

## ***Engaging Differences for Powerful Projects***

### **A Tool Kit**

So you have a great idea - or a small group of you have a great idea. It is a vision that ignites your passion. You think it will help build a stronger community.

This Tool Kit can be used as a resource to help you bring that vision to life.

It includes:

- a process that can help you get very clear about the essence of your **vision** ~ to articulate the intention and purpose(s) you hope to achieve,
- a **flow-chart** that will enable you to stay focused on your intention while you work through the details to get you there,
- some basic **principles of working with others** that will provide a reality check for your own ideas and intuition,
- stories from a **real-life example** that reveal several “lessons learned” from one group that received a grant from the Department of Neighborhoods.

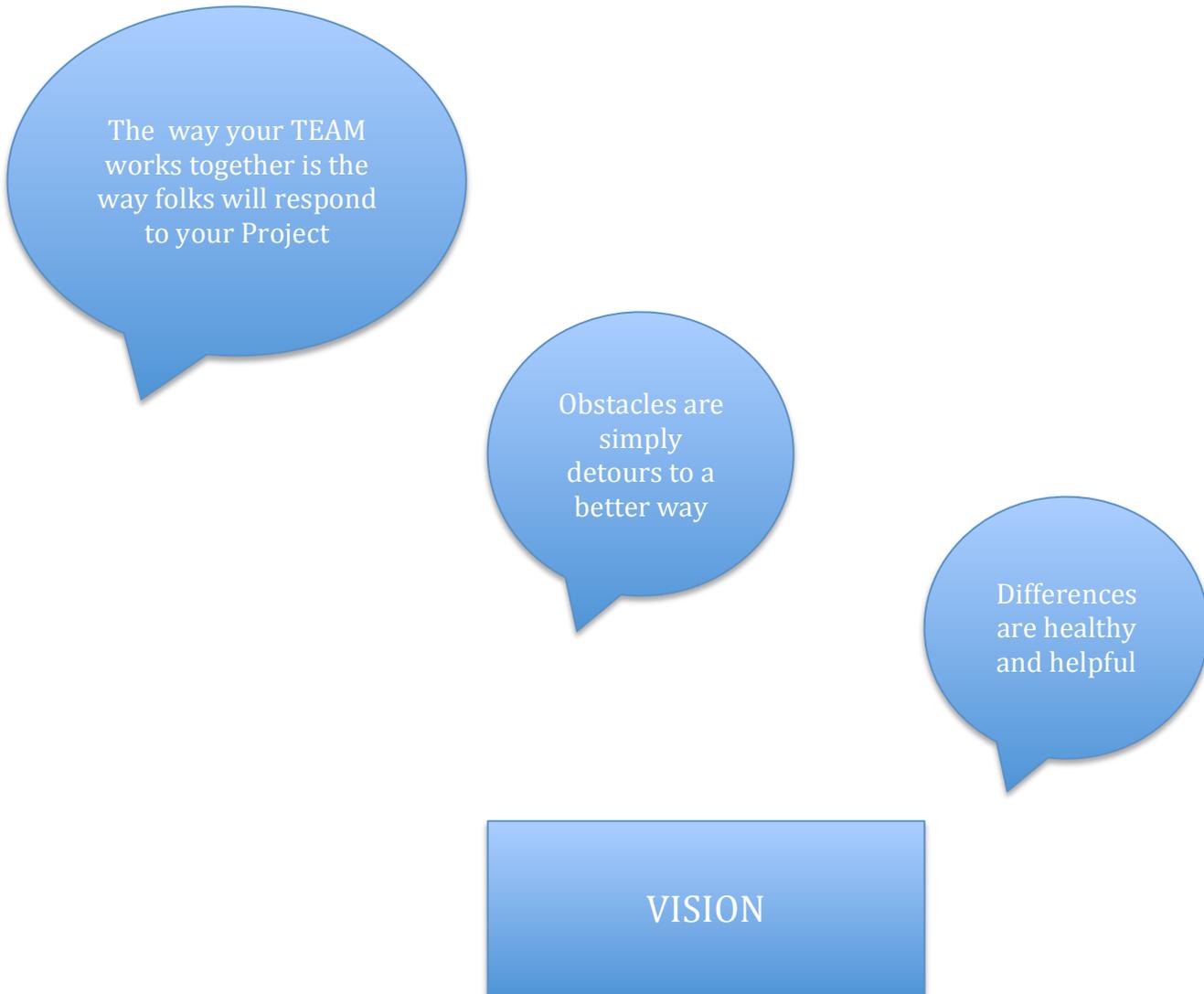
#### ***Some ideas to hang on to:***



People commit to  
what they create!



