distributed across the team. This revealed that Lisa and Wendy were holding a lot of pieces. (July 2025)

ROLES AND RESOURCES

A mapping tool: This could be a large sheet of paper or a whiteboard and markers, or an online graphics tool.

Participants: All the members of your core leadership team should be present.

Leadership Mapping

(Continued)

Method

1. **Mapping:** Using the mapping tool, participants draw out a web of the leadership team. This could include individuals or formal bodies such as committees, depending on the size of your leadership team. Leave sufficient space to write further text by each entry. If relevant, participants can also draw connections between entries to represent close relationships or formal decision-making relationships between groups and leaders.
2. **Adding Detail:** Participants write one or more of the following for themselves or the team they represent on the map:
   a. Their current responsibilities – do this if you are trying to ensure a sustainable and equitable delegation of tasks.
   b. Their self-identified skills – do this if you are trying to assess for skill-gaps on your team.
   c. The stakeholders and communities they understand or represent – do this if you are trying to identify gaps in representation.
3. **Cross-Checking:** Participants should look at each other's contributions and add their own contributions to different parts of the map. The goal of this is to ensure that the full extent of responsibilities, skills, and/or networks is depicted.
4. **Reflection:** Having done the mapping, participants reflect on it. The following guiding questions are offered depending on the focus of the activity:
   a. If you mapped responsibilities: Are they well distributed? Does it look like any one person has more than is fair or sustainable? Relatedly, what would happen to each person's current responsibilities if they were no longer able to fulfill their role?
   b. If you mapped skills: Which skills are missing? Which ones are abundant? Is the team making the most of its assets?
   c. If you mapped stakeholders and represented communities: Who from the broader community is missing? Is any group overrepresented compared to their size in the community or relevance to the issue under consideration.

RESOURCES

→ Collaborative Leadership

RACI Task Delegation

Overview
A RACI matrix is a tool for teams to clearly define who is **R**esponsible, **A**ccountable, **C**onsulted, and **I**nformed for various tasks. It is useful for establishing accountability and task delegation at the outset of a major project or when a team needs to rebalance its current workload among team members. The first step involves thoroughly describing each task, its metric of success, and when it must be completed.

Strengths and Limitations
RACI makes very clear the relationship between each team member and a specific task. This can be particularly useful among teams that have just come together, where workflows are ambiguous and members may not be familiar with others' way of working. It would likely be superfluous for assigning relatively straightforward tasks which do not require extensive consultation or management.

IN PRACTICE: The Parkersburg pilot Steering Committee did an exercise on the RACI Matrix and then mapped out all tasks involved in planning a series of public events. Committee members promptly started signing up to take on more reponisibilities. (July 2025)

ROLES AND RESOURCES

Participants

A RACI Matrix (described in detail on next page): this can be a physical document or a digital table.

RACI Task Delegation

(Continued)

Method

1. **Define Tasks:** Working collaboratively, participants should list out the tasks that need to be completed. Participants will then build out a fuller description of each task including how success is defined. Each task should have a final deadline, although they may also benefit from internal "check-in" dates.
2. **Assign Roles:** Once all relevant tasks have been listed, the team should give each task a row in a RACI matrix with team members as columns. The group will then fill in the cell for each person's relationship to each task, as follows:
   a. Responsible: This is a person to actually does the work needed to complete the task
   b. Accountable: This is the person who "owns" the task. In many cases, this person may also be the one responsible for the work, although on a more complex work stream, the accountable individual may be a project manager with several team members who are themselves "responsible."
   c. Consulted: This is a person who should be consulted in the course of the task, but is not expected to do work beyond providing information to those who are responsible.
   d. Informed: This is a person who will receive updates about the task, but otherwise is not involved in implementation.
   e. Not applicable (N/A): In some cases, a team member won't have any role on a task and can be listed as "Not Applicable."
3. **Review Balance:** After assigning roles for each task, participants examine the overall chart and consider if the tasks are assigned in alignment with team members' skills and capacity.

ADDITIONAL CONSIDERATIONS

Consultation in lieu of responsibility: If one participant has accumulated too many responsibilities over the course of the exercise, they might switch out for a consultation role so that their expertise can be incorporated in some way without overcommitting themselves.

