



# From Seed to Success

## Tool Kit for Community Conservation Projects

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Department of Conservation  
*Te Papa Atawhai*



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# 1. Introduction

This Tool Kit provides a range of useful information for people involved with community conservation projects. Working together with others in the community to achieve a conservation task can be a new experience for many – exciting but at the same time daunting.

This resource is designed to support community conservation groups and projects by pulling together some of the information that can assist you to work more effectively towards your goals.

Sections 2 to 8 cover techniques and tips for:

- facilitating effective meetings;
- basic techniques to work effectively as a group;
- consultation, including with tangata whenua;
- managing conflict in a group ;
- organising meetings and events;
- group planning;
- reviewing events and group progress.

Sections 9 to 12 provide a directory of some of the resources available:

- training courses;
- references for useful publications and websites;
- funding;
- information about group structures.





## 2. Facilitating effective meetings

Effective, enjoyable meetings don't just happen by accident. They require planning and attention to meeting process. This section discusses the role of a meeting facilitator to guide meeting process and help ensure the meeting achieves the group's purpose. It also provides tips for those making presentations at meetings.

### WHAT IT MEANS TO FACILITATE

To **facilitate** is to make easy or more convenient. A **facilitator assists the group to make its work easier**. A facilitator's job is to manage the way the group works together, not to influence the outcome or results.<sup>1</sup>



"WHEN THE GOING GETS TOUGH THE FACILITATOR  
KEEPS GOING"

Source: Hunter et al. 1992

If you choose to take on the role of facilitator, make sure you:

- pay attention 100 percent of the time;
- get the job done – achieve the meeting's purpose;
- keep the discussion moving;
- ensure everyone gets a say;
- honour all responses;
- don't get involved personally in the discussion – stay neutral.

<sup>1</sup> Collins et al 1995

## Be clear about purpose

It is essential that the facilitator is clear what the purpose is for any meeting and that the whole group agrees with this purpose. For a small meeting, this might simply require clarifying the items for discussion at the beginning. For a larger meeting, it may be necessary to negotiate and agree on the purpose with the group at the outset.

## Ensure full participation

A key role of the facilitator is ensuring everyone can participate. Often agency representatives or more skilled local people may be quite vocal and articulate compared to others in the group. Power differences can also come into play – for example, the meeting and decisions may be dominated by the agency administering the land where the project is taking place.

It's important to be aware of these dynamics within a group and to enhance the opportunities for everyone to contribute equally.

## FACILITATING FROM THE FRONT<sup>2</sup>

If you are the main person guiding the group's process, the ideas below may help.

### Preparation

- Before the meeting, put the meeting purpose up somewhere clearly visible on the wall.
- If possible, organise someone to share your job – for example, to meet and greet people, make sure they have a drink. If there are any distractions during the meeting (e.g. a visitor from elsewhere), the second person can take care of them without affecting the meeting. Sharing the actual facilitation means that the group can benefit from different styles and a change of face, especially if group energy is waning. It also means you can check with each other about how it's going.

### Starting off

- Begin and end the meeting on time. Be clear at the beginning about the finishing time and breaks, and stick to them. Check that people are okay with times and be prepared to be flexible.
- Welcome everyone, go through the purpose and agenda (asking for any additions or changes), make appropriate introductions, and go over ground rules (either get people to suggest some or use the ones later in this section). Check for understanding and agreement.



See Section 5 for more on introductions.

<sup>2</sup> This section incorporates material developed by Denise Langlands.

- Check that the meeting purpose actually covers what the group wants to achieve. Sometimes people will have moved a little from their original ideas – they may want to change things slightly or even completely! Whatever happens, the whole group needs to agree before the meeting continues.

### During the meeting

- Your role includes keeping the agenda going, as well as looking out for the energy and comfort of the group. Check that people can hear and repeat any unclear questions from the floor. If energy is waning, use an icebreaker or have a break. Be alert to people's body language at the same time as you keep the meeting moving – this takes 150 percent concentration!



See Section 6 for icebreaker ideas.

- If you're on a field day, there are additional considerations for comfort and safety. If you're going into the bush with more than five people, count heads and appoint someone as 'tail-end Charlie'. When you stop to talk to the group, allow time for people to gather and, if possible, stand on higher ground so you can be seen and heard. Avoid having the sun shining in people's eyes.
- Keep trying to ensure that everyone is involved as much as they want to be. If two or three people are dominating the discussion, ask the others regularly for their input – *'what do other people think about that point?'*
- Record key discussion points and decisions accurately. Where actions are agreed, record who is responsible for getting it done.



See Section 6 for more ideas about recording.

- Keep revisiting the purpose and summarising points – this helps people who have missed points and clarifies where you are up to.

### At the end

- Check with the group that the purpose has been achieved. If not, another meeting may need to be arranged. Remember to thank everyone for their input.



See Section 5 for more ideas about thank-yous.

- You may wish to evaluate the meeting process.



See Section 8.

**Suggested ground rules for productive meetings<sup>3</sup>**

- Respect each other's right to speak without interruption.
- Be aware of how long and often we speak so that everyone has a chance to contribute.
- Make every effort to listen to each other so we understand the various perspectives.
- Speak for ourselves – *'I think ...'* or *'I feel ...'* rather than *'everyone knows ...'*
- No personal attacks or put-downs.
- Use inclusive language (not racist, sexist, ageist, etc.).
- Turn off cellphones.

**Other ideas**

- Everyone takes responsibility for keeping the meeting on track.
- One person speaks at a time – no side conversations.
- Be constructive, relevant and concise with comments.

It's a good idea to write up agreed ground rules where everyone can see them.

**FACILITATING FROM THE BACK**

Even when you're not running the meeting, you can make subtle interventions that create a more effective meeting process. Check out the ideas below.

**Making constructive suggestions**

Make constructive suggestions without disrupting the flow of the meeting:

- *'I'm not sure if we all know each other here, can we quickly introduce ourselves?'*
- *'Is it a good idea to take notes today, and if so who would like to?'*
- *'I feel that we've come up with some good points so far. How about we summarise them and see which ones we all agree with.'*
- *'I'm just aware we haven't heard from everyone yet. Could we quickly check what each of us thinks about that last suggestion?'*
- *'Just looking at our agenda, we only have half an hour left and six items still on the list. Which are the most important ones to deal with?'*

<sup>3</sup> Department of Justice 1997

## Encouraging others

- Be supportive of ideas and comments that are taking the meeting in the right direction.
- Watch that you don't dominate the conversation and that other people contribute evenly
- If you're being paid to attend and other people are there voluntarily, this can affect the dynamics. People sometimes resent this or look to you as the 'expert'. You can downplay this by using 'bounce' questions when you are asked for your opinion on something which it is not appropriate for you to answer – for example, *'That's an interesting question, has anyone here had experience in a similar situation?'*

## USING AN OUTSIDE FACILITATOR

If the meeting runs badly and your suggestions for improvement aren't working, it could be time to propose that an outside facilitator is used or that someone else in the group runs the next meeting. It's a good idea to call in an outside facilitator when:

- it's a big meeting with a long agenda and a wide range of people attending, possibly with conflicting views;
- the group is stuck and not getting through its work efficiently;
- everyone in the group wants to take part in the meeting and doesn't want the responsibility of keeping the meeting running.

Outside facilitators can be:

- someone known to the group;
- a recommended independent facilitator;
- someone within an agency with facilitation skills, who is not involved in the project.

Whoever you choose to use, make sure the whole group is okay with the process and the person – if one or two people aren't happy, they could sabotage the meeting.

## MAKING PRESENTATIONS

If you have to make a presentation at a meeting, the following ideas may help.

### Preparation

- Find out how much time you have and prepare realistically. Practise to see how long it really takes. Don't talk for more than 20 minutes as a rule and allow time for questions.
- Use examples that make sense to your audience – for example, if you're talking about water quality to farmers, talk about the amount of urea equivalent in waterways rather than the concentration of nitrogen. Check your language with a non-expert to avoid jargon.
- Consider your key take-home messages and make sure you state them clearly at the end of your talk. Try to end on a practical 'what you can do' note.
- Consider appropriate handouts or written information to reinforce your messages.

### During your presentation

- Introduce yourself and your field of expertise and experience.
- Clarify whether you will take questions as you go or have them at the end.
- Speak clearly and not too fast. Check that people at the back can hear you.
- Don't speak with your back turned to the audience and don't stand in front of your screen.

Annabel Riley at a joint  
DOC/Wellington Regional  
Council restoration day,  
Taputeranga Marae  
Photo: DOC/Nikki Wright



### Visual aids

- Always try to use visuals as well as words. For overheads, use at least 18-pt print.
- Put your ideas into bullet points and aim for no more than **five points** per overhead.
- Get there early to check equipment works and if you're using Powerpoint, bring your presentation on overheads as well.

### INTERPERSONAL COMMUNICATION

To be most effective in a group, it's important to be a good clear speaker and listener. A good communicator:

- listens with interest, attention and without interrupting;
- uses appropriate body language – eye contact and facial expressions
- uses and remembers names;
- encourages people by nodding and using other responses;
- follows up with open-ended questions – for example, *'What do you think?'* rather than *'Do you agree that...'*;
- listens for feelings and what's behind a person's words;
- checks with the speaker that they've understood their meaning by asking questions of clarification.

You can improve your communication skills by:

- doing a course on interpersonal communication;
- getting some help when you are preparing for and debriefing situations. Ask for suggestions from people that you know well and trust, about both your strengths and areas to improve on;
- making sure you honour everyone in a group and accept they have something to offer, even when this is not obvious. When you give people respect, they often behave respectfully!
- avoiding blaming language – for example, try *'Thanks for your input, it's been good to hear your points. What do other people think of this?'* rather than *'You're being a know-it-all.'*

## Expressing concerns

One of the hardest parts of interpersonal communication is expressing things that you're concerned about, when you feel it may create bad feelings or conflict.

Using 'I' statements is a constructive way to express your feelings and concerns without blaming. It may not come naturally at first but you can begin by monitoring your speech for words like '*You should...*' or '*You are...*', which will often leave people feeling defensive.

Tips for using 'I' statements include:

- Be specific – for example, '*I feel that this point has been raised a number of times without being resolved*' rather than '*I'm sick of conversations that go round in circles.*'
- Avoid generalisations like 'never' and 'always.' Try things like '*Three times in the last month I haven't heard about things coming up*' rather than '*I always get left out of the loop.*'
- Watch for false 'I' statements like '*I wish you would...*'

One way to structure your 'I' statements is to think of them as having four parts:

- The situation that affects you – '*When such and such happens...*'
- How it affects you – '*I feel...*'
- What you would prefer to happen – '*It would be better for me if...*'
- How it would improve things – '*That way, ...*'

For example, try '*When I get interrupted, I find it distracting and I would prefer if I could finish. That way, my ideas for the project could be considered*', rather than '*You always interrupt and it's very distracting*'.

When other people give you feedback, there are also some things to keep in mind:

- Choose what to keep and what to leave – you may not agree with all the feedback you get. However, if you hear the same piece of feedback from several different people, you may need to reconsider!
- Don't say anything in response unless you are asking for clarity. It can be hard not to react defensively, but it's better to let the comment sit and think about it later.
- When you are ready to respond, try using 'I' statements to express your own feelings.



### 3. Consulting with others

Many community conservation projects require a degree of consultation with others. Whether or not you're legally required to consult, the process allows people to have input into your plans and informs them about what's happening. You may also pick up more supporters as a result.

Consultation is effective when:<sup>4</sup>

- communication is two-way;
- everyone who needs to be involved is involved;
- the process and timing meet the needs of the task and those involved;
- the process allows for evaluation and has a clear completion.

#### TWO-WAY COMMUNICATION

Consultation is about listening to others' concerns, not about telling. Consulting in good faith involves:

- being honest about your plans;
- listening to what people say with an open mind and seeking to address concerns;
- maintaining ongoing communication.



For more ideas, see Section 5 of *A Guide to Community Conservation Projects*.

#### INVOLVING EVERYONE

- Be inclusive and open. Be aware though that it may be appropriate to start your consultation with key players like tangata whenua or directly affected people before having open community discussions.
- Go beyond your usual networks – get all partner organisations to help.

#### APPROPRIATE PROCESS AND TIMING

- Ensure your purpose and intentions for consulting are clear to everyone.
- Give people enough information to provide you with useful and informed feedback.
- Allow enough time for people to consider the information.
- Use techniques appropriate to those you are consulting and allow everyone to have a say.



See Section 6 for more ideas.

<sup>4</sup> Adapted from Rush 1997

Many community consultation projects require consultation with others.  
 Photo: DOC/Dave Hansford



## EVALUATION AND CLEAR COMPLETION

- Let people know when and how you came to your decisions.
- Mark the finish in some way.
- Provide an opportunity for evaluation.