Folks don't resist  
change ~ they resist  
BEING CHANGED



A vision is often a fragile thing, like a baby plant. It isn't something you want to run share with a person who may be critical. Instead it is something to "nurture" and "grow" a bit. Invest some time in it. Imagine it fully realized: What does it look like? What colors do you see as you imagine it? What sounds do you hear? Who is there? What are they doing? What emotions do you see? How do you feel as you experience the vision as fully realized? Make your vision as tangible as possible.

And while you are doing that, consider who else you know who might get excited about your vision. These are the people you want to share it with. And even these folks may think it is a great idea, but not really achievable. That's OK. Talk with them about it. What most excites them about the idea? If it could be accomplished, what would the benefits be? Ask them if they would like to

give it some thought and then talk with you some more. Set a time a week or so out to have a second conversation.

Ellen Sirleaf Johnson, President of Liberia, advises that “If our dreams don’t scare us, they aren’t big enough.” There is indeed a time to be practical, but the initial Vision is not that place.



When you have two or three, or six to ten other people who are excited about the vision, invest time together hearing one another’s description of how they imagine the vision fully realized. Imagine together the benefits that could come to your community. As you listen to one another, be attuned to subtle shifts of the vision. Moving from one person’s vision, to **Shared Vision**, is a critical first step in any project – **BECAUSE** it is this vision that will guide every other decision you make. Many projects get “derailed” when, weeks or months down the road, team members discover they are not at all aligned around a single vision. **(See the Story, The Power of Shared Vision,” Tab 3)**

You may have more than one meeting where you focus specifically on this question: What are we wanting to create? What is the purpose we want to achieve? **There are sample worksheets included in this Toolkit that can be useful in planning these meetings.**

Even when you think you are aligned enough around the purpose to organize for your work together – include in **every** meeting some time to focus together on “Why are we here?” “What are we wanting to achieve together?” This is essential. The only way you, as a group, can “Steer” the Project” is if you are aligned around the direction and outcome you intend to create.

### **“Who is WE?”**

An important part of these conversations includes getting to know one another. Each individual should be encouraged to share what he or she wants to get out of their participation, and what skills he or she brings to the Team. Some may be motivated because they’ve had this dream for the community for a long time. Others are interested because they want to be a part of a Team doing meaningful work together, or because they want to enhance their leadership

skills. Some may bring organizational skills, others may bring skills of helping people work together and appreciate one another, others may have good knowledge of the community, or networking skills.

The other thing you are accomplishing through these first conversations – is that you are establishing a critical norm of **listening** well to one another. Listening is not a skill that gets a lot of attention in our busy world. Sometimes people think they are listening when all they are doing is waiting for someone to quit talking so they can talk. As you - members of the Project Team - develop your ability to really **listen to understand** one another’s perspective, you are developing a muscle that will help you realize your vision! (See the story, “**The Power of Listening,**” Tab 3)

Most of us – when we have a good idea – are eager to “get on with it.” We want to figure out “how” to make it happen! HOWEVER – when working with groups, success depends on paying attention to the two dimensions of “**How**” **things happen**. One of those dimensions is **TASK** – the actions needed to create what is desired. The other is **RELATIONSHIP** – Who is involved? What do they bring? What do they hope to get out of this Project? How can we work together? If we don’t invest time and energy in nurturing the **RELATIONSHIPS** of those involved, the **TASKS** will never be accomplished in an effective and integrated way.

For this reason, it is often best to spend the first couple of meetings simply exploring why you want to come together and what you want to accomplish. Agreeing on who will be the temporary “Team Coordinator” is probably as much organization as you need at this point. This person can send out reminders about the meetings and preparation worksheets.

