

Facilitation Tool: Leveraging organizational goals towards a regional vision



Imperial Beach, CA. Photo credit: Dstana (Wikimedia Commons)

Purpose of Discussion Group

- To better understand how to and to encourage people to leverage regional partnerships in moving towards a common vision
- To use the process of developing indicators and metrics (I&Ms) to foster closer collaboration and coordination in working toward a common vision

Target Audience

Agencies and organizations that:

- track I&Ms that are crucial to your agency's decision-making processes;
- have resources that could be leveraged in tracking I&Ms; and/or
- are central to making progress towards your agency's vision or a broader regional vision of adaptation success.

When to Use

Ideally done in the visioning phase, i.e., early in an adaptation process, but can be modified to occur during later phases of the adaptation process (*e.g., during the exploring/identifying and selecting of indicators and metrics*) as well.

Directions

- **Materials needed**
 - Room large enough for multiple break-out group tables (*size dependent on size of group*)
 - Large note pads on easels
 - Sticky notes (*optional*)



This facilitation tool was created to serve as a reference for individuals interested in indicators and metrics to help communities define and track progress on their climate adaptation goals. Additional background and resources are available on the website: www.ResilienceMetrics.org.

This website was developed in partnership with the National Estuarine Research Reserve System with funding from NOAA.



➤ **Step-by-step delivery of exercise**

Step 1: Begin by getting regional partners to think about the visions they are working towards as part of their current work, facilitating a dialogue around what regional visions different organizations are committed to. Questions might include:

- What's your agency/organization's vision for the future?
- Are there specific management documents this vision is documented in?
- How does this vision align or not align with other regional agency/organization's visions for the future?
- What are the key strengths of this vision?
- What are the key weaknesses of this vision? What's missing from this vision?
- Facilitation tip: Participants may not have or know about explicit visions, so be prepared to draw out their agency's mission, any goal statements contained in guiding plans or strategy documents. If an entity truly does not have anything of the sort, ask them to participate the best they can, articulating what they think their organization's goals are.

Step 2: Then break the room into small groups, and have them develop one vision/goal for the region to work towards. Ensure the groups have diverse representation from different agencies.

- Facilitation tips: In forming groups, you may randomly mix up participants or if you know all attendees, have people assigned to different break-out groups to ensure diversity in each group. Groups might be asked to begin by each writing down aspects of their organizational visions on sticky notes (*one item per sticky*) and place them on a large butcher paper so that it is easier to organize shared or aligned or related vision elements. It may be helpful to have table facilitators to ensure implementation of the exercise in the time allotted for the exercise.

Step 3: Ask the group to reflect on areas of alignment and lack of alignment, as well as on gaps. Identify areas that are promising for collaboration and also potential sources of conflict. These should be revisited in a later step in the process to see how people can work toward shared goals, compromises or establish processes to address them.

- Facilitation tip: A table facilitator can help with this discussion.

Step 4: Have tables report out to the whole group and facilitate a discussion of alignment across tables.

Step 5: Then have the table groups return to their individual tables and think about their vision/goals for the future, and, finally, about how climate change may impact progress towards the group's vision for the future. Prompting questions may include:

- What aspects of climate change may impede progress towards your vision?
- What aspects of climate change may actually enhance or facilitate progress towards your vision?
- Does your vision/goal need to be adjusted in light of climate change?

Step 6: Report out to the whole group and discuss common themes and challenges. These are important insights to develop working groups around for later work in the adaptation process.



Example Use and Outcomes

At the Tijuana River National Estuarine Research Reserve (TRNERR), regional partners were brought together to better understand how different agencies and organizations envisioned the future, and to begin dialogue around how climate change may alter components of these regional visions. The outcome helped the Reserve to better understand how individual organizations' visions, as outlined for example in their Comprehensive Management Plan, was aligned or misaligned with other organizational visions.

This exercise helped each organization to better understand other organizations' diverse perspectives on what "success" looks like in the River Valley. The conversations laid the foundation for engaging the more than 8 public agencies that manage the land throughout the River Valley, ensuring that I&Ms identified in later steps were truly grounded in a vision that all agencies were committed to.

Before this exercise, many organizational visions were buried deep in out-of-date management plans that not many people revisited or even thought about in making daily decisions. This exercise provided participants a platform to critically think about a thriving, healthy River Valley, and recommit to their individual organizational visions after a critical analysis of its strengths and weaknesses. Additionally, participants were able to think beyond the boundaries of their individual organizations, and think about how broader inter-organizational collaboration could bring to life a regional vision resulting in broader impacts.