



Evaluation of Community-Driven Planning Facilitation



Background

The National Association of Climate Resilience Planners is investing in community-based facilitative leaders who are accountable to their communities. In the facilitation certification program, one of the expectations is that facilitators will be evaluated by the community members who participate in the community-driven planning process that they facilitate.

Purpose

The purpose of this evaluation tool is to provide the facilitator with concrete feedback from the perspective of a participant in the planning process so that they may continue to grow and deepen their practice and their accountability to communities..

Process

1. The facilitator identifies a minimum of three participants in the community-driven planning process, and asks them if they would be willing to evaluate the process and the facilitation of the process. Make sure they have been engaged throughout the process, and have enough experience in the process to respond to the questions in the evaluation.
2. The facilitator gives the three community members a brief presentation of the evaluation process using the [slides](#) provided. The purpose of this presentation is to make sure the community evaluators are clear about the process and understand all the content in the evaluation. You can do this presentation anytime during the planning process.
3. Once the planning process is complete, the facilitator asks the evaluators to complete the evaluation. There are two ways the community evaluators can complete the evaluation – through a [survey link](#) OR using this [handout version](#). They could complete it on their own or as part of a group meeting and discussion.
4. The facilitator reflects on the feedback they have received and develops a personal development plan based on what they learned about their facilitation / community-driven planning practice through the evaluation process.

Essential Elements of Community-Driven Plan

A community-driven plan can have many different elements depending on the community developing the plan, and the project that it is focused on. But there are several essential elements outlined below that are important to be included in any community-driven plan.

- ☐ **A DEFINITION OF THE COMMUNITY** that is driving the planning process (who the planning process is by and for). For example: residents of a particular zip code or clearly defined neighborhood, a particular racial demographic in a city or county, previously incarcerated residents, artists, undocumented workers, residents with unstable housing in a particular geography, members of a specific community-based organization or alliance. Whoever is driving the planning process must be clearly defined. It is not okay for the planning process to be conducted by people who are not a part of the defined community, or not directly impacted by the issues the planning process aims to address. If the facilitator(s) are not part of the defined community, then it is important to have members of the community helping to design & co-facilitate the process.
- ☐ **A VISION FOR THE FUTURE** that has been articulated collectively by a large representation of community members. The vision can be larger scale (for the community as a whole) or more focused (for one aspect of the community, such as green space, or for one specific project). The vision should have an outlook of no less than 3 years, and no more than 140 years).
- ☐ **A SET OF VALUES AND/OR PRIORITIES** that are related to the vision, and make it more concrete. Examples of priorities: education justice, housing for all, anti-racist democracy, food sovereignty, etc.). Examples of community values: mutual aid, inclusion, cultural expression, etc. It is important that there be a democratic process by which a large number of community members collectively align on their shared values/priorities.
- ☐ **ONE OR MORE CONCRETE SOLUTIONS** that the community can organize around in the near term to translate the priorities into concrete changes that improve the quality of life for community members.
- ☐ **A COMMUNITY POWER-BUILDING STRATEGY** that lays out concrete steps that those involved in the planning can take to build the political, economic, and/or cultural power needed to advance the solution(s) outlined in the plan.
- ☐ **OTHER** The plan can include as many other elements as those engaged in the planning process decide it needs. If your plan has other elements, indicate that here:

Facilitator Skills & Qualities

A • EMBODIMENT & PRESENCE

Embodiment & presence refers to how the facilitator shows up, their energy, focus, orientation, and vibe. Ideally, the facilitator has a positive vibe and shows up in ways that reflect the values of the community and support a participatory process.

B • PURPOSE CLARITY

The facilitator helps the group name the driving motivation for engaging in a planning process: Why are we doing this? To what end? What are the goals? The facilitator continually clarifies the purpose and goals of planning process, and helps put the purpose and goals into practice.

C • CONTENT

The facilitator works with the core team (and partners) to ensure topics covered in the planning process are focused on meeting real community needs and strengths. The planning content should genuinely engage community members in developing a shared vision, an understanding of the problem(s) the community is facing, solutions that address the root causes of the problem, and a power-building strategy to advance the solutions.

D • PROCESS DESIGN

The facilitator works with the core team to design planning activities that are joyful, creative, life-affirming, and meet the goals of the planning process. It is important to design a good flow of the activities in which each new element builds on the last, and there are lots of different ways for people to participate.

E • AUTHENTIC INCLUSION PRACTICES

The facilitator(s) and core team ensure that those most impacted by the issue(s) the plan seeks to address have what they need in order to participate. This may include accessible spaces, [disability justice](#), [language justice](#), accessible timing of activities, and opportunities to play leadership roles within the planning process, as well as meeting needs such as transportation, child care, meals, and/or stipends for participation.