See Section 6 of *A Guide to Community Conservation Projects* for more ideas.

## WORKING WITH TANGATA WHENUA<sup>5</sup>

Effective communication is easier when your own position is clear and you understand the values, beliefs and situation of tangata whenua. The following steps will help you work more effectively with tangata whenua. However, the main thing is to be honest and be prepared to listen and address concerns. Extra preparation is helpful but don't let it stop you from initiating dialogue.

### Prepare

Review the principles of good consultation. Do some research:

- Find out about local history. Make discrete enquiries with kaumātua and kuia to find out what has happened to tangata whenua in the past.
- Are there any outstanding characteristics of the tangata whenua noted and acknowledged by the Māori world at large?

<sup>5</sup> This section is adapted from work by Pat Campbell, DOC Northland Conservancy, with contributions from Sandra Hei Hei, DOC Kaitiāia Area Office.

### **Examine your own assumptions**

- What role do you assume Maori should have as guardians of resources?
- How do you feel about issues like customary use and the Treaty?
- How much are you willing to include others in decision-making about your project?

### **Examine your project proposal**

Be clear on the essence of your project, your kaupapa:

- Think about what you **need** to say, not what you **want** to say.
- Consider why you are passionate about your project and how to communicate this.

### **Identify benefits and risks**

- Determine why tangata whenua would be interested in the kaupapa and plan your consultation accordingly.
- Consider the risks your project might pose to tangata whenua – for example, restrictions on resource use and access, sense of loss of rangatiratanga.

### **Identify relevant Treaty principles**

If you are not already familiar with the Treaty, review it – Claudia Orange’s *The Treaty of Waitangi*<sup>6</sup> is probably available in your local library. Note that many words have a different sense in the Māori and English versions. The Māori version, for example, guaranteed tino rangatiratanga, full absolute power and authority over resources – sometimes translated as self-determination. The English version, on the other hand, talks about Māori ceding sovereignty, translated as ‘kāwanatanga’ (governance), an unfamiliar term to Māori. This leads to much debate over how to give effect to the Treaty.

Be aware that while there are only three articles in the Treaty, various people have also identified principles arising from the Treaty. Some include the principle of partnership, working together as equals (Ōritetanga), and the duty to inform (He here kia mōhio).

### **Plan your presentation<sup>7</sup>**

Choose your language carefully:

- Practise Māori names for places, species and tribal groupings.
- Ensure you fully understand the sense of Māori words you use. For example, the word ‘kaitiaki’ is often translated as ‘guardians’ but has a specific cultural context so you cannot automatically assume this role applies to you.

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<sup>6</sup> Orange 1987

<sup>7</sup> Campbell 2002

Make your presentation relevant:

- Include visual resources such as photos and posters where possible.
- Tell a story and use humour where appropriate.
- Focus on species and values of interest to tangata whenua – for example, those used in toi (traditional craft).
- Emphasise benefits of the project to tangata whenua and wider community.
- Identify possible issues and potential solutions.

Plan your agenda but be prepared to change it. A good structure might include:

- Introductions.
- Presentation on your project.
- Responses to the proposal from tangata whenua.
- Further discussion.
- Conclusions and agreements on how tangata whenua want to be involved.

### **Take care in your delivery**

*'Our mouths and words are a very powerful tool. Our words are the reflection of the future.'*

When you're presenting information, take care to be:

- honest and humble – believe in what you say. People can sense passion and honesty;
- aware – people will pick up on body language and know if your heart is in it.

### **Speak to your audience<sup>8</sup>**

I roto i te reo Māori (use of Māori language) is a key tool. Iwi Māori have an emotional and spiritual understanding of words – words are real in the essence (mauri) of the topic. Therefore, bilingual resources can be key tools to ensure:

- what you say is understood;
- you demonstrate respect for Māori culture.

This applies equally when speaking to another cultural group. It's also helpful to use local information to make your presentation more relevant to the audience.

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<sup>8</sup> Hei Hei 2002c

## 4. Managing conflict in a group

Conflict is both normal and inevitable where a group of people are trying to achieve something.<sup>9</sup> It may be a sign that relationships have not been developed or maintained well. The important thing is how conflict is dealt with. If it's addressed constructively, conflict can be an important step in building and maintaining relationships.<sup>10</sup>

Conflict may arise due to<sup>11</sup>:

- diversity and difference in values, opinions, culture, needs and perceptions;
- power imbalances;
- suppression of feelings and emotions.

### How conflict fits into the life cycle of a group

The following model of group stages accepts that conflict is a normal part of group development:

- **Forming** – people are usually quite tentative when groups are new – polite, interested, keen, enthusiastic, shy.
- **Storming** – people move into a more relaxed mode and become their real selves. This is the stage when conflict is most likely to occur – where people get annoyed by one another's behaviour.
- **Norming** – this is what occurs once some resolution takes place. For example, a person's consistent lateness really annoyed you, so you brought this up in the group. As a result, the meeting time has changed to 9.15am, so that person has time to drop their children off at school beforehand – problem solved!
- **Performing** – this is the ultimate stage in a group's life where things are going really well. Everyone knows each other's strengths and weaknesses, and gets the job done as a team.

Conflict can happen at any time in a group but is most likely to cause real problems in the 'storming' stage.<sup>12</sup>

<sup>9</sup> This section incorporates material developed by Denise Langlands

<sup>10</sup> Weeks 1994

<sup>11</sup> Weeks 1994

<sup>12</sup> Tuckman 1965

If addressed constructively, conflict can be an important step in building and maintaining relationships

*Photo: DOC/Dave Hansford.*



Pointers for dealing with conflict include:

- don't panic when conflict arises – see it as an opportunity for growth;
- recognise that people and cultures see and handle conflict in different ways ;
- try to look at things from each person's point of view – take their feelings seriously;
- try to separate people and personalities from the situation – consider issues only;
- make time to talk about it;
- be clear in your own mind what your goal is but be open to changing it or finding alternative ways of achieving it;
- focus on mutual interest;
- emphasise common concerns and points of agreement;
- look for options where there are mutual gains.

## GENERAL STRATEGIES FOR MANAGING CONFLICT

As a group member or facilitator, it's useful to have some strategies to guide the group through conflict:

- People often talk about what's annoying them outside of the group, rather than at meetings. Providing a time for people to speak when the group is together can be helpful. Try introducing this as 'time to discuss how we are going.'
- When people are in conflict and not dealing with it, the energy of the group will often be sluggish. Check out what's happening if you sense an energy loss.
- Set some ground rules – things like 'no put-downs' or 'using I statements.'
- Revisit the group's purpose. Have people temporarily forgotten what they are there for or are people working towards different goals?
- If the conflict has become too big, it's sometimes best to stop the meeting. Conflict might be better dealt with just between the people concerned or using an outside facilitator.
- People often bring things up that are irrelevant to the purpose but still important to them. Use a 'parking lot' piece of paper for these issues - this lets people know they aren't forgotten. The issues can then be dealt with either after the meeting or at the end. If the issue is big enough, consider calling another meeting to deal with it.

## USING ROUNDS TO RESOLVE GROUP CONFLICT<sup>13</sup>

Materials: Whiteboard or flipchart.

Time: 1–2 hours.

Process: The process uses 'structured rounds' where everyone in the group is given a set amount of time to comment on the issue in question. No one can interrupt or comment on what that person has said while they are speaking.

During the first round, the facilitator encourages people to state their feelings and what they see as the issue. During the second, and possibly third or fourth round, the facilitator encourages people to identify solutions to the issue. Both the issues and suggested solutions are written up where all can see. Once the alternatives have been listed, have a round where people state their solution preferences.

It's useful to start each round with a different person. If people don't want to speak, they can 'pass.'

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<sup>13</sup> Hunter et al, 1992

## DEALING WITH HOSTILITY DIRECTED AT YOU

Particular skills are needed to deal with situations where people are reacting in a hostile or angry way towards you. This can be difficult in a meeting situation where protracted arguments can prevent the group achieving its purpose. It can help to consider why people might be hostile and to have some techniques for working through the situation, while acknowledging their anger.

Reasons why people might be hostile towards you could include:

- they are annoyed with something you have done;
- they are annoyed with something someone else has done;
- they feel they've been ignored;
- there have been historical injustices;
- they may see you as the leader and may have had problems with authority figures in the past (teachers, police, welfare staff, government officers);
- they are having a bad day or have things going on at home;
- they are hostility junkies (people who look for conflict wherever they go).

Strategies for dealing with hostility include:

- Acknowledge people's anger and give them time to explain why they're angry. Often trying to shut people down or offer explanations or solutions too early is counter-productive. Reflect back what they are saying so they know you have heard and understood. For example, try *'So you're really annoyed that you weren't informed about this project earlier?'* rather than *'We had a problem with our database and some people got left off the mailing list.'*
- Respond using 'I' statements (see Section 2 ).
- Ask others if they are also concerned about the issue.
- If the person still needs to talk and time is limited, suggest taking the conversation somewhere else – for example, *'I can see you're concerned about this. Is this the right place to talk about it or would you prefer to meet when we have more time?'*
- If the person's behaviour is disruptive to the meeting, check with the group what they would like to do.



## 5. Organising meetings and events

There are a lot of little things to remember when you're organising a major meeting or event.<sup>14</sup> They typically fall under the following headings:

- feasibility check and initial planning;
- who to invite and how;
- setting a date and time;
- organising equipment and materials;
- refreshments;
- presenters, chairperson and/or facilitators;
- agenda and process;
- acknowledgements.

Use the information below and the checklist at the end of this section to help with the task.

### FEASIBILITY CHECK AND INITIAL PLANNING<sup>15</sup>

Before you even start to organise your meeting or event, it's worthwhile checking that this is actually what you need to do and that it's realistic for your budget etc. It's also important to identify who can help you – ideally you'll have a team of people with different strengths, e.g. publicity, artwork and displays, catering, iwi liaison. If you're the sole organiser, use experienced people to check your initial ideas and make sure you're on the right track.

Together with your organising team, discuss the following questions:

- What are our goals?
- Is an event/meeting the best option for what we want to achieve and for our audience?
- Is there sufficient time to organise and publicise it adequately?
- What resources can we muster for this event or meeting? Who else can help?
- What do we want those coming to know/do/experience?
- Will people attend? What 'market research' have we done for this event/meeting? Is it something that people have been calling for, or an idea someone came up with? If the latter, it may pay to ring around a few people you would expect to attend and check on their interest.
- Are there any possible legal aspects, such as OSH considerations?

<sup>14</sup> This section incorporates material developed by Denise Langlands and by Jan Simmons.

<sup>15</sup> Adapted from Simmons, J. 2002.

Write up an action plan with allocated tasks and organise one person to check periodically that things are on schedule.

For a big meeting or event, you may need to draw up an indicative budget. Even for a smaller event, it's important to check you have enough money for venue hire or the equipment for catering (for example, a barbecue and gas bottle). On the income side of the budget, consider whether:

- costs can be shared amongst different groups and agencies;
- sponsorship is a possibility;
- it's practicable to charge participants.

Think about whether any of the following expenses will apply:

- venue hire;
- equipment hire (see list provided in the checklist);
- speakers' fees/travel/accommodation;
- entertainment;
- gifts/Koha – if you are being hosted on a marae, the koha should reflect the costs of normal venue hire as well as food if this is provided;
- food and drinks;
- artwork/displays/decoration;
- childcare;
- mail-out of invitations;
- advertising;
- transport (e.g. providing a bus etc.);
- stationery and photocopying;
- cleaning.

## WHO TO INVITE AND HOW<sup>16</sup>

For a 'start-up' meeting or public meeting, invite everyone who has shown an interest and publicise it widely so everyone has a chance to get involved. Use a range of publicity options, such as school newsletters, posters on notice boards and shop windows, free papers, local radio. Send a copy of the programme and a press release to the local papers. When advertising, keep in mind the objective and target audience – let the audience know what they will get out of attending.

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<sup>16</sup> Adapted from DOC 2001a

## ORGANISING A VENUE

Check out the venue in person or get someone you trust to do it. Consider:

- size – enough room for everyone together, plus space for break-out groups;
- suitability of furniture and facilities – number of chairs and tables, comfort, equipment availability, location of power points, parking, access for disabled;
- location – travel times, transport to venue. Is it near your project? Easy to find?
- lighting/blackout for slides and overheads, heating and fresh air;
- acoustics and background noise levels from the street or other meeting rooms;
- space for childcare or children’s activities if a family-oriented event;
- access to refreshment facilities and toilets;
- space for displays and other information;
- OSH hazards – undertake a site inspection prior to the event;
- accommodation if required – at a standard and price that suits the audience
- a back-up venue, especially if meeting is on a marae, as a tangi will take precedence;

Additional considerations for an outdoor event or field day:

- can you demonstrate everything you want to at the site?
- will you need transport at the site? If you’re organising a bus, look out for bridge limits, tight corners and turning spaces;
- traffic management, especially where access is off a State Highway;
- shade and shelter for participants;
- public address system;
- contingency plans for wet weather.