The Red Velvet Bag included in this Tool Kit is one way to help your Team members share their personal motivation for participating in this Project. See **Sample Worksheet # 2** for this activity



By the third or fourth meeting, you may be ready to identify a few specific roles. Avoid “over-organizing.” It may be that a “Team Coordinator” and a “Communicator” are the only roles that are needed. Other team members can then take on specific tasks as needed. Be clear about the expectations of these roles, such as: “Team Coordinator” – Sets Agenda, Facilitates Meetings; “Communicator” Sends Preparation Worksheets out prior to each meeting,

Keeps records of decisions made at each meeting. The other thing that is important at this point is to talk together about **“How do we want to work together?”** What are the 2 – 4 specific commitments members want to make to each other? These might include: I will show up and fully engage at each meeting. I will assume tasks as I can, and complete what I agree to do by the time it is needed. I will promote our Project informally and share my enthusiasm for our purpose. I will encourage persons in my personal networks to engage in this Project with us. These commitments should be written on a piece of chart paper and posted at each meeting!

## REALITY CHECK

Once your Project Team feels connected to one another, and comfortable that they are working together toward achieving a shared vision, it's time to do a **Reality Check**. This does not need to be extensive but it is a crucial step. It is best if ***each member of your Project Team holds a conversation with at least two community folks***. As a Team, identify the people whose perspective would be valuable. Some of these individuals may hold “positions” of leadership, such as the Executive Director of your Community Center or a respected leader in a faith community or a teacher or scout leader. However, others may be a Mom, a local grocery store manager, a barber. Think about who the **“natural leaders”** are. Who do people trust in the community? Whose opinion is highly respected? Who has an interest in the good of the whole community?

The purpose of these conversations is to “test” the likely interest in your Project. You will want to learn from these folks how they imagine your Project might benefit the community? What do they know about this community that will help you develop plans for realizing your vision? Are they interested in being a part of the Project in some way? What might that look like? Are there obstacles that you should know about? Are there resources they can suggest? (Not just money or goods but people who might share your vision).

## Putting “Practical Feet on the Vision ~ Creating the Action Plan

Your Team meeting following the Reality Check conversations will likely be a “juicy” discussion as you share insight you have gained from these folks. As

you integrate the insight and wisdom that has been shared, your vision becomes much richer. You have more clarity about who else sees this as a valuable Project, what benefits are perceived, as well as what challenges or obstacles you may face, This provides the foundation you need to identify the Tasks and Responsibilities necessary to bring your Vision to life.

A good way to capture these important ideas is to have two columns on a white board – one titled: **Potential Resources** (these may be interested individuals or organizations, possible collaboration opportunities, funding sources, venues, knowledge about the community, folks who have experience working with diverse groups, etc.) The other column is titled: **Potential Challenges** (these may be *attitude* by some - “We tried this two years ago and it didn’t work,” no clear sources of funding, apathy, etc.) A photo of this information on the White Board can become part of your records, without requiring one person to take copious notes.

Now, your group has not only your vision, but good data from the community - - and this means you can begin to put “practical feet “ on your vision, by developing your **ACTION PLAN**. **What are the tasks that need to get done to bring your vision to life? Who** will take responsibility for what? **By when?** You can now think beyond the resources within your Team and consider resources in the larger community.

If you learned that there are individuals or groups that are really excited about the Project – your question will be “How do we leverage that?” “What are some practical ways they can help?” If some of what you learned seem like obstacles, your question will be “How do we address this?” “Who can help us think creatively about this?” (Remember – often, perceived Obstacles are really Detours to a better way.)

Create a simple **ACTION PLAN Tracking Document** which includes Tasks, Names of Persons Responsible, and Dates of Completion. Prioritize these tasks so things such as Venue, Date, Budget, Fund-raising and such are addressed first. This Action Plan Tracking Document will be your guide through the rest of your Project. ***It needs to be a working document, reviewed at each meeting with any changes noted on the Plan.*** Your Action Plan will guide your work going forward.

If you are fortunate to **receive funding support from the Department of Neighborhoods**, you have also just connected with a new partner. You will be assigned a “Project Manager” from the Department. This is not someone who will start managing your Project for you. He or she is a liaison between your Team and the Department of Neighborhoods – and an incredible resource! They want your Project to be successful and are very responsive to questions or needs along the way.