Simplified version: If conducting a full RACI matrix feels onerous or ill-suited, Participants could instead focus on creating a task description, definition of success, deadline, and then specifying one task owner who is primarily responsible and accountable for the task and optionally identifying supporting team members.

Practice exercise: If the RACI matrix model is confusing to participants, it could be useful to analyze a recent task and use that as a concrete example to understand who had (or should have been) responsible, accountable, consulted, and informed.

RESOURCES

→ RACI Template

→ Menu of Tasks

Power Mapping for Relational Organizing

Credit: West Virginia Can't Wait

Overview

Power mapping is a tool for identifying key stakeholders, decision-makers, and community influencers who may influence the success of a project. It helps organizers understand who they need to connect with, build relationships strategically, and expand their influence to achieve the desired impact. It allows participants to identify key contacts and prepares them to make a plan to engage those contacts.

Strengths and Limitations

Understanding the distribution of power related to an issue is crucial at the start of a project. Because “power” is a broad idea, focusing on actual influence rather than official status, this exercise can help a group to identify their existing resources and allies rather than just focusing on identifying targets for lobbying and persuasion.

However, power mapping will only be as successful as the diversity and experience of those doing the mapping, so it is crucial to ensure your circle of participants broadly represents relevant stakeholders (see Leadership Mapping Tool, pg. &).

IN PRACTICE: The Parkersburg pilot Steering Committee used Power Mapping to consider players relevant to the topic of substance use in town. (Oct 2025)

ROLES AND RESOURCES

A mapping tool: This could be a large sheet of paper or a whiteboard and markers or, alternatively, an online graphics tool.

Participants: All the members of the core leadership team should be present.

NOTE

Having a basic understanding of power is a prerequisite for this exercise. Sometimes attempting a power mapping exercise reveals that the group doesn’t have a clear understanding of power or how power influences the community. Check out this resource to build a baseline understanding of the concept of power.

Power Mapping for Relational Organizing

(Continued)

Method

1. **Identify Networks:** Participants will list out people and groups that are known to have an interest in or an influence on the issue or are salient in the community.
2. **Placement:** As you write out stakeholders on your mapping tool, you can use their visual placement to organize stakeholders. For example, using two axes you could plot stakeholders based on their relative power over an issue as well as their alignment toward or away from supporting that issue.
3. **Understand Types of Power:** Participants will review the stakeholders depicted and consider what kind of power or interest they have. One framework is to consider visible, hidden, and invisible power (explained here&).
4. **Map Gaps:** Participants review the list after having reflected on mapped stakeholders" types of power. This review can review additional actors to create a more holistic understanding of power related to an issue.
5. **Select Priority Contacts:** Review your map and consider which stakeholders can support the campaign to obtain more influence, how messaging can be tweaked, and who can champion the campaign, based on their power and support alignment.
6. **Set a goal and make a plan:** If participants agree on who are priority stakeholders or power brokers who might have leverage for a project, set a goal to contact that group or person within a set amount of time with the intention to understand and test assumptions about how this group or person can be influenced towards action that advances the project forward.
7. **Follow Up & Reflect:** After the meeting, assess what you learned and record relevant action items. These reflections could be incorporated into future mapping exercises.

ADDITIONAL CONSIDERATIONS

Use SMART Goals: Designing goals are Specific, Measurable, Achievable, Realistic, and Timely will facilitate their implementation

Think beyond your usual circles: Participants should attempt to list all key stakeholders who are relevant to an issue, especially those with invisible power who may not be otherwise considered.

Make outreach a habit: This exercise is not meant to be done only once. Especially as a team grows and strategic goals change, repeating this can ensure the team doesn't lose sight of potential allies and opportunities.

RESOURCES

→ Power Mapping

→ About Power

One-on-One Relational Meetings

Credit: Ben Fink

Overview
One-on-one relational meetings are a means to intentionally build and strengthen relationships, to learn about what motivates someone to act, and to find mutually beneficial connections. A one-on-one relational meeting is not just a typical open-ended conversation and is not held with an intention of pitching the project to someone or persuading them to share one's perspective. The goal of this tool is to understand another person, their motivations and interests, and also how you could support each other's work.