## SETTING A DATE AND TIME

For a meeting or small event, try to give people two weeks’ advance notice. For more significant events, such as an all-day field trip, you may want to give a month’s notice and request an RSVP. Follow this up 3–5 days before the event with a phone around or further general publicity. Consider organising a ‘telephone tree’<sup>17</sup> to share the load or focus on people you think are critical to the success of your project. Sending out personally addressed invitations works well. Make sure you include a map if directions are required and list clothing needs for field trips.

Hold the meeting or event at a convenient time for everyone. Consider school hours, and the time of the year (avoid lambing, calving, planting or harvest if working with farmers!) Avoid clashes with other events or major projects.

<sup>17</sup> A ‘telephone tree’ is where one person calls two others, those two call two others, and so on down the line – so one person isn’t left making all the calls.

Consider how long you need to achieve your purpose and how far people might have to travel. If a half-day is suitable, invite people to bring lunch and start afterwards, or hold the event in the morning and finish with lunch. If your audience includes dairy farmers, consider milking and travel times, and start evening events early.

## ORGANISING EQUIPMENT AND MATERIALS

- Identify handouts for photocopying, such as copies of slides or speaker's notes.
- Identify any background information you want to display.
- Prepare a clipboard and contact sheet for registration.

Identify the equipment that you, the facilitator, presenter(s) and caterers may need (refer to the checklist at the end of this section). Make up a kit/bag to take to meetings and events with any materials you might need (see the Checklist at the end of this Section for ideas).

Get to the venue at least one hour before the event starts. Put out signs to direct people. For a meeting:

- Arrange chairs in a semi-circle or circle where practical.
- Organise refreshments so that they're ready when you need them – turn on the Zip when you arrive.
- Clear away any unnecessary rubbish, posters, chairs or tables but remember where things were so you can leave the room as you found it.
- Arrange paper, pens, sticky notes, whiteboards, and overhead projectors so they're in easy reach. Try out equipment to ensure it works and you know how to work it. Set out materials for small groups to record ideas.

For a field day:

- Test your public address system – get someone at the back to check for volume and distortion.
- Park the first few cars in the parking area so people will follow suit.
- Ensure electric fences are turned off and stock are moved away.
- Check for any new OSH hazards, e.g. poison recently laid.

## REFRESHMENTS

A meeting or event is usually only as good as its food – in fact you'll often use this as a draw card to get people there, so make it the best you can!

- Consider dietary needs (such as vegetarians) and have a range of teas, coffee and water.
- Organise equipment to keep and serve food - warmers/fridges/chilly bins, paper plates, tea towels, cutlery or finger food. Consider reusable plastic cups - avoid polystyrene.
- Where possible, organise a cup of tea and something to eat on arrival, especially if people have driven some distance. If you're having a powhiri, refreshments can be served after this and generally in a separate area from the 'working' space.
- Offer the catering to a local group (such as a kindergarten or kōhanga reo) to give them a fundraising opportunity.

## PRESENTERS, CHAIRPERSON AND/OR FACILITATORS

Consider who should facilitate or chair the meeting or event – ideally someone with local respect, an understanding of the issue and experience in facilitation. A guest speaker could also be a good idea – for example, a scientist or expert working on the issue; a kaumatua familiar with the history of the site; or a community leader with a passion for the issue or the area. If a formal presentation is planned, organise a practice run and offer feedback on length, language, etc.

Make sure you brief everyone with a formal meeting or event role. It's important for them to understand the time they have available, the purpose of the meeting/event, how their role/presentation fits with this, and to be aware of any technical matters such as how to work equipment, location of lighting, etc. It's also important that people understand the role of the facilitator.

## AGENDA AND PROCESS

Working out how your meeting or event will run is a critical step in your preparation.

### **Purpose and results**

When planning your meeting or event, be clear what you want to achieve by the end of it. This will help identify your key messages, meeting or event purpose and key topics for the agenda.

### **Designing the experience**

As well as the outcomes or issues you want to resolve, consider what type of experience you want people to have. Are you aiming for fun, joint decision-making, cultural exchange, sharing knowledge on a topic, debate, learning skills, or a celebration of people's contributions and achievements? Consider appropriate ritual or ceremony, such as a blessing, song or performance, plaques or certificates. Use an element of humour or entertainment where appropriate.

### **Allowing for introductions**

Welcomes and introductions are important to help people to get oriented and feel at ease. Sometimes it will be appropriate to begin your meeting or event with a powhiri, karakia or other ritual – take guidance from someone familiar with the cultural setting and people you will be working with.

For meetings, workshops and seminars, introduce the organisers, speakers, the facilitator or chairperson at the beginning. Where time allows, ask all participants to introduce themselves, especially where people will work together later on (for example, at a workshop). Consider using a round for introductions or an 'icebreaker'.



See Section 6.

Remember to invite people to leave their name, address, and phone number (send around an attendance list) and to ask for the names of those who couldn't come but want to be kept in contact.

For public events, consider having:

- people at the entrance to welcome visitors, hand out an information package, or gather registrations;
- a notice board with 'Welcome' and critical information posted underneath, such as the schedule, location of displays, toilets, refreshments, etc.

For hui, consider:

- a powhiri – you will need to liaise with tangata whenua and organise a koha for presentation at the powhiri if you are the visitors. For further guidance about powhiri, talk to local kaumatua and refer to books such as *Te Marae* by Hiwi and Pat Tauroa.<sup>18</sup>
- mihi – inviting each person to stand and introduce themselves, saying who they are and where they are from. This allows for whakawhanaungatanga – identifying interconnections and relationships.

### Creating an inclusive process

Everyone should be able to contribute constructively to the discussion and activities. This means a minimum of ‘talking at’ and a maximum of ‘talking with’ participants:

- Use inclusive activities or methods to run the meeting or event .
- Encourage participation when facilitating.
- Provide time for feedback at critical points in the meeting or event and at the end.

If your hui is on a marae, it may be run according to local kawa and protocol, rather than a facilitated workshop format. Face-to-face discussion is likely to be emphasised with a full and frank sharing of opinions.

### Tempo and timing

To keep energy levels high, think about the order and length of activities:

- Allow sufficient time for breaks and social time/networking, particularly for long meetings.
- Don't try to do too much or fit in too many speakers.
- Plan something active or interesting after lunch.
- Have a mix of full group sessions and small group discussion.
- Provide a range of activities for different learning styles – some visual, aural, and movement-based activities.
- For meetings, consider how long people are sitting down – the average concentration span is about 20 minutes for any one topic. Don't sit for more than an hour at a time.
- For field days, consider how long people will be able to stand in one place and how long it will take to move between sites.

### Planning your evaluation

Consider how you will evaluate your meeting or event when you're designing it. Be specific about exactly what you want to review or evaluate as this will help you decide the best way to go about it.



Check out Section 6 of *A Guide to Community Conservation Projects* for how to design your evaluation and Section 8 of this Toolkit for specific techniques.

<sup>18</sup> Tauroa and Tauroa 1986

## ACKNOWLEDGEMENTS

- Acknowledge all contributions on the day with public and personal thanks, including participants as well as the people who made it possible, such as caterers.
- Send thank-you notes to speakers, hosts, helpers, sponsors etc.
- Koha can also be given to contributors, especially if they are unpaid.
- Petrol vouchers can be helpful for those who travel a long way.
- Consider a gift for participants, such as a native tree.
- If the venue is a marae, organise a koha to be presented at the powhiri and thank the hosts at the end of the hui, including the 'ringa werā' (kitchen hands).

## WHERE AN AGENCY IS ORGANISING THE MEETING OR EVENT

Make sure agency staff don't outnumber locals at the meeting/event and keep paper to a minimum – both can be intimidating to those looking to get involved. Structure the meeting or event so your agency is a **part** of the group rather than always in charge. Invite feedback on your ideas or alternative options.

Consider what the local people are getting out of attending, not just your own needs. Think partnership!



## 6. Basic group techniques

This section provides some simple ideas to help groups work more effectively.

### ICEBREAKERS

Icebreakers are activities that can be used at the start of a meeting or workshop to help people get to know others, to feel at ease, and start to build a sense of trust in a group. Simple icebreaker techniques include asking people to:

- find five people they haven't met before and introduce themselves – *'Hi, I'm ... and my favourite colour/game/pastime/previous job is...'*
- share with the group one thing they may not already know about you;
- tell everyone something they want to gain from the meeting or event and something they bring (such as experience or skills).

### RECORDING

Careful recording of the discussion and meeting outcomes is important. To ensure your records are fair and accurate:

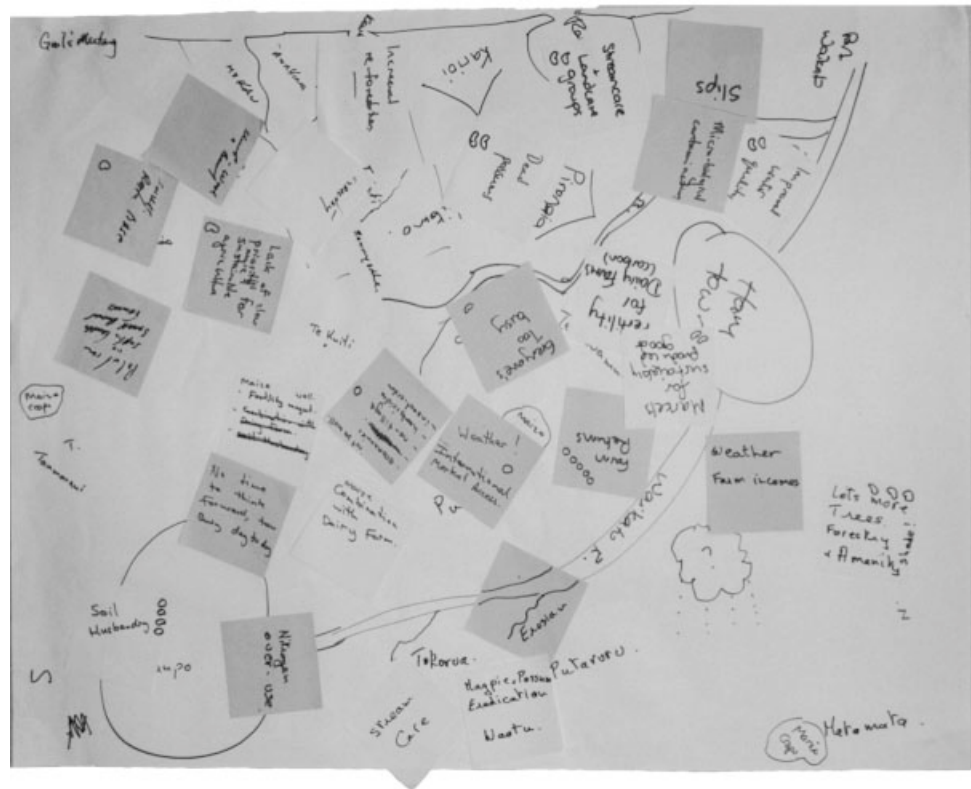
- Record points up the front where everyone can see – on a whiteboard or flipchart.
- Use the words the person suggesting the ideas has used. If you need to paraphrase or summarise, ask the person *'how could we say that in a sentence?'* or have a go and **check** with that person that you've got it right. When the note-taker is different to the facilitator, get the facilitator to check accuracy with the group.
- Sort data as you go – if one point relates to another up on the board, put them together or use a symbol to show they're related.
- Don't assume lists are the best way of setting out the data – a mind map (or spider map) may be more effective for the issue at hand.
- Use **large** clear letters in thick pen so everyone can see. Encourage those who can't see to come closer to the front.
- **Read** through, or allow participants to read through the notes, to make sure all the points have been accurately covered.
- Put up completed paper alongside the board you're working on, so people can see what's been covered. If you're using a printing whiteboard, circulate printed copies.
- Circulate minutes afterwards, emphasising action points in bold.

## USING AND CREATING MAPS

Maps are a great visual tool for sharing information and history, creating visions, and making plans. They always generate interest and people often ask for copies to take home. Maps can be topographical and to-scale or you can use aerial photos. Historical photos are helpful to show changes over time.

You can also get participants to draw maps (either individually or in small groups) to show their representations of where they live or where the project is. Having large paper and coloured pens on hand helps people be creative.

After drawing or displaying a map, you can use sticky notes for people to write comments about things they like, dislike or want to improve about this site – use different colours for each question. This helps everyone to make a comment and can generate large amounts of information quickly.