## BUILDING MOMENTUM

This is also a good time to create a list of the **ways others can engage** in the Project. Often people want to help, and they need to know your specific needs. It you will need Child Care helpers, donations of money and in-kind products and services, volunteers to clean up a site, folks to distribute your posters or flyers, or folks to help create your posters or flyers – include these needs on your list. As your Project unfolds, this list will need to be updated as some needs are met and others become necessary. **Each team member should share this list with at least 5 persons** in his or her own network, as a way of beginning to “get the word out” and generate interest in your Project.

Two other ways to “build momentum” are worth special mention here:

- **Stay in touch with those Community folks** with whom you had your Reality Check conversations. Keep them informed as your Project unfolds! Touch base with them for suggestions about specific needs. These individuals are likely well-known in the community and may be a great source of referrals.
- Convene “**Community Outreach Conversations.**” These are incredible **keys to the success of your Project!** As a Team, identify groups that may benefit from your Project, or for what-ever reason will likely be interested in it. Determine which Team member will contact which group. **Each Team member:** Use your own contacts or ask for referrals to a member of these groups. Make an appointment to talk with them; share a short description of your Project; tell them you would like their help in arranging an informal meeting with their group. The purpose is to describe your Project, see what their interest is, answer questions.
  - **Why does this work?** Despite social media, person-to-person contact is how trust is built! Knowing someone was interested enough to come meet with the group means a lot! Folks who do choose to come to your Event or support your Project will have positive, realistic expectations!
  - **Remember:** Each step in your plan is an opportunity to engage more members of the community! ***This is how your initial vision becomes a Community Project!*** It is all about building relationships!

- **Managing the Details** As you develop your budget, secure an appropriate venue, raise funds, create publicity, etc. **Let your Action Plan guide you!** Keep it a working document. It will remind you of your progress, reveal tasks yet to be completed, keep you all focused on the final intention of your work together. It can be the Agenda for each meeting:
  - What's been accomplished since we last met?
  - What is our next priority?
  - What are the specific Tasks?
    - Who will do what? \_\_\_\_\_
    - By when? \_\_\_\_\_
  - There may be disagreement. That's OK. How you deal with that as a Team is what is important. Remember, Differences are Healthy and Helpful. **(See the story, "The Generative Power of Differences," Tab 3)**
- **Continue the spiral!** As you move from intention to details, stay connected to the others you've engaged along the way. Reach out to the **"natural leaders"** in the community with whom you first tested out your Vision, and to those who participated in the **Community Outreach Conversations**. Continue to reach out to other networks. You are continuing to expand the spiral of folks interested in the Project.
- As you reach the **Culmination** of your Project ~ allow the energy of nearing the finish line to carry you with enthusiasm! There are three dynamics to manage around the Culmination:
  - **Attention to Details.** Yes, they as important as ever, if not more so. Review TOGETHER, as a Team, the "Finale" in all its splendor – and then double check on all those who will be "helping to make it happen." Is everyone aware of the flow of activities, when and where they need to show up, do you have a 1 person Coordinator for that day to ensure communications flow through a central point, do you have a 5 minute, required "Huddle" prior to start time – when you will together remember the intention of the Project?
  - **Revisit your Shared Vision** – allow the initial passion and compassion that you felt initially for this work to flow through your Team.
  - **Pause for Gratitude! Don't overlook this step!** Take a moment to appreciate all the time, energy and caring that you have invested in this Project. Appreciate those on the Team as you've worked together And appreciate all of the others who have contributed in diverse ways to the Project as it has unfolded.
- **ENJOY THE EVENT!** Whether your Project was creating an Event, or the Event is a ribbon cutting of a pocket park, or . . . . . give your self the gift of relishing this culminating experience!