Strengths and Limitations
One-on-one meetings themselves are enormously powerful, and are often a pathway to identifying new leaders or volunteers, organizational partnerships, and important context and information. A single meeting, however, is just a starting point and may not lead to immediate next steps. Even meetings without next steps can be advantageous if they surface information and context important to your project.

ROLES AND RESOURCES

Initiator of contact

Person being contacted

One-on-One Relational Meetings

(Continued)

Method

1. **Set an intention:** Before meeting with the new contact, consider what you know about the person and what you do not yet know, which you hope to learn. You may have other programmatic intentions in mind (e.g. volunteering, another connection, or resource-sharing), but be careful not to let these get in the way of the singular goal of a one-to-one: to get to know the person, what matters to them and drives them to act, and what common interests you may share.
2. **Introductions:** Share relevant information about yourself, such as your background, what organization you represent if any, and why you wanted to meet. From there, you should ask questions to learn more about the other person, including their background and interests. Be mindful to not excessively focus on potential ways they could contribute to your effort, as this could appear extractive.
3. **Understand motivations:** As appropriate, ask probing questions that help you understand not just what the other person cares about, but the "why" underneath their passions. That information can inform a future request of them, whether it takes place during this meeting or in the future. You might ask:
   a. Have you already engaged with [this issue], how so and for how long?
   b. What inspired you to get involved, and what has kept you involved?
   c. What particularly interests you, frustrates you, upsets you, inspires you, etc.?
4. **Make an ask, if appropriate:** If you think there is a strong basis for shared interest, make a modest request of the other person. This might be to come to an event, connect you with another contact, or simply to meet again.
5. **Document and evaluate:** After parting ways, take notes on your conversation. This would include both their motivations and interests as well as potential areas of collaboration. You can also evaluate your own performance in the conversation to improve future meetings.

ADDITIONAL CONSIDERATIONS

Listen more than speak: The most valuable benefit is gaining information and trust. By asking good questions and listening more than speaking, you are likely to earn more of both.

Make an ask specific, if you make an ask at all: Asking for a specific, concrete action, without softening, could improve the chances that they say yes. But more effective, often, is to make no ask at all during the initial meeting – and then get in touch again with the specific ask, a few days later!

Listen to how they refuse: They might be open to working together but not commit to that specific ask – either for logistical reasons or because it's misaligned with their self-interest (and they might be open to a different kind of ask).

RESOURCES

→ One-to-one Meetings and more tools

→ People, Power, and Change the 1:1 Meeting

→ Listening at the Invitation

Steering Committee

Overview
A Steering Committee is typically a group of residents or key stakeholders charged with guiding a participatory process locally and making decisions together about the project's direction. It is designed to improve a project's legitimacy through the make-up of its membership and to create a clear governance structure for the effort.

Strengths and Limitations
A Steering Committee can create a structure for shared leadership by empowering people with relevant lived experience, knowledge, and relationships with making key decisions to guide the project. A Committee that reflects people who influence or are impacted by an issue can also build community ownership, accountability, legitimacy, and access to broader networks and resources.

Steering Committees can also create challenges around accountability and decision-making. It is important to clarify the Committee's role and authority, including which decisions it is charged with making and to what extent members are expected to carry forward the day-to-day work of the project. Without clear expectations, members may be unclear about their responsibilities or feel that their participation is primarily advisory. Compensation can help recognize members' contributions but may also create significant costs for a small team.

IN PRACTICE: The Parkersburg pilot was led by a Steering Committee of local residents. (Jan 2025)

ROLES AND RESOURCES

Chairs/Co-Chairs: convene and facilitate meetings and create agendas

Members: participate in decision-making and implementation of the project

Steering Committee

(Continued)

Practice Details

- **Size:** Steering Committees must be large enough to represent different stakeholders while small enough to ease scheduling and discussion. This may be somewhere between 5 and 12 members.

- **Selection:** Members can be selected through direct appointment or an application process. Considerations for selection of Committee members often include having a group that is representative of the broader population, with a potential emphasis on giving a voice to groups who are not typically in positions of power.