Source: Annie Perkins

## ON-SITE DISCUSSIONS/FIELD VISITS

Field days are a practical way for a group to share ideas, experience or demonstrate practical conservation skills or techniques, show the achievements of a project and/or increase public awareness of the issue. On-site visits or hikoi (walking a site together) can help people share their knowledge and perspectives and also foster personal relationships.



See Section 5 for tips on running field days.

## SMALL GROUP DISCUSSION

Small group discussion is invaluable for allowing more participation at a large event. Break people into groups to discuss particular points, generate ideas, or to try to come to an agreed position. Each group can record its points on large paper, then report back to the larger group or put its paper on the wall. It's helpful to have clear written instructions, either given to each group or on a whiteboard at the front, and to set clear timeframes. It can also be a good idea for each small group to appoint a facilitator, a recorder and a timekeeper.

## BRAINSTORMING

A group brainstorm is ideal for generating a range of creative ideas quickly. The idea is for people to put forward ideas without others interrupting or challenging. You can then follow up with some sort of analysis, refinement of ideas and selection of priorities.

A basic brainstorm uses the following steps:

1. Put a large sheet of paper in full view of all participants.
2. Remind everyone that the goal of the brainstorm is to be creative, that way-out ideas are allowed and not to edit or censor anyone else's ideas although they can build on them.
3. Write up the question being brainstormed on the top of the page or in the middle in large letters. For a bigger group, you may need two sheets of paper and two scribes.
4. Ask people to call out their ideas for you to write up, either in a list or randomly on the page.
5. Keep going until the ideas run out. If people seem shy about calling out their ideas, remind them that anything goes.
6. At the end, check if there are any ideas needing clarification.

If you find that not everyone is contributing during a brainstorm, you may need to use a round or a workshop with sticky notes to achieve more even participation (see below).

## ROUNDS

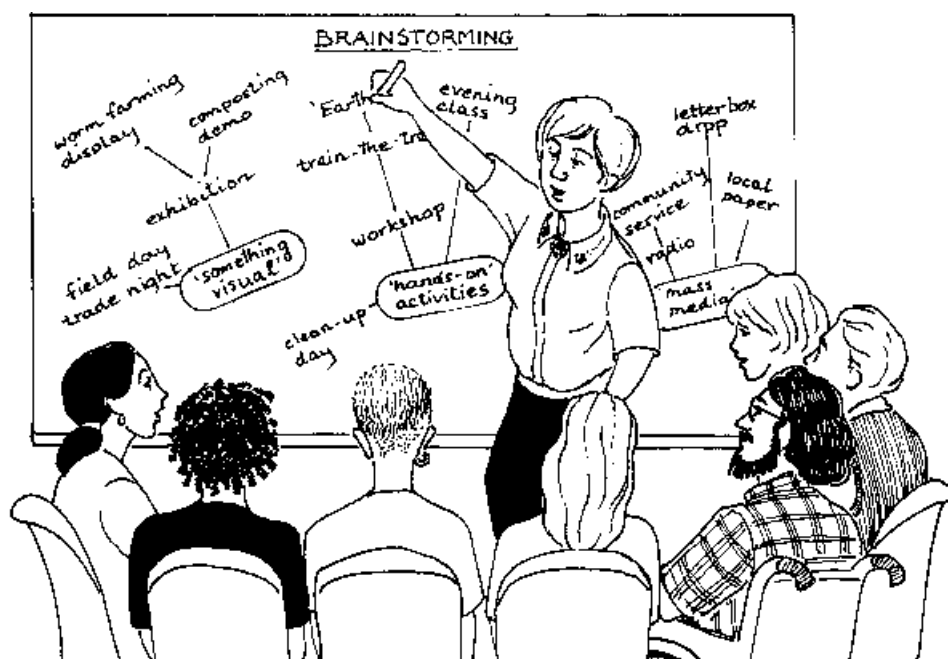
A round is a useful technique for equal participation, although it can become drawn out with large numbers of people. Basically, each person in turn gets to make a comment or give an opinion, though they may choose to pass. Nobody is allowed to interrupt.

Rounds are a good tool to start participation and as an icebreaker for people to introduce themselves. They are also a good way to test for agreement, especially when you think there may be a false consensus (people assuming everyone agrees but not checking).

## MIND MAPPING<sup>19</sup>

Mind mapping is a technique for recording that involves using pictures, key words and symbols organised like a tree diagram. The technique takes a little practice, but it has the potential to be a lot quicker and more effective than notes taken in the traditional linear fashion. The rules for mind mapping are:

1. Define your subject.
2. Write or draw a symbol for it in the middle of the paper (laid lengthways or landscape). Draw lines from the starting point and write one word on each.
3. Add new words to the existing branches by drawing out 'twigs' after the subheading. By choosing the right word, and using only a limited number, you will be able to remember more. Each word should contain a lot of the associations and facts you need when you talk about the subject (try and choose nouns wherever possible).



Source: New South Wales EPA, 1997

<sup>19</sup> Adapted from Svantesson, 1989

## WORKSHOPPING WITH 'STICKY NOTES'<sup>20</sup>

Materials: Blu-tack, scrap paper (A5 size) or large sticky notes, marker pens, large board or wall to stick ideas on.

This technique is a powerful way to get everyone's input to things like a vision, goal, plan, decision or group agreement. It has three stages – generation, grouping and naming. To introduce the process, confirm the topic or question with people – for example, '*We need to generate ideas on what we could do to deal with ...*'

### ***Generate ideas***

Get people to work individually or in pairs to write down their ideas on the A5 paper or sticky notes – one idea for each piece of paper. Hand out enough paper for people to record as many ideas as they want.

Ask people to use a felt pen and write in **large clear** letters so everyone can see it when it goes on the wall. Stick ideas up on the front wall or board. As each idea goes up, allow questions to clarify but no further discussion.

### ***Group similar ideas***

The next step is grouping similar ideas – this can be done by the group or by people telling the facilitator where to group ideas. Before moving an idea, check that its author agrees. If not, ask them to explain what was behind that idea and whether they can see it linking to anything else. Keep going until all the natural groups have been formed, but don't force any outliers – leave them separate.

### ***Name the groups of ideas***

Taking each group of ideas in turn, ask a question that gets people to analyse **all** the ideas and decide what the overall idea (or underlying theme) is – for example, '*What concept best represents all of these ideas?*' Get suggestions for a word or phrase that captures this and make sure everyone agrees.

### ***Taking the next steps***

At this point you're ready to use what you have come up with for the next stage in your workshop process. Ideally you will build in some reflection at this point – the facilitator can lead a brief discussion to recap on what was done, how participants felt (any high or low points), what was achieved, and where to from here.

<sup>20</sup> This technique is adapted from the Technology of Participation brainstorm technique developed by the Institute of Cultural Affairs (ICA) – see Spencer 1989.

## PRIORITISING AND REACHING AGREEMENT

Getting agreement in a group can sometimes be easy but more often than not, it takes considerable discussion. In some situations, a group may agree to disagree for a period, before taking up the matter again at a later date.



See Section 4 for ideas about managing conflict.

### ***Decisions by majority or consensus***

In conventional meetings, voting is used to reach decisions. This approach should be used with care as it creates a win/lose dynamic where the 'majority rules' – those who didn't support the decision may feel excluded and lack commitment to the outcome.

Consensus decision-making can be a useful alternative, where options are canvassed until one is found that either everyone supports, or those who don't support agree that they can live with. Consensus is more inclusive but can take time.

### ***Voting techniques***

Voting can be used to get an indication of people's feelings, and is particularly useful when there are a large number of ideas to prioritise (see techniques below). However, voting should be treated as a step towards decision-making, rather than the final decision in itself. Voting can be followed with a reflective discussion, to consider:

- how people feel whose priorities are not among the most popular;
- whether popular options can be modified to take other ideas into account;
- whether some of the lower ranked ideas can still be pursued (e.g. by a sub-group).

At its simplest, voting involves '*everyone in favour say aye*' or a show of hands but this doesn't give people much time to think. Other methods include:

- Draw up a list of ideas (using a round, brainstorm or workshop with sticky notes) and place it on a wall or table.
- People put a tick beside the idea they most favour; or
- everyone is allowed three ticks to place wherever they wish (all on one idea, or spread around); or
- everyone is given a set number of tokens (e.g. sticky dots or beans) to distribute on their favoured options. This creates a visual effect and ensures each vote is represented by the same symbol.
- Votes are tallied and a discussion takes place on what to do next.

***Listening for agreement***<sup>21</sup>

Purpose: To use the power of listening to hear agreement.

The facilitator encourages the group to listen for agreement, and does the same during a series of rounds or free flowing discussion.

Eventually, there will be moments when agreement happens – when everyone aligns on a solution. Often there will be a noticeable shift – people relax slightly or everyone suddenly nods and says *'that's it'*. This is the time for the facilitator (or group member) to intervene – *'I think we have agreement. Let's check it out.'* If true agreement has been reached, record it. If not, continue the round or discussion.

Sometimes partial agreement can be captured. Record this, and then continue – sometimes a series of partial agreements can lead to a final group decision.

***Using break-out groups to reach agreement***<sup>22</sup>

This basic technique uses small groups to maximise debate and participation, while allowing the larger group to move forwards. It is suitable for groups in conflict or needing to redefine their role or direction. Follow the steps below:

1. Clarify the required decision with the group.
2. Form small groups to explore options and discuss their merits.
3. After a set period of time, get each group to report back. Collate the options in the wider group, then put participants back into the same small groups to try to agree on their preferred option.
4. Reconvene the large group, so the facilitator can draw out areas of agreement on certain points and record them.
5. If there is still no clear agreement within and between groups, get people to break into small groups again and repeat the process.
6. Each time people are brought back together, the aim is to progress forward, note points of agreement, and narrow down the focus for the next small group discussion.

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<sup>21</sup> Hunter et al 1992

<sup>22</sup> This tool is based on a process used by Nicki Green.

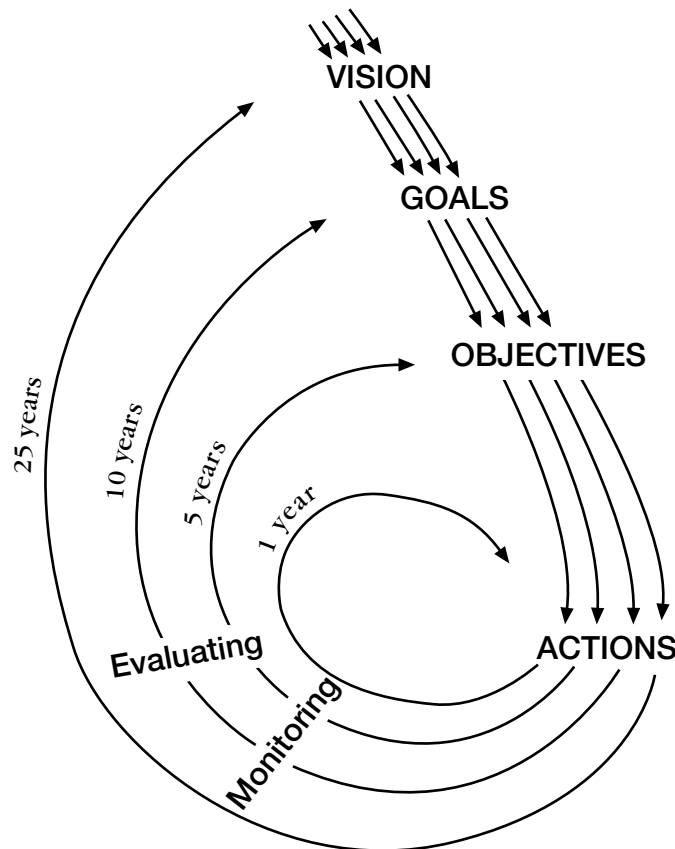




# 7. Group planning

## THE PLANNING PROCESS

Group planning typically involves one or more of the following stages: vision, goals, objectives and actions. ‘Strategic’ planning usually involves all of these stages, with each building on the other, and a review stage built in. Techniques for setting visions, goals and actions are described below, along with some strategic thinking exercises. A group review (evaluation) process is included in Section 8.



Source: Australian Local Government Association website: [www.alga.com.au/remain.htm](http://www.alga.com.au/remain.htm)

## GENERATING A SHARED VISION

Generating a shared vision is about looking at what you want in the future – your ‘ideal’. It’s useful to describe what things are like in the future, in words, pictures or both. The key to a shared vision is to find something general enough that people can agree to it, without losing the essence of what you want to achieve.

An example of a vision is:

‘Pipi Bay is full of sea life and a safe and fun place for people to be, with some areas protected and other areas providing abundant kaimoana to be sustainably harvested.’