## Wrap-up

Three activities contribute to a sense of closure for work well done:

- **Celebration** ~ it can be simple, maybe an evening potluck ~ but it is important. This is significant work you've done. Own it. Give yourselves credit!
- **Reflection** ~ EVERY group effort is a learning experience! EVERY Community project is a learning experience. What did you learn? These are treasures. Take time to acknowledge and integrate what you have learned from this experience.
  - Some folks like to use questions like these to prompt this conversation:
    - As you think about your involvement in this Team Project,
      - What surprised you?
      - What inspired you?
      - What challenged you?
      - What had the greatest impact on you?
- **Appreciations** ~
  - **To each other** ~ perhaps going around your circle, each person in turn identifying one appreciation for each other Team member.
  - **To all others who helped** –
    - Keep it simple, but DO IT!
      - Maybe list the individuals and organizations that supported your Project, and beside each one indicate what the appreciation will be – and who will do it.
      - Family members that put up with the hours you devoted to the project – personal Thank You – or maybe ice cream for the family,
      - Folks who helped out in big ways – maybe a Card that all Team Members sign.
      - Folks who helped out at the Event or along the way - Maybe a Thank You card with a picture of the Team, signed by the Team member who worked most closely with this person.

***CONGRATULATIONS TEAM***

## Using the Tool Kit and Sample Worksheets

- **Creating Shared Vision (First Meeting)**
- **Coming Together**
  - **Preparation:** Send out to each person a communication like the one suggested in **Sample Worksheet # 1**
  - At the meeting, begin with a **Check-in** – each person is invited to share one or two sentences that allows them to “let go” of what they’ve been focused on prior to the meeting so they can be fully present at the meeting.
  - This is basically a story-telling meeting where individuals are sharing what the “vision” is, from their perspective, what it means to them and how they are connected to it. It is not about creating a formal statement of the Vision, but rather **listening** to one another share their perspective of it.
  - Invite all to imagine their vision perfectly realized – what do they see? Are there people there? What are they doing? What sounds are heard? Is there color? What are people feeling? What impact can they imagine that the Project will have on life in their community? How might people’s lives be touched?
  - Create a list as these tangible possibilities are expressed. **“Seeing our Vision Realized”** Keep this list for use at future meetings.
- **Who is “WE” ? Sample Worksheet # 2**
  - After conversation about the Vision, it will be good (and fun) to discover “who is here?” One way to do this is to pass around the red velvet bag (in the Tool Kit) and ask each person to:
    - Reach in and take one item. When each person has one, Ask each to share their response to this question: **“In what way does this suggest your feelings about this Project?”** What are two other words that would also be descriptive?”
    - Continue, by asking each person to share what motivates them to participate in this Team, what strengths they bring to this work, and what they personally would like to get out of this experience.
      - It is important to have one person making notes during this part of the conversation, especially identifying what each member brings to the group and wants to receive from working with this Team on this project.
        - See **Sample Worksheet # 3**

- Close the meeting with **Check-out** – a brief statement from each Team member about what they appreciated and what they would change about the meeting.
  - Confirm date, time and location of next meeting.
  - Ask each person to write their contact info
- Sample Worksheet # 4 Team Contact Info**

- **Articulating our purpose (Second Meeting)**
  - **Preparation:** Send out to each Team member a communication like that suggested in **Sample Worksheet # 5**
  - **As folks arrive** ask that each one posts the image / symbol she or he brought around the room (provide blue carpenter's tape)
  - **Post the "Seeing our Vision Realized" chart generated at the first meeting**
  - **Check-in** - What do you need to express in order to be fully present here?
  - This meeting is about the Team creating an initial statement of the purpose of this Project.
  - At the meeting, ask each person to read what they wrote out while the others listen.
  - When each one has been heard, ask that all these papers be turned face-down in the center of the table.
  - Then ask for a scribe – and ask the members of the group, "What did you hear as the essence of this Vision?" People speak up as they choose, Not every person may feel a need to speak.
  - Then ask, "If this purpose is realized will it reflect the impact we imagined at our last meeting? Refer to the posted list.
  - Finally ask: "Is this satisfactory as our initial statement?" Adjust as needed, and assure members that at the following meeting the group will revisit the statement. Keep the chart paper that has the statement on it – for use at the next meeting. **"Statement of our Vision / Purpose"**
  - Then ask that all take a walk around the room to see the images that have been posted. Facilitate a general discussion of responses to these symbols. Have fun with this. Are there 2 or 3 that seem especially appropriate to the essence of our Vision we've articulated? If so, put them on a sheet of chart paper to be used at a future

