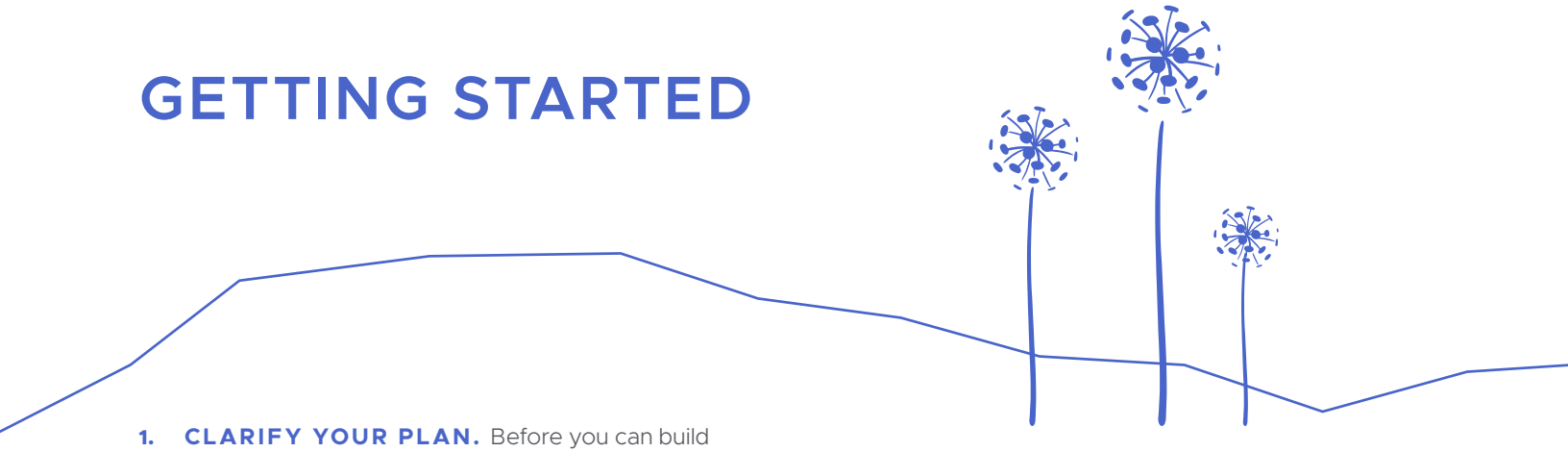
COLIBERATE PROCESS OVERVIEW

GETTING STARTED



1. **CLARIFY YOUR PLAN.** Before you can build out your team, you'll need to be able to explain to people why they should join you. Here are some general aspects of the project for you to make decisions about (as the lead facilitator, or with a larger coalition if it exists).

   - **Broad goals.** Don't get too specific, that is for the research team to decide.
   - **Length and phases of the project.** How long do you think it will take to realistically achieve your goals? Break the work into phases and cycles and recruit a team for those first parts. For example, if you are building towards a two year project, make that clear up front and contract with the team for just the first phase of 6-9 months that they can realistically commit to. Identify as you go who can continue past the 6 months, and begin adding folks to your team who can join before the next 6 month mark to support continuity.
   - **General schedule.** Are you meeting once a week for 2.5 hours, with a retreat at the beginning and near the end? Every other week for 4 hours? Review the curriculum with an eye towards how long tool development, data collection and data analysis may take for your project. What about action and reflection? Do you want the researchers to stay involved for whatever campaign or coalition may emerge? How many meetings might be needed to support that next step? Perhaps meeting frequency will change post research. Draft a plan for that, and make decisions as a group for how to change the plan as the work unfolds.
   - **Incentives.** Other than feeling great about being part of supporting positive change in their community, what are you offering people? How much of a stipend? Job referrals? School credit? Snacks? We strongly recommend paying researchers with at least a stipend. This is a lot of work, and they are bringing a ton of life experience to this job. They should be respected as the researchers that they are or are becoming. Payment is a form of respect in our economic system. Also, in order to take time out of their busy lives, getting paid may be required for many participants.
   - **Location.** Secure a room that you can have access to regularly that has the option of open seating in a circle with as many chairs as you want to have on your team, plus a few more for when you have guests. Make sure you have walls to stick on flipchart paper. You will need a few tables or writing surfaces as well.

2. **BUILD YOUR TEAM.** Because the team shapes everything, who is recruited and selected to be on the team, and how they are brought in is crucial and should be approached with clear, intentional parameters. We recommend establishing a team that is made up of people with:

   - **First-hand experience of the problems.** This might be redundant to put here, but it's kind of the whole point.Those who are or will be most directly impacted by climate related injustices should make up the majority of the team, and be stipended for their work.

- **A range of perspectives.** Look for people who come from different perspectives who may experience impacts in different ways. If a team is missing key viewpoints from the community it's seeking to connect to and represent, the plans you generate may not be perceived as beneficial by some and could be thwarted by conflict.

- **A range of skills and experience.** Along with community residents who are centered in this process, recruit academic researchers, organizational staff and other community allies to be part of your team. These team members won't be determining the goals, research design or the final products and may not show up to every session, however they can be pivotal in giving this project "wings".