For a small group to generate a vision, holding a discussion, perhaps starting with a round, may be sufficient to identify the common ground. Introduce your discussion with a question like: *‘What do we want things to be like in the future?’*

For larger groups, one of the tools listed below may be useful.

### **Guided visualisation**

Participants are asked to close their eyes and imagine themselves somewhere different in place or time. They’re asked to observe the sights, sounds and smells they encounter. A simple guided visualisation for Pipi Bay might be:

*‘It is now 2015. You are at Pipi Beach on a summer’s day with your family, and you’ve been skin-diving. Describe what the beach and the underwater area are like.’*

Participants then share their observations with another person before generating a list as a group and looking for the common themes from which a vision statement can be drafted.

### **Picturing your vision<sup>23</sup>**

Participants draw pictures to represent their ideal futures, which are then used to develop the group’s vision:

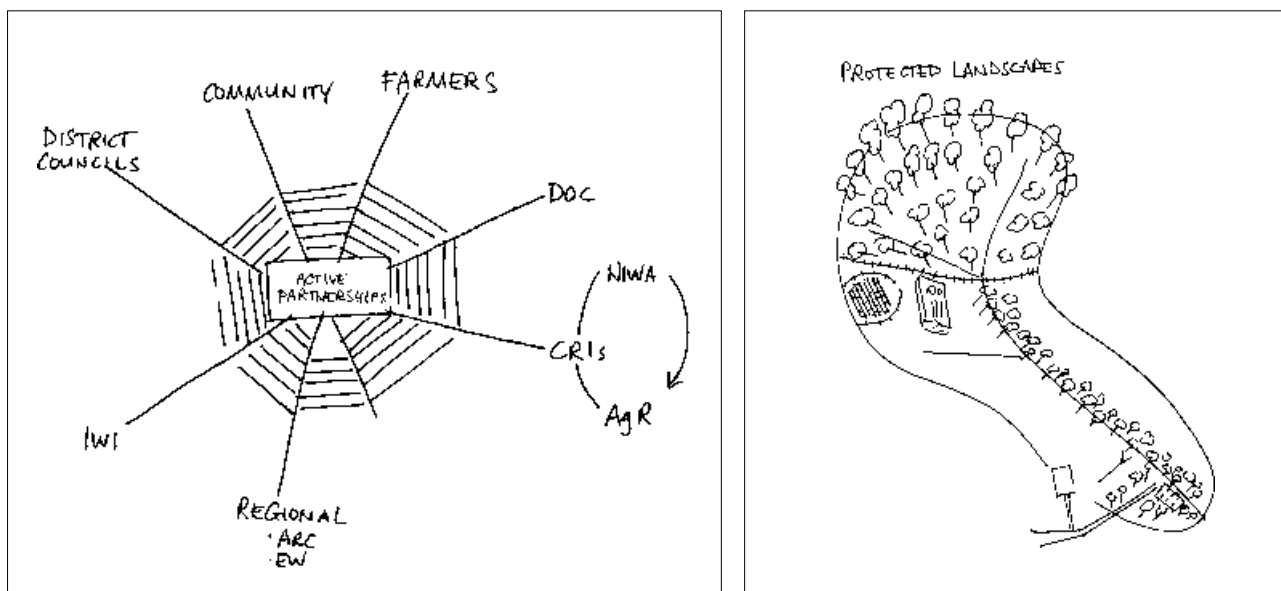
1. The first step is to build visionary pictures of what things should be like in five or more years. Each person draws a picture about the site or project or one of its components – for example:
  - landscape pictures – a map or view of the site. For example, a picture of all the physical features of the place such as bush, birds, tracks, etc.
  - symbolic pictures – showing the intangible elements of the system. For example, a picture of a web to symbolise the inter-relationships in the community or the contribution made by different participants.
2. People choose the three most important elements from their picture and write each on a sticky, which are then clumped and sorted using a workshopping method.



See Section 6 for more on workshopping.

3. Develop a vision statement based on these ideas as a group. Alternatively, a small group can produce a new visual representation capturing the common elements and bring this back to the group for additions or amendments.

<sup>23</sup> This tool is adapted from one used by Terry Parminter, AgResearch.



Source: Terry Parminter  
(Ag Research)

### Values exercise<sup>24</sup>

This can be a useful exercise to do immediately before a visioning session, or where the group is not immediately able to identify common ground. It helps people identify with one another, because some values are common, and to understand why others see things differently. The group can then spot the connections to their project and identify individual motivations they might draw on or have to plan for. This exercise works best with groups of 6 to 20 people who are comfortable with group discussion.

Time: 1 hour.

Materials: A large sheet of paper and marker pens, or whiteboard and whiteboard pens, a sheet with a list of values and some blank spaces (one copy for each person) – see the example values activity sheet provided on the next page.

1. Introduce the exercise as a way of building understanding and finding common ground. Let people know they won't be judged on their values, and won't have to share them.
2. Hand each person a values sheet and ask them to mark the seven values of most importance to them with an X. If they don't identify with these values, they can write their own in the blanks. Then ask them to rank the top three in order of importance.
3. Over a break, get people to mark their top three values on a large sheet with all the values listed on it. This should be done in a space where people can go up one at a time in privacy. When everyone has finished, tally them up quietly before the break finishes.

<sup>24</sup> This tool is adapted from one developed by Stephen Platt.

### Values activity sheet

<i>Cooperating with others</i>	<i>Gaining new knowledge</i>	<i>Having control over my business</i>
<i>Retaining/restoring native bush and birds</i>	<i>Having low work stress</i>	<i>Pursuing excellence</i>
<i>Being active in community groups</i>		<i>Close relationships with family</i>
	<i>Providing for my children</i>	<i>Respecting nature</i>
<i>Being respected by associates</i>	<i>Enjoying the landscape</i>	<i>Being wealthy</i>
<i>Being a leader</i>	<i>Experimenting with new ideas</i>	<i>Helping others</i>
<i>Having a satisfying lifestyle</i>	<i>Taking initiative</i>	
<i>Being flexible</i>	<i>Managing things efficiently</i>	<i>Being healthy</i>
<i>Keeping up with the latest trends</i>	<i>Working as a team</i>	<i>Getting ahead</i>
<i>Having wild places</i>	<i>Having financial security</i>	<i>Making my own decisions</i>
<i>Being proud of my community</i>	<i>Outdoor recreation in natural settings</i>	<i>Having social interaction</i>

4. Discuss as a group which values were most frequently ranked highly. Consider how each of these values relates to your group, your project or your site. Try questions like: *'Can anyone see how family relationships relates to managing natural areas on farms?'* or *'How can protecting our coast relate to cooperation?'*
5. Discuss the implications for your vision, goals and actions, what you will have to consider or modify to take into account people's values, and what values your project can draw upon. Ask people to come up with their own vision, using questions like: *'So if these are the things we want, what would our project have to look like?'* Check your existing plans – *'Does our current vision reflect the values we ranked highly?'*

## GENERATING GOALS AND OBJECTIVES

Goals and objectives look at the specific things that need to be achieved to reach your vision. Goals and objectives should be specific, measurable, and have a timeframe.

A goal for Pipi Bay might be:

- 'The north end of Pipi Bay is established as a marine park by 2006.'

A related objective might be:

- To file a marine park application by June 2004.'

### Simple workshop process



See Section 6 for more about workshop processes.

A simple technique to generate goals and objectives is to workshop with sticky notes based on your vision statement. Ensure your vision statement is written up in clear view and ask the question *'What would we need to achieve in order to realise our vision?'*

After getting ideas, clumping and naming them, you can develop goal statements. One person could take these away to refine and bring back to the next meeting for further discussion. Sometimes it's helpful to spend time looking at *'What's in the way of us achieving the vision?'* before you generate goals or objectives – this can help clarify the critical areas for action.

### Headlining

In small groups, people work back from the vision statement and devise hypothetical 'headlines' showing milestones reached on the way to achieving this ideal future. For example:

- 'Research shows successful reseeded of cockles at Pipi Beach'
- 'New accessways built to protect dunes'
- 'Pipi Bay fisheries to be managed under Taiapure'

This is a fun way to generate ideas for goals and objectives, which can be developed as a whole group or refined by a sub-committee.

## Concept pyramid<sup>25</sup>

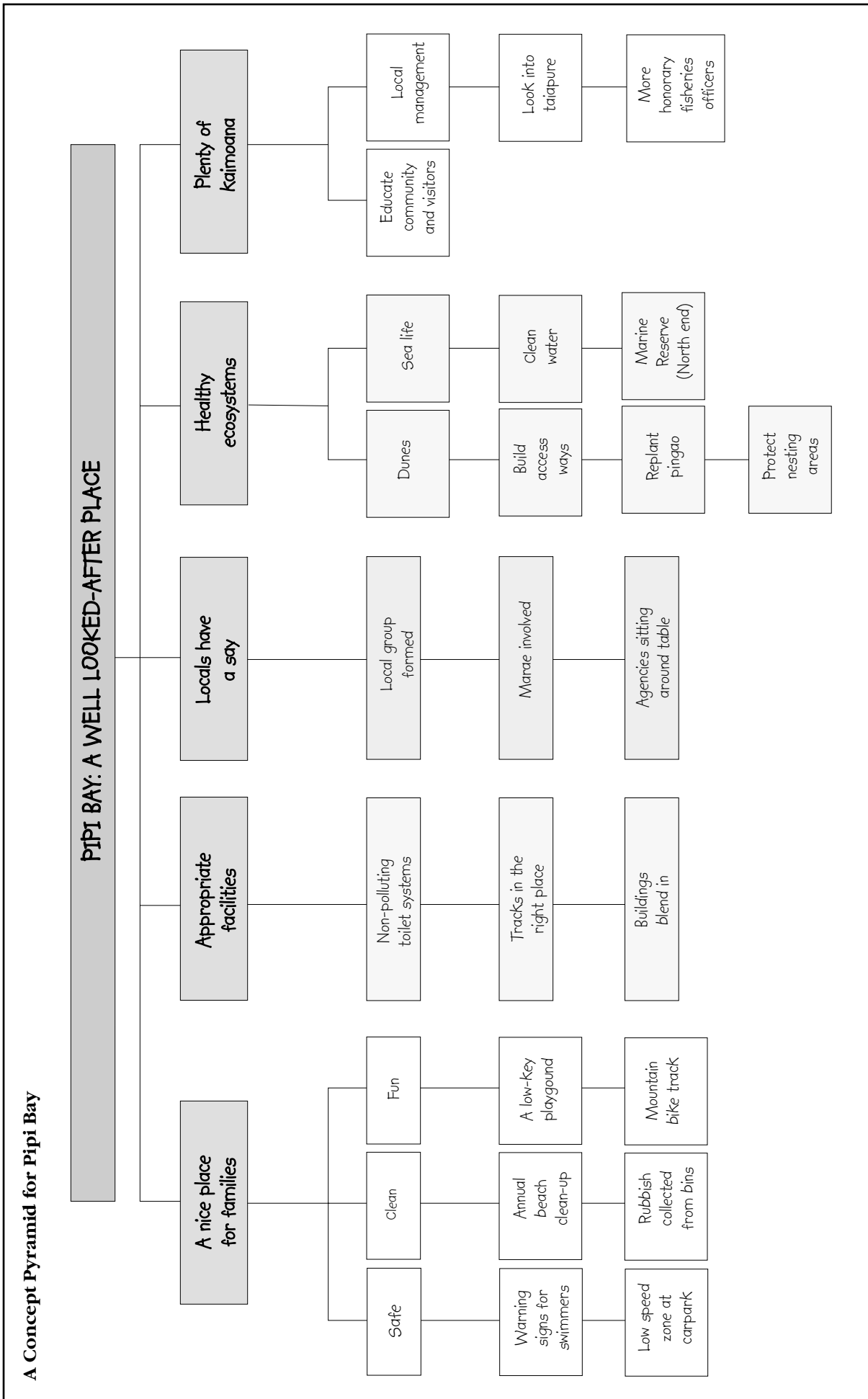
Concept pyramids can be used when a group is tackling a complex issue and has to produce a plan. It involves facilitating the group to link its vision to overall goals, objectives and activities. Often with a complex issue there are also conflicting goals or expectations. A concept pyramid helps people to share ideas, connect goals together into a 'bigger picture' and link them to an action plan.

Building a concept pyramid requires that the leader has skills in facilitation, clustering, and strategic planning.

