

Session 4: Establishing Group Norms & Planning for Action (15:15–16:30)

Objective

Synthesize Day 1 learnings by focusing on two practical outputs:

1. Developing a set of group norms/ground rules and a shared vision for a stakeholder group, and
2. Creating a basic action plan or next steps for the group.

Participants will practice formulating these with an example scenario and understand how a facilitator guides a group through these foundational steps. By the end of this session, participants will have a draft “group charter” (mission statement and norms) for an example network, and they will know how to wrap up a meeting in a way that drives action and accountability.

This session title partly overlaps with what we discussed in Session 2 regarding norms, but here we turn it into a concrete exercise and also integrate forward planning. Adjust emphasis to avoid too much repetition; focus on application now.

Crafting a Group Vision and Norms

Explain that at an early stage in a stakeholder network or innovation group, it’s very valuable to collectively define “*why we are here*” and “*how we will work together*.” A facilitator often leads a session to develop a **group vision or mission statement** and to set the **ground rules** we talked about. This establishes a common purpose and culture from the outset. Review in one slide or flipchart: A mission statement should be concise and inclusive of all stakeholders’ interests (e.g., “*Our mission is to learn together and promote agroforestry practices that benefit both farmers and the environment in X region*”). Ground rules should be brainstormed and agreed by the members (not imposed by the facilitator, though the facilitator can suggest and guide the discussion).

Move quickly into an **exercise** to practice this:

- Form new small groups of about 5 persons. Give each group a scenario of an agroforestry stakeholder network just being formed. For example: “*You are facilitating the first meeting of the ‘Local Woodland Pasture Network’, which includes 10 silvopasture farmers, 2 researchers, and a local agriculture officer. The goal is broadly to share knowledge and improve practices.*” Each group’s task is to draft a mission statement and 5 key group norms that they would propose to that network. They have approximately 15 minutes. They should role-play if they wish (some members acting as farmers/researchers voicing what they want in the mission or norms, with one acting as facilitator to moderate). Circulate among groups to assist, reminding them to think of diverse stakeholder priorities when crafting the mission (e.g., farmers might emphasize income, researchers’ knowledge, officers’ policy alignment – a good mission finds common ground). For norms, ensure they recall examples from earlier.
- After time, have each group share their proposed mission and norms. Discuss briefly: Are they clear and motivating? Do the norms cover key behaviours (respect, participation, etc.)? Encourage peer feedback. This not only reinforces the concept but also results in some example charters that they can reference. Perhaps even vote on which mission statement is most inspiring as a fun element.

Point out how the facilitator’s role in reality would be to guide the group to these outputs. In practice, you might write ideas on flipchart, facilitate consensus on wording, and then ensure everyone feels ownership of the final version. These become part of the group’s “constitution,” which the facilitator can use in future meetings to keep things on track.

Moving from Discussion to Action – Meeting Wrap-Up

The second part of this session addresses how a facilitator concludes a meeting to ensure outcomes are acted upon. It is one thing to have a good discussion: it's another to translate it into real-world impact. Advisors as facilitators should help groups create actionable next steps. Cover the basics of a strong wrap-up:

- **Summarize Key Decisions/Outcomes:** Always allocate a few minutes to recap what was accomplished. The facilitator can do this or ask someone from the group to summarize. e.g., *“Today we identified our top 3 priorities: A, B, C, and agreed to test agrisilviculture practice X on two farms.”* Summaries solidify the collective memory and ensure everyone leaves with the same understanding (prevents the *“I thought we decided X”* confusion later).
- **Assign Responsibilities:** If any actions were agreed upon, clarify **who** will do **what** and **by when**. This might involve delegating tasks or forming subgroups. For example, *“Ali and Jean will coordinate the seedling purchase by next month, the researchers will design the trial protocol, and Farmer Y will host the first field demo in September.”* Write this down on a visible medium as it is being decided. In formal groups, this goes into meeting minutes, but even in informal ones, the facilitator should note it and perhaps send a follow-up email or message summarizing actions.
- **Set the Next Meeting/Follow-up:** Do not let the momentum drop – try to schedule the next meeting date or at least establish a communication plan (maybe a WhatsApp group or email list) before closing. This is especially important for ongoing networks. If scheduling now is not possible, the facilitator should take responsibility to follow up with a scheduling poll soon after.
- **Closing Round or Reflections:** If time allows, a quick go-around for final thoughts or appreciations can end on a positive, inclusive note. For instance, ask each participant to share one thing they found valuable about the meeting. This can reinforce commitment and give the facilitator feedback. Or simply thank everyone and highlight a positive observation (*“I really appreciated how openly everyone shared today – it shows the trust building in this group.”*).
- **Evaluation:** In a training context, you might evaluate the session; in a stakeholder meeting, you might not formally evaluate every time, but occasionally asking for feedback on the process can be good (for example, a quick plus/delta: one thing they liked, one thing to improve). For the training's sake, mention that an effective facilitator is always learning and could solicit feedback from the group about the meeting's facilitation.



Activity – Action Planning Role-Play (15 min)

To practice the transition to action, pick one of the small groups that presented their mission/norms (or use a volunteer group) and have them simulate the **end of a meeting** for their scenario. One person acts as the facilitator and quickly goes through the steps: summarizing what that imaginary meeting achieved (they can make it up), assigning a couple of tasks, and closing with a thank-you or a quote. It should be brief. Then debrief with everyone: Did the “facilitator” hit the key points (summary, responsibilities, next meeting)? How did it feel to have that clarity at the end? The idea is to reinforce that participants should always aim to provide that clarity when they facilitate real groups.

At the end of Session 4, tie everything from Day 1 together: we started with the role and mindset of a facilitator, looked at guiding group process and dynamics, learned concrete techniques, and now saw how to formalize group agreements and follow-through. Day 1 has given them a strong foundation.



Wrap-Up & Day 1 Reflection Assignment (16:30):

Thank participants for their active involvement throughout the day. Encourage them to reflect on what they learned. A simple assignment for overnight could be:

“Think about a group you currently work with (or will work with soon). Jot down what stage you believe they are at (Forming, Storming, etc.), and list two facilitation techniques or approaches you want to try with them.”

They don't need to turn this assignment in; it's to prepare their mindset for Day 2.