F • LISTENING

A major role of the facilitator is to ensure that community members are seen and heard. Community-driven planning facilitators are open to new possibilities, listening with genuine curiosity for the vision, values, priorities, and liberatory power of the community.

G • EMBRACING HEALTHY TENSIONS

When communities work to develop shared vision, solutions, and aligned power-building strategies, healthy tensions arise. If we avoid these tensions, we end up including everything in the plan and there aren't clear priorities for coordinated action.

H • DOCUMENTING COMMUNITY INSIGHTS

The facilitator(s) ensure(s) that there are creative, effective and participatory ways to capture the insights of the community members that participate in the planning process.

I • SYNTHESIS & NARRATIVE

The facilitator(s) synthesize (or summarize) community insights in helpful ways, uplifting major themes without losing the depth and complexity of what community members share. Ideally, the facilitator(s) synthesize community insights into a clear narrative that inspires people to action.

J • POWER IN ACTION

Planning is not about the plan; it is about the coordinated action that the plan inspires. Actions can take many forms from fund development to demonstrating in front of city hall to building a community land trust. Actions indicated in the plan should reflect the strengths and priorities of the community members and orgs that participate in the planning, and help build community power. In order for people and groups to take coordinated action, the facilitator(s) help people and groups to see their unique strengths and play their relevant role

Rubric

The matrix (or rubric) below is designed to give direct feedback to the facilitator(s) of the community-driven planning process. Evaluators from the community will identify which statements feel the most true to their experiences in the planning process.

5 ABOVE EXPECTATIONS	4 MEETS EXPECTATIONS	3 A LITTLE BIT BELOW EXPECTATION	2 SIGNIFICANTLY BELOW EXPECTATIONS	1 OFF BASE OR EVEN HARMFUL
A • Embodiment & Presence				
Inspiring presence; embodies community values powerfully, bringing out the best in others	Effective presence; shows up in ways that help move the process forward	Average presence; hasn't done anything to inhibit the process	Sometimes challenging presence; at times gets in the way of moving the process forward	Disrespectful; does not uphold community values; way of being is distracting, holds process back
B • Purpose Clarity				
Very clear sense of purpose guided us throughout the process; helped us navigate challenges; was developed collaboratively and very relevant to community needs and strengths	Clear purpose relevant to the community, was regularly stated and helpful to keep us on track; always understood why we were doing a particular activity	Somewhat clear purpose; sort of guided the process Or clear purpose but could have been more relevant to the community	Vague purpose; restated a couple of times; not sure where it came from; didn't seem to guide the process much Or somewhat clear purpose but not relevant to the community	Felt like we were all over the place without any clear purpose to guide us; wasn't sure why we were doing the activities we were doing
C • Content				
Meaningful and productive activities helped us	Activities made sense and helped us develop a	Activities were sometimes a little unclear or only	Activities were often a little unclear or less	Activities did not make sense, were confusing;

articulate our vision, values, priorities, solutions, and power-building strategy; content resonated with the community	plan that includes a vision, priorities, at least one solution to advance our priorities, and a power-building strategy to get there	somewhat helpful in articulating our vision, priorities, solution(s), and power building strategy; or didn't totally resonate with the community; or some content was missing	helpful in articulating our vision, priorities, solution(s), and power building strategy; or didn't resonate with the community; or significant content was missing	or did not help us develop a plan; or the activities was harmful in some way to community members
D • Process Design				
The process was collaboratively designed and had a powerful flow in which each activity built on the last and prepared us for what we would do next; it felt joyful, life-affirming and reflected our purpose and values	The process was collaboratively designed and had an effective flow in which each activity built on the last; it sufficiently reflected our purpose and values	The process was somewhat collaboratively designed; the activities could have flowed together a little bit better; it somewhat reflected our purpose and values	Not sure how the process was designed; felt choppy at times; or didn't seem to reflect our purpose and values	The process felt imposed on us by the facilitator(s); was disjointed or unclear
E • Authentic Inclusion				
Those most impacted by the issues addressed in the planning have played leadership roles in the process, which fully met participation needs, and created a deep sense of belonging and ownership over the process	The facilitator(s) and organizer(s) made sure that the participation needs of those most impacted by the issues were able to fully participate throughout the process	Participation needs were mostly met, and the activities were somewhat accessible to all, including those most impacted by the issues	There was some attempt to meet the needs of those most impacted by the issues, but they were in sufficient to ensure consistent participation in the process	Very little to no attempt to ensure the participation needs were met resulted in those most impacted by the issues being marginalized from the planning process
F • Listening				
The facilitator(s) ensured everyone felt fully seen and heard, which inspired a new	The facilitator(s) ensured that people felt seen and heard, which allowed for	People felt somewhat seen and heard; participation was a little less than sufficient as	Facilitators lacked adequate listening skills which inhibited	Facilitators disregarded and/or disrespected community members