1. Introduce the concept pyramid and the general issue – for example '*What we want for Pipi Bay.*'
2. Ask participants to write down on sticky notes as many of their ideas about the issue as they can – one idea per sticky note. As a general rule, each idea should have more than one word. They should include a noun (naming word, e.g. beach) and an adjective (describing word e.g. natural) but no verbs (doing words, e.g. protect) because the aim is to describe what we are trying to **achieve** rather than what we want to **do**.
3. Put all the sticky notes onto a large sheet of paper where everyone can see them. The ideas (or concepts) form the bottom layer in the concept pyramid. Group them together into common themes, checking with the authors. Aim for no more than 5–7 concepts in a group and give each cluster a title. This title becomes a component in the next layer up the pyramid. The process continues until there is a top layer of only 5–7 concepts immediately under the space for the goal. Now you can start 'laddering' and 'pyramiding' to fill in the gaps.
4. **Laddering** is used when the initial ideas refer to specific behaviours or actions that you want to link to higher goals. By laddering up the hierarchy it is possible to build on what people **do** to discover what they want to **achieve**. A typical 'laddering upwards' questions might be '*If you achieve all these things, what will be the result...?*' Such probing continues as you build your concepts into layers of clusters going up the pyramid.
5. **Pyramiding** (or laddering downwards) is used when the initial ideas are very general, lacking detail about what is required. For example, for the idea 'a nice place for families' the pyramid question might be '*How do you know when a place is nice for families?*' This process moves down the pyramid towards more specific concepts.
6. The next step is to define the 'goal' at the top, which is the culmination of all the ideas people have identified. Ask the group to examine what it's prepared so far and decide on the overall goal (overarching concept) of the project.

This process creates a descriptive diagram that links the original issue or vision, the overall goal, secondary goals and their basic concepts together. It can be used later for action planning by getting the group to identify and select priority actions to contribute towards realising the overall goal.

<sup>25</sup> This tool is adapted from one used by Terry Parminter of AgResearch.



## ACTION PLANNING

Action planning involves working out the tasks required to complete each of the goals and/or objectives. Actions should be specific and assigned to someone to do within a timeframe. Sometimes a bigger action will have a series of discrete tasks sitting beneath it. During your strategic planning, you may just want to identify the big actions, a completion date and a key person responsible, and leave the specific tasks to be filled in at a later time.

Some actions for Pipi Bay might be:

Actions for Goal One: North end of Pipi Bay achieves status as a marine park by 2006.

<b>ACTION</b>	<b>WHO</b>	<b>WHEN</b>
Consult with tangata whenua	Michelle and Riki	This month
Contact commercial fishers	Michael B	By end June
Get in touch with DOC and Ministry of Fisheries	Helen	This month
Talk to next sports fishing club meeting	Liz	17 June
Obtain application form for a marine park	Dave	30 June
Advertise locally for members of sub-committee	Hinemoa	1st week July
Convene sub-committee to complete first draft	Helen and others	20 July
Group considers first draft	All	1 August

### Action planning process

1. For each of your priority objectives or goals, brainstorm possible actions. Ask *'What actions/activities will enable the goals to be achieved?'*



See Section 6 for more on brainstorming.

2. Choose some priorities from among the ideas. In assessing the possible actions, consider:

- Which actions are easily accomplished?
- Which actions could provide some momentum for the project?
- Which actions contribute most to achieving the objective (or goal)?

Prioritise your actions, using a voting technique or the matrix below, where the group ranks each action on a scale of one to five, where 1 means 'not much' and 5 means 'a lot'.



See Section 6 for ideas on voting techniques.



## Example matrix for prioritising actions to achieve Goal One

<b>ACTION</b>	<b>Easy to do</b>	<b>Provides momentum</b>	<b>Contributes to goal</b>	<b>Helps with other goals</b>
Consult with tangata whenua	3	4	5	5
Contact commercial fishers	3	4	5	2
Contact DOC and Ministry of Fisheries	4	4	5	3
Talk to sports fishers	5	4	5	3
Obtain application form	5	4	5	1
Visit existing marine park	3	5	3	1
Advertise locally	3	5	5	4

## Key

1 = doesn't help much... 5 = helps a lot ... towards achieving the goal(s)

## 3. Timetable your actions – to help you get your key actions in order, consider:

- Which are the most urgent actions/issues?
- Which actions will pave the way for other actions?

A useful technique is to write each action on a sticky note and move them around on a timeline, sorting them into order to be actioned. This helps you develop a monthly calendar of tasks.

## 4. Assign each action to a person.

## 5. Identify any other people, equipment and resources necessary. Consider:

- What skills are held by individuals in the group?
- What outside expertise is needed. Who could provide it?
- How much money is required?
- Where will the resources come from?

## 6. Record your actions, responsibilities, resources and timing in a table like the one on the next page.

## 7. Assign someone to monitor progress, remind people of deadlines and generally keep an eye on the process.

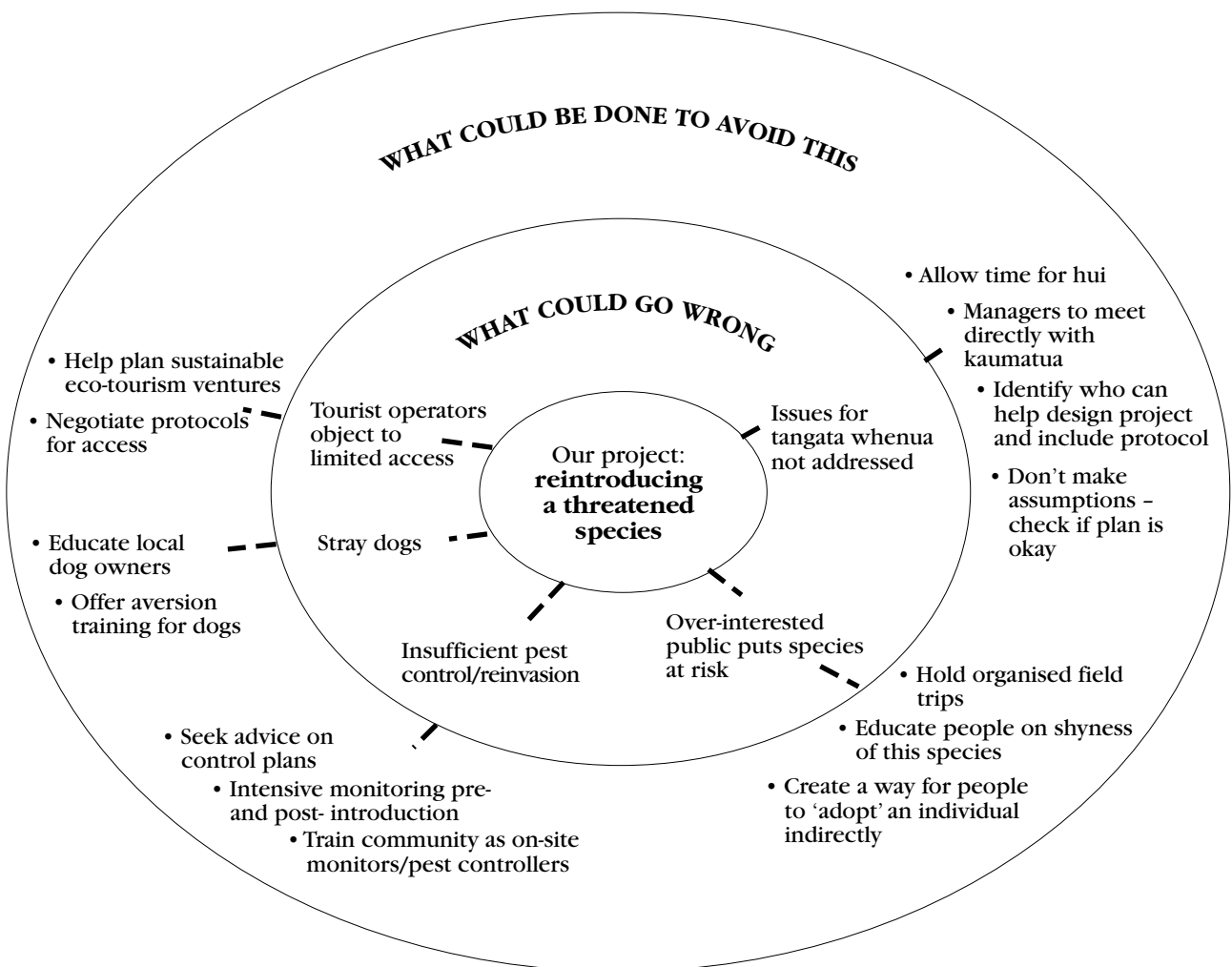
### ACTION PLAN TEMPLATE

<b>Group/Project name:</b>		<b>Goal/objective</b>	
<b>Task</b>	<b>Who Responsible</b>	<b>Resources Required</b>	<b>By When</b>

## CONTINGENCY PLANNING<sup>26</sup>

If your project is large and/or likely to be controversial, it can be useful to do some contingency planning or 'risk assessment' during your planning. This could also be useful for critical events – for example, a public meeting about your proposal.

1. Write your project or activity name in the middle of a large sheet of paper.
2. As a group, brainstorm all the things that could go wrong with your project. Write these in a different colour around the activity heading.
3. Consider what steps you'd need to take to reduce the risk of each of these things going wrong. Write these in another colour around the outside. If one step to reduce a risk will also help reduce another risk, use symbols or lines to connect the points.



<sup>26</sup> This tool is adapted from one used by Beth Neill, a Waikato community psychologist.

## SWOT ANALYSIS

This tool can be used to see how capable your group is of undertaking what you want to do. It allows you to assess the context you're working in, and identify gaps in skills and knowledge, which if filled can increase your project's chances of success.

1. Introduce the purpose of the exercise - for example, *'to assess our current capability to undertake our project to ....'*
2. On large pieces of paper set side by side (or on a large whiteboard) write up the following headings:

Strengths	Weaknesses	Opportunities	Threats

3. Create lists underneath these. Strengths and weaknesses are **internal** (features of your group) while opportunities and threats are **external** (features of your environment or context).
4. Use the data to help you work out actions you might need to take, or adjustments you could make to your project – for example, contingency planning to address threats.

## 8. Reviewing events or group progress

A lot of valuable lessons and goodwill can be gained from evaluating your events and reviewing progress as a group. This section contains some different evaluation methods. You should read these in conjunction with Section 6 of the *Guide for Community Conservation Projects*, which has a worksheet with step-by-step guidance on how to design your evaluation.

### EVALUATING A COMMUNITY EVENT

Evaluating your event can be as simple as asking each other, *'how did we go?'* Or it may be a more thorough exercise checking with all participants on their views.

#### **Your purpose – what to evaluate**

Decide what it is that's important to evaluate. It might just be finding out what worked and what didn't, so you can improve things for next time. It might be more specific, such as how well organised you were, whether you met the needs of the people who came, whether you met the expectations of sponsors, or whether participants learned something.

#### **Your approach – how to evaluate**

Unless you have a well-resourced group and someone willing to do some follow-up, it's useful to evaluate on the day.

For a meeting or seminar, you might allow time at the end of the day for verbal feedback, either a round or an open discussion (remember to record the points raised). Ask for positive thoughts about the day as well as suggested improvements. Alternatively, allow time to hand out a feedback sheet for people to fill in on the spot.

For a field day or event where people leave at different times, you can hand out a short survey to people as they arrive and request they fill it in before leaving. Provide a box at the site exit, or at the front of the bus, and have someone on hand to remind people as they leave. Don't expect people to mail a form back to you.

If you run out of time to undertake a thorough evaluation, a simple technique is to draw a horizontal line on a large sheet of newsprint with a happy face at one end and a sad face at the other. Participants mark along the line how they rate the event and write any comments on sticky notes underneath.

Another option is to phone a sample of participants about a week after the event.

### Your questions – how to get the information you want

Design (and test) questions that will suit your evaluation purpose. You may want a mix of quantitative responses (things you can count) as well as qualitative (descriptive) information.

To get quantitative responses, ask people yes/no questions or get them to rank on a scale of 1–5. These can help you prove to sponsors or managers that your objectives were met. For qualitative responses, ask open questions (ones that cannot be answered with a yes or a no). These will give you ideas for improving things.

### FEEDBACK SHEET

#### Example of questions for a simple feedback sheet

Evaluation purpose: to identify what worked and didn't work for people at a seminar.

- The purpose of today was *xyz*. Overall, how well was this met?
- (Rank on scale 5= very well, 1= not at all)
- Which session was the most useful? Why?
- Which session was the least useful? Why?
- What improvements can you suggest for future seminars?

If you require more detail, other questions could relate to such things as:

- What did participants gain from being involved?
- What were some of the highlights for them?
- What further information do they require?

### 'H FORM' OR GOAL POSTS<sup>21</sup>

The 'H form' is a more structured feedback sheet, which allows people to work together to evaluate an event. This technique can be used by a small group (4–8 people) – for example, the event organisers. If you have large numbers, break into two or more groups.