- meeting. **“Possible Images Communicating our Vision / Purpose.”**
- **Check-out** - What was useful in this meeting? What would you change?
  - **Affirming our Purpose / Preparing for “Reality Check” Conversations (Meeting # \_\_\_\_\_)**
    - Preparation: Send out to each Team member a communication like that suggested in **Sample Worksheet # 6**
    - Post the **“Statement of our Vision / Purpose”** and **“Possible Images Communicating our Vision / Purpose**
    - Begin meeting with **Check-in**.
    - Explain that **this meeting is about determining alignment within the Team about what the Project is about in order to describe it to a few Community Members.**
    - Lead discussion - Does this statement of Purpose express the essence of the Project?
      - If there is significant difference of opinion about the essence of the Project, ask for a 2 minute period of silence so each person can reflect on the conversations at the last meeting and be open into any new insight. Then ask each person to finish this sentence: “How I’m thinking about the ways this Project could benefit our community is \_\_\_\_\_”
      - Having heard from each person, ask “How can we adapt our statement so that it resonates with each of us?”
      - If this still fails to bring agreement, you will need to go with what resonates with most of the folks. Ask for commitment from each person that they can support this statement in describing the Project to community people.
      - Transition to planning for Reality Check conversations.
    - These **“Reality Check” conversations** will provide several benefits: You may want to ask the Team members how they think these Conversations will benefit your Project. List these – and make sure the following are acknowledged as well.

- reveal whether or not others outside the Team understand what the Project is about or if we need a more clear statement of purpose.
- test whether others in the community see the benefits of the Project for the community
- identify others (individuals or groups) who might like to be involved in the Project
- identify potential challenges or obstacles
- identify other resources
- Here is how it will work:
  - We will identify persons in the community whose perspective would be valuable to us:
    - Who are natural leaders in the community?
    - Who do people trust?
    - Whose opinion is highly respected?
    - Who has an interest in the good of the whole community?
  - Facilitate a conversation to identify these individuals. **Create a list of 8 – 10 individuals.**
    - You may want to ask Team members to write their name beside the 2 or 3 they would like to contact.
  - We will also identify the questions we want to discuss with them:
    - Facilitate a conversation to identify these questions. Help the group select the 3 or 4 most important, and # 5 should be: “May I check-in with you again as our Project unfolds?”
  - Facilitate a discussion to identify the most useful questions?
  - Each of us will meet with 2 of these individuals, discuss our questions with them, and report their input at our next meeting. Each of us will use the same questions we selected at this meeting.
  - ***This step holds enormous potential.*** You are building relationships that link the Project to community leaders. You are building trust. By identifying persons who may care about this project, you are honoring them, and gaining their insight and wisdom to apply to your Project. By asking the #5 question, you are inviting the possibility for on-going communication with them.
  - By the end of the meeting provide each team member with a copy of **Sample Worksheet # 7.**

*They should copy the agreed-upon questions on the sheet and also note the 2 individuals they have agreed to meet with. Be sure only 1 Team member will meet with each identified Community Leader. Be sure everyone understands both the purpose and process of meeting with these identified community leaders.*

- **Check-out**
  
- **Absorbing what we’ve heard as we Put Practical Feet on our Vision (Meeting # \_\_\_\_\_)**
  - Preparation: Send out to each Team member a communication like that suggested in **Sample Worksheet # 8 Integrating Community Input**
  - Post the **“Statement of our Vision / Purpose,” “Possible Images Communicating our Vision / Purpose,” and “Seeing our Vision Realized”** charts.
  - Begin meeting with **Check-in**.
  - Facilitate a conversation – “Expanding our Circle” by engaging with Community Leaders – What are we learning?
  - The conversation should be free-form as folks share various aspects of their Conversations.

Comments	Challenges	Suggestions
▪	▪	▪
▪	▪	▪
▪	▪	▪
▪	▪	▪

- Then ask someone to scribe on a large white board: and shift the conversation to specifics. Invite members to share a phrase from their conversations that is a valuable comment, a specific potential challenge or important suggestion.
- Facilitate a conversation about how these insights influence the list of tangible possibilities generated at the first meeting. **“Seeing our Vision Realized.”** Add notes to it as they are mentioned by Team members.
- This annotated list now becomes a description of our Shared Practical Vision. Our next step is to work backwards from this to identify what is

needed in order to get from where we are ~ to ~ our Vision.