level of community participation; they showed up with genuine curiosity, openness and deep respect for community knowledge	sufficient community participation	a result and/or a few community insights were missed	community participation and/or lost important community insights	insights; which created harm
G • Embracing Healthy Tensions				
As a result of the facilitator(s)' approach to embracing tensions within the community, we had powerful breakthroughs that allowed us to have needed conversations, make intentional choices about which priorities we will organize around, and significantly strengthen relationships in the community. Existing tensions felt not only useful but transformational.	The facilitator(s) skillfully worked with tensions, making sure we had the tough conversations needed to decide on a clear set of actionable priorities. In this way, tensions within the group felt useful to help us understand what is really important to us, and to make intentional choices about the solutions we will organize around.	The facilitator(s) worked with tensions somewhat skillfully; we had some tough conversations but not sufficient to make all the necessary decisions to really feel aligned on a set of actionable priorities. At times tensions within the group felt like a burden, or a barrier to moving forward.	The facilitator(s) made an attempt/s to address tensions but they were not successful – we were not able to make collective decisions.	Tensions served as a barrier for moving forward, caused harm to the group, or they were completely ignored by the facilitator(s)
H • Documenting insights				
The facilitator(s) used creative methods for documenting community insights that inspired participation; people could see their voices mattered in concrete ways	The facilitator(s) used effective methods for documenting what community members shared throughout the planning process	The facilitator(s) used somewhat effective methods for documenting what community members shared throughout the planning process	The methods facilitators used to document what community members shared were not very effective	It was unclear how community insights were being documented
I • Synthesis & Narrative				
Throughout the process, the facilitators lifted up the	Throughout the process, facilitators summarized	The facilitators sometimes summarized what the	The facilitators' attempts to summarize what the	Facilitators either did not summarize what

major themes the community expressed in ways that inspired participation and created a clear throughline across all the activities; they clearly understand what the community is saying and helped us transform that into an inspiring narrative	the major themes the community expressed, and helped us articulate a sufficient narrative to achieve our goals	community was saying; sometimes the summary didn't fully reflect what the community was saying. They helped us articulate somewhat of a narrative but it feels incomplete or less than sufficient to achieve our goals	community is saying were significantly lacking and did not help us to achieve our goals	the community is saying or did so in ways that felt like they were pushing their own agenda
J • Power in Action				
The facilitator(s) helped us more fully understand our own power and the different forms it takes (political, economic, cultural), and helped us to develop a liberating power-building strategy to advance the transformative solutions we identified; they helped us to see practice our capacity to affect change and transformation throughout the planning process; everyone who participated has a clear role in carrying out our plan that plays to their strengths	It was clear throughout the process that one of the major goals of the planning process was to build community power. We identified ways to do that both in the power-building section of the plan and the planning process itself (for example, community members played leadership roles in the process.) There are clear roles for community members and/or groups to play in putting the plan into action	It was somewhat clear that community power-building was a goal of the planning process; the power-building strategy feels somewhat adequate to achieve our goals	Community power-building as a goal of the planning process and as a strategy in our community plan was significantly lacking. It felt like the facilitator(s) might now have a clear understanding of power or how to build community power. It's doubtful that the plan will translate into community action	The community power-building element of the planning process was so lacking that it didn't even feel community driven. Community members felt disempowered in the process. There is no community power-building strategy in the plan or if there is, it is top-down, not inclusive, or not at all a reflection of the actual strengths of the community

Final Questions for Community Evaluators:

1. What do you appreciate most about this facilitator/these facilitators? Anything that stood out to you about this/these facilitator(s) that you want to uplift?
2. What would you suggest they focus on as they continue to strengthen their facilitation practice?
3. What support could this facilitator/these facilitator(s) benefit from moving forward?

Reflection Questions for Community-Based Facilitators:

Click here to respond to these questions via the [Google Form](#).

1. What did you learn about your facilitation / community-driven planning practice and skills through the evaluation process?
2. What facilitative leadership strengths do you bring to this work?
3. What are your strengths when it comes to the practice of community-driven planning?
4. What areas of improvement and personal growth will you focus on to deepen your practice as a facilitator?
5. What learning goals do you have when it comes to the practice of community-driven planning?
6. What support could this facilitator/these facilitator(s) benefit from moving forward?