1. Using a whiteboard or flipchart draw some goal posts. Write 0 at one end of the cross-bar and 10 at the other end (see diagram A below).
2. Get each person to place a mark on the crossbar to indicate where they would rate the event between 0 and 10.
3. Give each person three sticky notes to write down three things they regard as positive about the event. Stick these on the right-hand side of the goal post.
4. Using three more sticky notes (a different colour provides a visual contrast), ask each person to write down a maximum of three negatives associated with the event. Stick these on the left-hand side of the goal posts.
5. Taking into account the positive and negative points, assign a group mark as to how you would rate the event. It is possible for the group mark to vary considerably from first round marks – it's okay to alter your opinion! Write this number above the crossbar.
6. Below the crossbar, list the collective ideas from the group about how to improve future events (see diagram B).

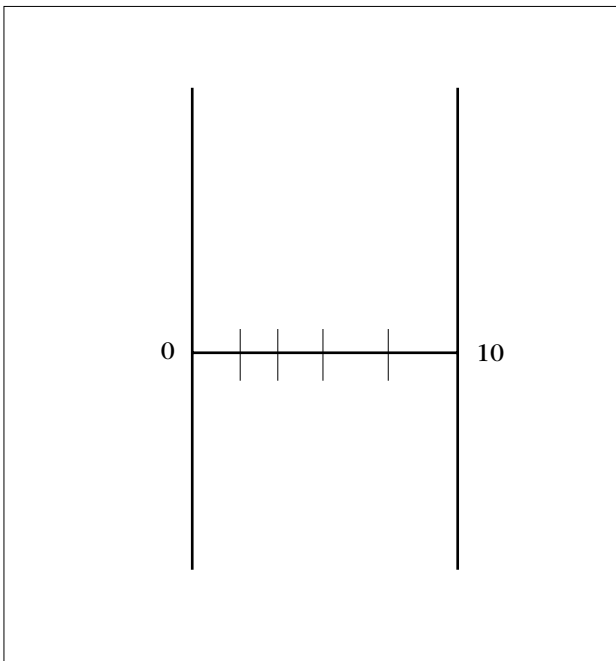


Diagram A

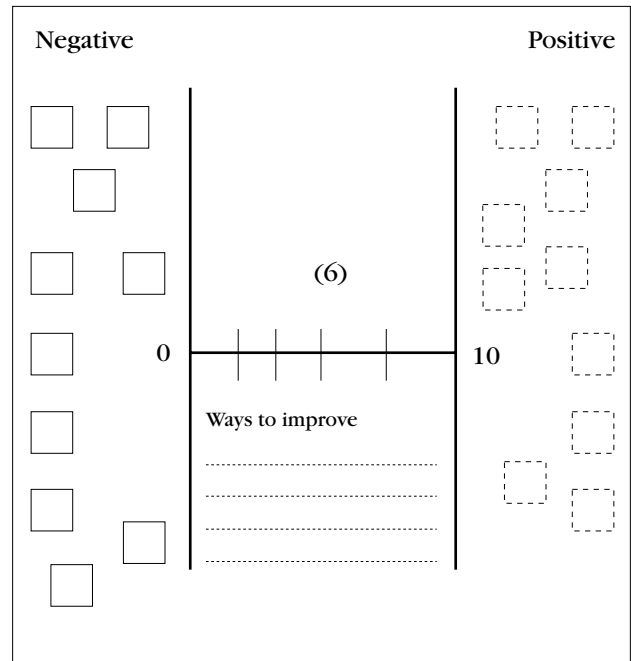


Diagram B

## REFLECTING ON PROGRESS AS A GROUP

In addition to evaluating specific events, a periodic review of your overall progress as a group can produce many helpful insights and generate a sense of achievement. The following technique may be useful.

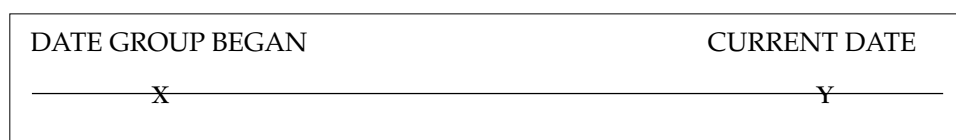
### **Taking stock of the past and charting the future**<sup>27</sup>

This technique uses a timeline as a focal point for a group reviewing its achievements to date and looking at 'where to from here'.

Time: 2 hours.

Materials: A1 flipchart sheets, sellotape, Blu-tack, black, red and blue marker pens, large wall to pin sheets to, or a series of oblong tables that can be joined end to end.

Preparation: Join four A1 sheets horizontally end to end along the wall or table. Draw a line horizontally down the middle of the joined sheets. Mark the date the group began near the left hand end and the current date near the right hand end. Leave enough space for items that happened before the group started or for items in the future.



Set up a table to the side with any relevant information about the group's work – displays, past meeting minutes, the current or past action plans, photos, media clippings etc.

Follow the workshop process below.

*Recap on past activities (30 minutes)*

1. The facilitator asks questions to help the group identify its past actions. Remind people to use the information on display as required.
2. Everyone takes a black felt pen and writes past actions on the timeline at the appropriate place. Alternatively, people work in pairs, or a couple of people write as instructed by others.

*Attend to feelings (30 minutes)*

3. The facilitator asks questions that help people elicit feelings arising from the experience – highlights, low points, frustrations, satisfaction, inspiration.
4. People use a red pen to circle high points and a blue pen for low points.

<sup>27</sup> Simmons, J. 2002



*Re-evaluate the experience (30 minutes)*

5. The facilitator asks the group questions that will uncover new or improved skills, understanding and knowledge as a result of what the group has done – for example, *‘What did the highlights teach us about working together as a group? What did the low points teach us?’*
6. Record key points on flipchart paper below the timeline, using a symbol to link points to the timeline where appropriate.

*Identify possible actions (30 minutes)*

7. The facilitator asks the group questions to identify additional areas for work or examination – *‘What does our review suggest we should do differently as a group?’*
8. The facilitator asks the group questions to identify how the skills or knowledge gained will be applied – *‘What does our review suggest are the next steps for our group/project?’*
9. The facilitator asks the group questions to clarify what other resources are needed – *‘What support might we need to do this?’*
10. Record key points on the flipchart paper, using a symbol to link points to the timeline where appropriate.



## 9. Training courses

### WHO TO CONTACT FOR RELEVANT TRAINING

- New Zealand Landcare Trust – runs occasional courses for community groups on facilitation and group skills.
- Polytechnics and Universities – night classes or continuing education.
- Some rural areas have a REAP (Rural Education Activities Programme).
- Internal Affairs (Community Development section).
- Your local DOC office, regional council, city or district council.
- Toastmasters International – speaking and presentation skills.



# 10. References

Most of the following references are relatively easy to access either by purchasing or through your local library. Some references may be held by your regional council – for example, publications about Landcare groups. Contact details are provided for documents published by the Department of Conservation. A brief description is included of the contents of each resource. A selection of useful websites is also included.

## PUBLICATIONS

**Arnstein, S. 1969:** A Ladder of Citizen Participation. *Journal of the American Institute of Planners* 35, pp 216–224.

A classic in participation literature. Introduces the concept of a spectrum of involvement, from manipulation of the public through to full citizen control.

**Bell, K.S. 2002:** Assessing the benefits for conservation from Volunteer Involvement in Conservation Activities. Social science research report prepared by Enviro Solutions New Zealand Limited for Department of Conservation NZ (unpublished).

Research report detailing results of a survey of DOC volunteers and staff involved in the volunteer programme. Includes recommendations for improving how DOC works with volunteers.

Available from DOC Science Division.

**Biggs, B.J.F.; Kilroy, C.; Mulcock, C.M.; Scarsbrook, N.M.R. 2002:** New Zealand Stream Health Monitoring and Assessment:

- Kit Stream Monitoring Manual Version 2
- NIWA Technical Report 111 190 p

The kit has a stream monitoring manual that explains how to plan for, collect and record data, how to identify stream creatures and to interpret monitoring results. The other part of the kit is a set of equipment for doing the monitoring and datasheets. A computer program for data management and interpretation is also being developed. An iwi-focused version of the kit has also been developed.

You can purchase the kit through NIWA Instrument Systems in Christchurch. The contact is Lisa Miller. The full kit and manual costs \$395, but Federated Farmers members get a discount. Contact Lisa at l.miller@niwa.co.nz, phone +64 3 343 7891 or fax +64 3 343 7891. Demonstrations can be arranged through Lisa Miller. Most NIWA offices have kits and use them to demonstrate to interested parties.

**Blakeley, J.; Rush, M.; Callaghan, R. 1999:** Environmental Education: A Guide for Programme Providers – how to develop, implement and evaluate strategies and programmes. Ministry for the Environment, Wellington.

A user-friendly guide to designing, implementing and evaluating environmental education activities. Includes useful planning checklists.

This Guide can be accessed via the internet at [www.smf.govt.nz](http://www.smf.govt.nz), using the following shortcuts:  
[http://www.smf.govt.nz/results/7037\\_parta.pdf](http://www.smf.govt.nz/results/7037_parta.pdf)  
[http://www.smf.govt.nz/results/7037\\_partb.pdf](http://www.smf.govt.nz/results/7037_partb.pdf)

**Blackford, C. 1999:** Methodology for Evaluating DOC's Public Awareness Activities Department of Conservation Technical Series 19. ISBN 0478218575.

A clear, step-wise approach to evaluation which focuses on events, but recognises that public awareness goals include understanding, relationships, empowerment and process and that these may form criteria for evaluation. Covers how to plan your evaluation at the same time as you plan your project, how to gather and analyse data for improving future events.

Still in print, available from DOC Science Publishing \$12.50. Send email requests to: [science.publications@DOC.govt.nz](mailto:science.publications@DOC.govt.nz)

Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**Campbell, A. 1994:** Landcare. Communities Shaping the Land and the Future. Allen and Unwin, Sydney.

This is a compilation of lessons, case studies and insights from Andrew Campbell, who was a driving force behind Landcare groups and whole farm planning in Victoria, and then became the National Landcare Facilitator.

**Campbell, P. 2002:** Communicating with Tangata Whenua. Presentation from Community Conservation Training Course, Department of Conservation, Whangarei.

**Campbell-Hunt, D. 2002:** Developing a Sanctuary: the Karori Experience. Victoria Link Ltd, Wellington.

This is the full history of the development of the Karori Wildlife Sanctuary. It covers in detail how the Sanctuary was set up, including negotiating with Councils, concept planning, fundraising, the fence construction, pest eradication, and species reintroduction.

**Chamala, S.; and Mortiss, P. 1990:** Working Together for Land Care. Australian Academic Press, Brisbane.

The authors have a background in participatory extension, and farmer learning. The book covers a range of material on group process and collective learning.

**Collins H.; and Mulcock, C. 1995:** The Landcare Action Guide/Te Whakaipo Whenua: A Kit for Setting Up and Monitoring a Landcare Group. WDFP (Women's Division Federated Farmers – now Rural Women), Wellington.

This is a comprehensive and easy to use guide to setting up local groups in a New Zealand context. The contacts section is now mostly out of date, but the rest of the Guide is very worthwhile.

The Landcare Action Guide is available for \$25.00 from:

The Secretary  
Rural Women New Zealand  
PO Box 12021, WELLINGTON  
Tel 04 4735524, Fax 04 4728946  
Email: [ruralwomen@clear.net.nz](mailto:ruralwomen@clear.net.nz)

**CRESA (Centre for Research, Evaluation and Social Assessment) 1998:** Community Consultation by the Department of Conservation: an independent review. Department of Conservation, Wellington. ISBN 0478217684.

A review of DOC's consultation practices using case studies based on interviews and focus groups with DOC staff, and external people involved in developing Conservation Management Strategies and concessions. Includes recommendations for more effective consultation processes.

No longer in print, not available from DOC Science Publishing. Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**CRESA (Centre for Research, Evaluation and Social Assessment) 2001:** Formative Evaluation of Design and Implementation of Nine Budget 2000 Conservation Awareness Projects. Department of Conservation.

Looks at nine projects and gives an overview of what has/hasn't been effective in design and implementation, and how they could be improved. Also looks at performance monitoring tools and DOC operational arrangements that work.

Not held by DOC libraries. Not held by other libraries.

**Department of Conservation 1989:** [Project Conservation. Volunteers in Conservation.] Guidelines for Conservation Staff Working with Volunteers. Department of Conservation, Wellington. ISBN 0478010915.

A user-friendly guide to the pitfalls and potential of working with volunteers, with some recommended practices to follow.

No longer in print. Available for loan via the Interloan Scheme: Held by DOC libraries. Otherwise only held by depository libraries.

**Department of Conservation 1998:** Cooperative Conservation Management in New Zealand/Aotearoa – Source documents Volume One. External Relations Division, Department of Conservation, Wellington. ISBN 047821792-7.