- **Capacity for implementation.** The inquiry phase may take so much time and energy to get through that some team members may need to return to the rest of their lives at that point and the team fizzles out before implementation gets underway. Consider recruiting a team large enough that it can "penguin" - where members rotate in and out for different phases - much like how penguins take turns in the center of a huddle during a storm so no one is on the cold outer ring for too long. If you do this, make sure there is sufficient overlap and staggering among members that continuity is not lost.

In order to successfully establish such a spectacular team, we recommend the following process:

1. Outreach to members of grassroots organizations or residents actively engaged in their communities or schools. Consider developing a small graphic that can be shared on social media or in newsletters with links to an online application. Ask your partners and allies to share as well.
2. Seek out potential partners who already share your broad goals and principles. These might be university faculty or students interested in community engaged research or non-profit organizations wanting to ensure their work is aligned with community needs and strategies. Look online to find out who is already doing something similar and talk with them. Find out what their relationship to the community is, and what research needs, priorities or expectations they have (or others have of them). Before formally inviting anyone, ensure that these needs won't interfere with the community member's needs or unfolding process.
3. Host online and in-person events. Share a presentation to inspire people to apply to be part of the team and answer their questions. Include time for filling out the application.
4. Invite applications and interview finalists. While this isn't a formal "job", it's important to at least have a conversation to review the commitments. Share what they can expect, what their role is, what the incentives are, and what you expect from them. Be sure they can actually commit to the entire process before "hiring" them, or selecting them for the team. Many groups skip this step and then lose folks along the way who didn't realize how much work they were signing up for.

3. **PLAN WITH THE NEW TEAM.** Host an informal meet-and-greet with the selected team, review roles and identify who wants to help co-facilitate. Then you can work with those volunteers to develop the first agendas using this curriculum.

KEY ROLES IN THE COLIBERATE PROCESS

TEAM

LOCAL COMMUNITY RESEARCHERS

They are community members directly impacted by the issues. Their role is to:

- make decisions collectively regarding each step of the process
- support facilitation
- design the research plan
- collect data
- collaborate to analyze data, develop strategies, actions and next steps

ALLIED COLLABORATORS

These are experts in the field, academic researchers, other stakeholders, community leaders, current or potential future coalition members and community members who may or may not have the capacity to commit to the entire process but want to support when they can. Somethings they can provide are:

- consultation for decisions regarding each step of the process
- technical assistance with research design, data collection and analysis.
- feedback on draft data collection tools, reports or plans.
- introductions for interviews or outreach for focus groups or events.
- workshops to level everyone up on useful background information or skills.
- support for implementation and transition to another cycle of this process with more stakeholders.

FACILITATORS

FACILITATOR(S)

You! The audience for this curriculum. Often facilitators are organizers or "bridges" who work in between the community and academic, government or foundation allies, and/ or include local community researchers or academic researchers. Their role is to:

- organize and promote the project
- identify the team
- orient and support team-members to conduct the research
- support them through the entire cycle
- see *Your Role as a Facilitator* (pg. 42)

CONSULTANT FACILITATORS

They are professional facilitators with experience in this curriculum. Their role is to:

- support local facilitators with curriculum, coaching and training
- facilitate "big" pieces such as summits or data analysis, if needed

STRUCTURE OF THE COLIBERATE PROCESS

The total time commitment for a Coliberate Community Planning project can range from one month to two years. The suggested process below is based on about 40 hours of in-person meetings and community outreach that can be stretched or condensed in multiple ways. Sandwiching the bulk of the work in between a research design retreat and data analysis retreat will allow for fewer meetings and a shorter overall time.

So although you can stretch or condense the schedule to fit your needs, the following format is suggested for a 3-9 month timeline (starting after the team has been identified and is ready to begin).

1-2 DAY LAUNCH RETREAT

2-6 MONTHS OF FINALIZING TOOL AND DATA COLLECTION

1-2 DAY DATA ANALYSIS AND REPORT WRITING/ PRESENTATION RETREAT

1-3 MORE WEEKS OF PLANNING

COMMUNITY PRESENTATION OF FINDINGS

ACTION AND IMPLEMENTATION

REFLECTION AND PLANNING FOR THE NEXT CYCLE WITH A BROADER COALITION

Adapting for Online Meetings

While this process was developed exclusively through in-person sessions, some of this work can be done online. A key factor for success is having a group agreement to simulate an in-person experience as much as possible. Here are some ways to do that:

- Ask that people set aside time to be as present as possible for the entire duration of the session, with the tech needed. Ensure all participants have access to a computer and reliable internet - include this expense in your budget if necessary.
- Replace physical posters and post-its with jointly editable slides or document platforms.
- Get creative with adapting the warm-up games: invite participants to use their square image as their canvas to share objects from their lives, create images (see *Milling* pg. 159), or stage a photo or gif in response to the various Check-in prompts (pg. 152)

A note of caution: Collective data analysis online is almost impossible. It can be done, but may (in our experience) quadruple the time it would normally take. If you have to have most of the work online, but can come together once or twice, prioritize coming together for in-person analysis.