- **Duration:** The Steering Committee should exist for the length of the project, although you might consider having a fixed term for participants to ensure that leadership can sustain and renew over time.

- **Meetings:** The Steering Committee can meet as frequently as is appropriate. Many well-established projects and nonprofits might only have a monthly or quarterly Steering Committee meeting. Alternatively, if the project is intensive and time limited, they may meet more frequently.

- **Compensation:** Committee members benefit in multiple ways from their participation including having influence over an important community project, gaining access to new knowledge, and building new relationships. Financial compensation is an additional way to convey that Committee members' time is valued. Compensation should be especially considered when Committee members are contributing labor that the project would otherwise pay someone to do and/or if the time involved could limit members' time to do other paid work. Stipends may provide a helpful incentive especially for members experiencing financial hardship.

ADDITIONAL CONSIDERATIONS

It is important to consider and clearly communicate the Steering Committee's role and authority. Steering Committees can range from advisory bodies to decision-making bodies, so it is important to clarify what power members have, what decisions are within the Committee's scope, and how the Committee relates to other teams involved in the project.

Consent-Based Decision Making

Credit: Sociocracy; offered in Parkersburg by Participatory Budgeting Project

Overview

Consent-based decision-making is an alternative to both consensus-based decision making, where all stakeholders must agree, and majority-vote decision-making, where proponents of a minority opinion may feel shut out of the process. Consent-based decision-making focuses on significant objections, asking not what people prefer, but if people are willing to "live with" a decision for the sake of efficiently advancing the project. This process ensures dissenting opinions are inclusively heard, considered, and incorporated for the future, while allowing for forward movement that doesn't get bogged down in minor differences of opinion.

Strengths and Limitations

Contrasting with majority-vote decision-making, consent-based decision-making endeavors to capture objections and address them. As a result, this can be a particularly useful tool when unsettled disagreements could create divisions or build resentment among the stakeholders. Because it balances honoring all voices with the need to reach a decision, can be helpful for groups that are new to working together.

IN PRACTICE: The Parkersburg pilot Steering Committee used Consent-based Decision-making to make the key decisions throughout the project, including agreeing upon the Action Plan that they would implement based on the ideas they collected. (Dec 2025)

ROLES AND RESOURCES

Proposer: the person presenting the proposal to the group

Facilitator: the person supporting the group through the decision-making process; this person may or may not be one of the participants.

Participants: the group members who will be deciding on the proposal

Consent-Based Decision Making

(Continued)

Method

1. **Introducing the Process**: The Facilitator reviews the consent-based decision-making process with the participants if they are new to using it.
2. **Present the Proposal**: The Proposer states the proposal or shares a written version. Note: if written, the proposal can be shared in advance of the meeting; make sure everyone is looking at the same draft.
3. **Clarifying Questions Round:** The Facilitator encourages participants to focus on seeking clarification rather than expressing opinions. The Facilitator sets a speaking order. If a participant doesn't have a question, they can "pass." The Proposer responds to these questions one by one or in a batch.
4. **Immediate Reactions Round**: The Facilitator invites immediate reactions from the participants on the proposal. This might be short statements or another method like thumbs-up, thumbs to the side, or thumbs-down. This round follows the same speaking order. If a participant doesn't wish to speak, they can "pass."
5. **Consent Round**: After reactions, the Facilitator will ask each participant, in round order, if they have an objection to the group adopting the proposal. Participants "Consent" or "Object."
6. **Address Objections**: The Facilitator asks questions to understand how the proposal could be made amenable to those who objected. The Facilitator could ask "What would make this proposal workable for you or safe enough for us to try?"
7. **Proposal Revision**: The Proposer will respond to the concerns, either adjusting the Proposal in real-time during the meeting or taking time between meetings. If a path forward is identified to address concerns, the Proposer may reintroduce the Proposal. Steps 1-7 would be repeated until there are no further objections.
8. **Adopt the Proposal**
9. **Record Discussion:** Especially if the proposal receives full consent after overcoming objections, it may be helpful to record/summarize the objections and commit to re-evaluating the Proposal after a set period of trying it out, to see if the concerns played out as anticipated, new concerns arise, and if further adjustment may be warranted.