- Brainstorm a beginning list of tasks – to seed the thinking prior to the next meeting – where tasks, responsibilities and timelines will be our focus.
- **Check-out** – “Community comments most meaningful to me.,” “What I would change about this meeting.”

- **Creating An Action Plan – to Guide us to our Vision**  
(Meeting # \_\_\_\_\_)

- Preparation: Send out to each Team member a communication like that suggested in **Sample Worksheet # 9**
- Post the 3 charts
  - **“Statement of our Vision / Purpose,”**
  - **“Possible Images Communicating our Vision / Purpose,”**
  - **“Seeing our Vision Realized”**
- Begin meeting with **Check-in**
- **This meeting marks a shift of our energy.** To date, we’ve been focused on getting clear about what we want to accomplish / our Vision. NOW: we turn to **HOW we will accomplish our Vision**– the tasks, responsibilities, time-lines – the all-important details.
- Facilitate a conversation about what has come up for the Team as they have begun to see in their mind the journey to the Vision. After a brief general conversation, **brainstorm** a list of **TASKS** and activities.
- As the brainstorm slows down, ask folks to begin to prioritize. Maybe a star goes beside ones that seem to need to happen first, a circle beside the ones that need to happen next, and a square by the ones that seem less urgent.
- **WHEN** ~ Add approximate date.
- **WHO** ~ **Each task should have a Team member who takes responsibility for it.** This doesn’t mean that she or he will DO the task necessarily, but will be the champion for that task. This means, making sure that the Team addresses the Task, that persons on the Team or ones who are recruited commit to being

responsible for it, that it is tracked at each meeting until it is completed.

- **For example:** If “Sue” is the Team member responsible for Venue, she will ensure that the Team identify the type of facility needed (in terms of numbers of people that can be accommodated, kitchen facilities, location, etc.). She will ensure the Team identify possible venues to scout out and will check these out herself or see that someone else takes this responsibility. She will keep the Team aware of progress and ask for help as needed.
  
- **Balancing Task and Relationship**  
(Meetings # \_\_ - #\_\_)
  - Meetings from this point on will depend on the specific tasks and the time available before your *Finale*. As Team Coordinator, your role becomes the Balance Keeper and the Nurturer.
    - Tension can become palpable as deadlines loom. If you push, you increase that tension. Better – to keep reminding the Team of their Vision. This generates energy. Celebrate steps along the way so progress is clear. Provide support and help prioritize. Structure opportunities for fun – to lighten things up a bit. Bring a Pizza to a meeting. Be generous with appreciation.
    - Create an environment in which Team Members know it is OK to ask for help.

As a reminder of the importance of this last phase of your Project, the sections - Building Momentum AND Wrap-Up from the Team Handbook are reprinted here:



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## Wrap-up

Three activities contribute to a sense of closure for work well done:

- **Celebration** ~ it can be simple, maybe an evening potluck ~ but it is important. This is significant work you've done. Own it. Give yourselves credit!
- **Reflection** ~ EVERY group effort is a learning experience! EVERY Community project is a learning experience. What did you learn? These are treasures. Take time to acknowledge and integrate what you have learned from this experience.
  - Some folks like to use questions like these to prompt this conversation:
    - As you think about your involvement in this Team Project,
      - What surprised you?
      - What inspired you?
      - What challenged you?
      - What had the greatest impact on you?
- **Appreciations** ~
  - **To each other** ~ perhaps going around your circle, each person in turn identifying one appreciation for each other Team member.
  - **To all others who helped –**
    - Keep it simple, but DO IT!
      - Maybe list the individuals and organizations that supported your Project, and beside each one indicate what the appreciation will be – and who will do it.
      - Family members that put up with the hours you devoted to the project – personal Thank You – or maybe ice cream for the family,
      - Folks who helped out in big ways – maybe a Card that all Team Members sign.
      - Folks who helped out at the Event or along the way - Maybe a Thank You card with a picture of the Team, signed by the Team member who worked most closely with this person.

***CONGRATULATIONS TO ALL!***