ADDITIONAL CONSIDERATIONS

The process is not used to debate among multiple options, but at the point that one proposal is ready for full-group consideration.

Identifying a facilitator who understands the decision-makers but does not have a strong interest in the outcome can help to build trust in this process.

If a proposal is being met with objection, consider modifying it to say "We will try this out for one month, and then regroup to reflect on how it worked."

Facilitators can adjust the process as needed. For example, if the group already extensively discussed the proposal, the Clarifying Questions Round could be shortened.

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RESOURCES

→ Decision-making Methods: A Comparison

→ Consent-based Decision-making

Affinity Mapping

Overview
Ideation and sensemaking are two complementary stages for helping a group through open-ended problem-solving. Ideation is the process of producing many ideas or possible solutions. Sensemaking is the process of looking across those ideas to identify themes, patterns, and relationships. Affinity mapping is a form of sensemaking where participants will take a set of ideas that they have created and cluster them based on perceived themes. The result is a shared picture of the group's thinking that can help participants identify patterns, relationships, gaps, or areas for further exploration, and can inform what happens next.

Strengths and Limitations
Affinity mapping is useful when a problem or topic invites many more ideas and solutions than can be implemented. It makes contributions visible and allows themes to emerge from participants rather than being imposed by the facilitator. These themes can also inspire participants to imagine new ideas or find synergies between existing ideas. Affinity mapping is most effective when there are many ideas to make sense of.

IN PRACTICE: The Parkersburg pilot Steering Committee used affinity mapping to make sense of the 550+ ideas they collected from the public about how to address theimpacts of substance use. (July 2025)

ROLES AND RESOURCES

Facilitator: This person serves to explain the activity and move participants between steps. The Facilitator can also engage in brainstorming and idea-clustering, but this is generally left to participants.

Participants.

Mapping tool: This could be sticky notes or cards that can be arranged and clustered on a surface. For virtual meetings, a digital whiteboard could also work.

Affinity Mapping

(Continued)

Method

1. **Define the Question and Set Expectations:** The Facilitator will introduce a clear prompt or challenge and explain that the group will first generate ideas and then organize them to understand common themes.
2. **Brainstorm Ideas**: The Facilitator will ask participants to suggest as many relevant ideas as possible. This can happen as a full group, in pairs, or in small groups. Someone should capture each distinct idea on its own sticky note or card.
3. **Make Ideas Visible**: Participants will place all ideas on a wall, board, table, or digital whiteboard where everyone can see them. Depending on the number of participants, it may be worthwhile to produce duplicates of each idea so that multiple groups can work on the next step simultaneously.
4. **Cluster Related Ideas**: Participants move similar or connected ideas into clusters. The Facilitator can help by suggesting examples, although it is important to avoid imposing categories too early. The value of the activity is seeing what participants organically cluster.
5. **Discuss and Name the Clusters:** The Facilitator will invite participants to explain why ideas belong together, move ideas between groups if a better match is found, and give each cluster a short descriptive name. Disagreements may reveal different interpretations, needs, or perspectives that are important to the sensemaking process, rather than something that needs to be resolved. The benefit of the activity is that it supports participants to see patterns and make sense of the contributions.
6. **Reflect on the Map**: The Facilitator will then support the participants in reflecting on the map of the clusters. They may ask: What patterns are emerging? What relationships are surprising? What tensions or differences are important? What's missing? What new questions or possibilities does this raise? This is the main sensemaking stage: participants are interpreting the pool of ideas as a whole. This might be an opportunity for participants to produce new ideas that were inspired by the connections made during the sensemaking effort.
7. **Document the Results**: The Facilitator will photograph the map or save the digital board, along with cluster names and any important observations or disagreements, for future consideration.

ADDITIONAL CONSIDERATIONS

Breakouts for Groupings: Having too many people try to arrange an affinity map at the same time can present a challenge as different participants hold different views of how each idea fits together. Breaking into smaller groups, where those different ideas can be more fully explored, may work better than remaining in one large group.

The Process is the Product: Ideas do not need to definitively fall into a single group, and there is no need to prioritize one cluster of ideas over another. The value of the process is in the comparison and consideration, so it is most important to reflect on the new ideas or connections that people make during the process.

RESOURCES

→ Affinity Mapping

Idea Analysis

Overview

Analysis is the stage of a deliberative process where participants move from generating and organizing ideas toward comparing their relative strengths and trade-offs. Unlike ideation and sensemaking, which broaden the conversation, this analysis asks participants to apply criteria to individual ideas before deciding which are most promising. This activity combines two analysis tools: a SWOT analysis, which examines the Strengths, Weaknesses, Opportunities, and Threats associated with an idea, and an Impact-Effort Analysis, which compares ideas based on their potential impact and the effort required to implement them. Used together, participants can first explore each idea in greater depth and then compare the analyzed ideas visually.

Strengths and Limitations

Pairing these tools helps participants consider ideas from several perspectives. SWOT analysis encourages a fuller discussion of benefits, drawbacks, opportunities, and risks, while Impact-Effort Analysis makes trade-offs between ideas easier to assess. Both of these activities come with limitations, however. Conducting a SWOT analysis may not be practical if participants have more than a few promising ideas. An Impact-Effort Analysis only focuses on two criteria, while participants may also want to consider many others including risk or equity.

ROLES AND RESOURCES

Facilitator: This person will explain the two activities, guide participants through the analysis, and help the group apply criteria consistently.

Participants: Participants will analyze the ideas and discuss their reasoning.

Worksheets: If working using paper instead of digital platforms, participants may need SWOT worksheets and potentially poster paper and markers for an Impact-Effort chart.

Idea Analysis

(Continued)

Method

1. **Define the Ideas under Consideration:** The Facilitator will introduce the activities and then the ideas under consideration. If there are too many ideas to examine meaningfully, participants should first narrow the list to a manageable subset.
2. **Conduct a SWOT Analysis:** The Facilitator will explain that participants will consider each idea's Strengths, Weaknesses, Opportunities, and Threats. Strengths and weaknesses can focus on characteristics of the idea itself, while opportunities and threats can help participants consider outside circumstances that could help or hinder its success. This can be done as one group or in breakouts, with small groups analyzing different ideas and then reporting back.
3. **Share the SWOT Analyses:** The Facilitator will bring participants together to review the results. Participants can add considerations that were missed and clarify differences in how they evaluated each idea. Disagreements do not need to be resolved; they can provide useful information about uncertainty or different perspectives.
4. **Plot ideas on the Impact-Effort Map:** The Facilitator will display a chart with potential impact on one axis and required effort on the other. The goal is to compare ideas and visualize the trade-offs between them. The two criteria can be changed depending on the group's needs. The group could either have each participant place ideas where they see fit and compare, or work collaboratively on one chart.
5. **Reflect on the Impact-Effort Map:** The Facilitator will ask what the map reveals. Some ideas may appear to be relatively high-impact and low-effort, while others may require substantial effort but offer greater long-term benefits. The purpose is not necessarily to select a winner, but to make trade-offs clearer before prioritization or decision-making.
6. **Document the Results:** The Facilitator will save the SWOT analyses and photograph or export the Impact-Effort map, including important disagreements or assumptions, for future consideration.

ADDITIONAL CONSIDERATIONS

Narrow Before Going Deep: SWOT analysis becomes difficult when participants are evaluating a long list of ideas. If necessary, use an earlier sensemaking or prioritization activity to identify a smaller number of promising ideas before beginning this process.

Value in the Subjective Discussion: Neither impact nor effort is purely objective. Participants may have different understandings of what counts as high impact or significant effort, so the discussion explaining an idea's placement can be as valuable as the final map.

Evaluation is not Prioritization: This activity helps participants understand the strengths and trade-offs of different ideas. A separate voting, prioritization, or decision-making process may still be needed to determine what the group will actually pursue.

RESOURCES

→ Friends, Foes, and Forces: SWOT Analysis

→ SWOT Assessment (SNAP Action Guide pgs. 111)