Contains actual examples of protocols, deeds and contracts between communities and DOC.

No longer in print – possibly a few copies held by External Relations Division, HO, DOC, PO Box 10-420, Wellington. Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**Department of Conservation 1999:** 'Over the Fence' Establishing Long Term Community Relationships in South Westland. Franz Josef *Waiau* Area Office, Department of Conservation.

A fact-sheet style publication, outlining how this Area plans its community relations activities in a region where DOC manages 78% of the land.

Not held by DOC libraries, not held by other libraries.

**Department of Conservation and Ministry for the Environment 2000:** The New Zealand Biodiversity Strategy: Our Chance to Turn the Tide. ISBN 0-478-21919-9.

This strategy sets out a framework for action to conserve and sustainably use and manage New Zealand's biodiversity, with an emphasis on indigenous biodiversity.

Now out of print. Obtainable from [www.biodiversity.govt.nz](http://www.biodiversity.govt.nz)

**Department of Conservation 2001a:** Community Conservation Infokit: a Practical Guide for Community Conservation Projects. Department of Conservation – Waikato Conservancy, Hamilton.

This is a folder of factsheets covering technical aspects of conservation (e.g. pest control, bush monitoring) as well as some process information (e.g. a funding directory, how to set up a legal entity for a group). Updated in 2002.

Other references that this kit lists (for bush monitoring) are:

- **Handford, P. 2000:** Native Forest Monitoring, Forme Consulting Group Ltd, Wellington. This publication is available at [www.mfe.govt.nz](http://www.mfe.govt.nz).
- **Payton et al. 1999:** Foliar Browse Index, Landcare Research Ltd, Wellington.
- **Waikato Conservation Board 1997:** Monitoring the health of your bush, Hamilton. Available for loan via the Interloan Scheme. Not held by DOC libraries, held by other libraries.

**Department of Conservation 2001b:** Consultation Guidelines QN 1213, Department of Conservation, Wellington.

Has a 'when to consult' flowchart which includes the risk of not consulting. Also a template for preparing a consultation brief. Explains 5 principles: be open to new ideas, run an efficient consultation process, get the best information from the community, consult with tangata whenua, complete the consultation exercise. Also covers consultation techniques, including guidelines for consulting with tangata whenua. An Appendix outlines feedback from associates about what they want from consultation.

Internal document, available from DOC Intranet (ie could be copied if requested).

**Department of Conservation 2001c :**Te Kete Taonga Whakakotahi. A Conservation Partnerships Toolbox (draft). In Department of Conservation 2001: Nga Akiakitanga Nuka Kaupapa Maori a Te Papa Atawhai: Kaupapa Maori Strategic Policy Initiatives. Department of Conservation, Wellington.

Gives guidance on building relationships with tangata whenua and on seeking ways through inevitable tensions. Outlines a spectrum of partnerships and how to decide which is appropriate. Covers how to craft written partnership agreements, characteristics of successful partnerships, examples of non-statutory mechanisms and relevant considerations for devolution and statutory means to do so. The full set of documents in *Nga Akiakitanga* cover:

- Giving Effect to the Principles of the Treaty of Waitangi
- Messages from Past Consultation with Maori
- Waahi Tapu Policy Guidelines
- Customary Use of Natural Resources.

Still in print, some copies available from Conservation Policy Division, HO, DOC, PO Box 10-420, Wellington. Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.



**Department of Conservation 2001d:** Messages from Consultation with Maori. In Department of Conservation 2001: Nga Akiakitanga Nuka Kaupapa Maori a Te Papa Atawhai: Kaupapa Maori Strategic Policy Initiatives. Department of Conservation, Wellington.

Maori perspectives on what partnership with the Department of Conservation means in practice.

Still in print, some copies available from Conservation Policy Division, HO, DOC PO Box 10-420 Wellington. Available for loan via the Interloan Scheme: Held by DOC libraries, Held by other libraries.

**Department of Conservation 2001e:** Restoring the Dawn Chorus 2001–2004. Department of Conservation, Wellington. ISBN 0478221010.

Strategic document outlining the key steps to be taken towards this vision and the national priority outcomes sought.

Still in print, available from External Relations Division, HO, DOC, PO Box 10-420, Wellington. Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**Department of Conservation 2001f:** Protecting and Restoring our Natural Heritage – a practical guide. Canterbury Conservancy, Department of Conservation. ISBN 0478221207.

An important basic reference for ecological restoration.

Available on the DOC website at <http://www.doc.govt.nz/Regional-Info/010~Canterbury/005~Publications/Protecting-and-Restoring-Our-Natural-Heritage/index.asp>

**Department of Conservation 2002a:** Conservation With Communities: Working Together for Conservation. Department of Conservation, Wellington.

A strategy to improve the ability of the Department of Conservation to work with communities to achieve enhanced conservation outcomes.

Held by DOC libraries.

**Department of Conservation 2002b:** Conservation With Communities: Background Paper. Unpublished, Department of Conservation, Wellington.

This report gives the detailed background to the issues surrounding Conservation with Communities, including some of the organisational barriers to developing this work area. It includes appendices to aid decision-making about working with communities.

**Department of Conservation 2002c:** Restoring the Dawn Chorus 2002–2005. Department of Conservation, Wellington. ISBN 0478222645.

Updated version of DOC Statement of Intent.

Still in print, available from External Relations Division, HO, DOC, PO Box 10-420, Wellington. Available for loan via the Interloan Scheme: Held by DOC libraries.

**Department of Conservation** Public Relations Plan template (CR1294).

A template for DOC staff developing a public relations plan.

Internal document, available from DOC Intranet (could be copied if requested).

**Department of Justice 1997:** How to Get the Best out of Planning: a guide to facilitating meetings. Department of Justice Planning Reform Unit, Victoria, Australia.

A step-by-step guide to planning effective meetings with an emphasis on public consultation meetings such as those often required as part of statutory planning.

**Donaldson, C. 1994:** Working in Multi-stakeholder Processes. Environment Canada.

A set of notes based on Canadian work bringing communities and agencies together to work on environmental issues in catchment and coastal management. Promotes an ecosystem-based approach and a participatory style of working.

**Eckman, R. 1997:** An Introduction to Project Management. Workshop presented to New Zealand Planning Institute conference, Palmerston North. An introduction to the basics of effective project management.

**Environment Waikato 1997:** Welcome to the Wonderful World of Care: Guidelines for Working with Care Groups. Environment Waikato, Hamilton. This manual is based on Environment Waikato's systems and procedures for supporting communities who want to form Landcare groups. It contains useful information for staff on responding to enquiries, setting up and working with a group.

**Fitzgerald, G. 1999:** Community Involvement in Conservation Management Issues: A New Zealand Action Research Project. Department of Conservation Technical Series 21, Wellington. ISBN 0478218621.

A detailed report on the process used for a participatory, community-based project with a flexible approach. It covers some 'rules of thumb' for facilitators and some helpful attitudes and behaviours to cultivate. Also refers to other books which offer examples of participatory techniques:

- **Taylor, N.; Goodrich, C.; Bryan, H. 1995:** Social Assessment: Theory Process and Techniques.
- **Davis-Case, D. 1990:** The Community's Toolbox: The Idea, Methods, and Tools for Participatory Assessment, Monitoring and Evaluation in Community Forestry. UNFAO, Rome.
- **Sarkissian, W.; Perlgut, D. (eds) 1994:** The Community Participation Handbook: Resources for Public Involvement in the Planning Process. Institute for Science and Technology Policy, Murdoch University, Perth.

Still in print, available from DOC Science Publishing \$22.50. Send email requests to: [science.publications@DOC.govt.nz](mailto:science.publications@DOC.govt.nz). Available for loan via the Interloan Scheme: Held by DOC libraries, and by other libraries.

**Fleming, N. D. 2001:** Teaching and Learning Styles, VARK Strategies, ISBN 0-473-07956-9.

This book has ideas about how instructors can cater for different learning styles.

It can be ordered through [www.vark-learn.com](http://www.vark-learn.com). This website also has a questionnaire that can help you identify your own learning style.

**Forgie, V.; Horsley, P.; and Johnston, J. 2001:** Facilitating Community-Based Conservation Initiatives. Science for Conservation 169. Department of Conservation, Wellington. ISBN 0478220219.

Reviews the full rationale for community-based conservation initiatives, benefits and approaches, specifically within the context of the Department of Conservation.

Still in print, available from DOC Science Publishing \$30.00. Send email requests to: [science.publications@DOC.govt.nz](mailto:science.publications@DOC.govt.nz). Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**Hei Hei, S. 2002:** Communicating in Communities: the cultural forums - speaking in local and Maori communities. Presentation to NZAEE conference January 2002, Hamilton.

**Hughey, K. F. D. 2001:** Perceptions of the State of the New Zealand Environment: findings from the first biennial survey undertaken in 2001. Lincoln University, Canterbury.

A survey of public perceptions about the state of the New Zealand environment.

**Hunter, D.; Bailey, A.; Taylor, B. 1992:** The Zen of Groups. Tandem Press, Auckland.

A useful, easy to read handbook on groups and group facilitation. Has an excellent tool kit of methods and techniques for a wide variety of situations.

**Hunter, D.; Bailey, A.; Taylor, B. 1994:** The Art of Facilitation. Tandem Press, Auckland.

An easy to read handbook that looks at the distinctions involved in facilitating a group. A good resource for those wanting to deepen their understanding and skill in facilitation. Contains tools and techniques.

**James, B. 1990:** A Bicultural Partnership for Te Waihora (Lake Ellesmere): A Case Study in Management Planning. Science and Research Series No 41. Department of Conservation, Wellington. ISBN 0478013264.

A useful case study in preparing for management discussions between Maori and the Crown.

No longer in print, not available from DOC Science Publishing. Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**James, B. 1993:** The Determinants of Environmental Attitudes: A Review of the Literature. [Department of Conservation] Wellington Regional Council, Wellington.

A review of the evidence for links between attitudes and behaviour.

Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries

**James, B. 2001a:** A Performance Monitoring Framework for Conservation Advocacy. Department of Conservation Technical Series 25, Wellington. ISBN 0478220057.

Covers how to design performance measures and some questions to consider, for example: how many measures, the use of direct versus surrogate measures with a checklist for gaining the right mix of performance measures. The model is based largely on 'campaign'-style advocacy rather than relationship building.

Still in print, available from DOC Science Publishing \$12.50. Send email requests to: [science.publications@DOC.govt.nz](mailto:science.publications@DOC.govt.nz). Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**James, B. 2001b:** Understanding the Conservation Expectations of Aucklanders. Science for Conservation 172. Department of Conservation, Wellington. ISBN 0478220235.

Based on focus groups with different parts of the Auckland population and with those considered community conservation partners, this report explores their perceptions of the Department and their aspirations for conservation.

Still in print, available from DOC Science Publishing \$22.50. Send email requests to: [science.publications@DOC.govt.nz](mailto:science.publications@DOC.govt.nz). Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**James, B. 2001c:** Evaluation of Kiwi Advocacy Programmes in Northland and Coromandel. Science for Conservation 161. ISBN 0478220073.

Examines practice and offers lessons learned based on discussions with local people and staff. Issues for improvement included both being a good model/neighbour, having a higher profile, inter-agency coordination, and following up on requests for help/inviting involvement/being available to chat/making use of local knowledge by consulting.

Still in print, available from DOC Science Publishing \$22.50. Send email requests to: [science.publications@DOC.govt.nz](mailto:science.publications@DOC.govt.nz). Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries.

**Moss, G. 1990:** Be An Achiever: a handbook to get things done. MAF Primedia Bookshop, Wellington.

An easy to read handbook of organisational and project management techniques for people trying to make things happen – at work or in the community.

**Moss, G. 1996:** Managing For Tomorrow: a mentor for new team leaders. Moss Associates, Wellington.

An easy to read handbook with tips and techniques for effective leadership.

**New Economics Foundation 1998:** Participation Works! 21 Techniques of Community Participation for the 21st Century. New Economics Foundation.

Describes in general terms some processes for involving communities in consultation and action. Gives some contacts, publications and recommended uses for each technique as well as costs associated and case studies where they have been used.

**New South Wales Environmental Protection Agency and New South Wales Department of Land and Water Conservation, 1997:** What We Need is a Community Education Project. NSW EPA, Australia.

**O'Brien, M. 1997:** Participatory Conservation: The Role of Governance. Paper presented to Environmental Justice: Global Ethics for the 21st Century. Melbourne, October 1997.

A thought-provoking paper on the need to align internal processes to be flexible and responsive to enable staff to adopt these approaches with communities.

**Orange, C. 1987:** The Treaty of Waitangi. Allen and Unwin/Port Nicholson Press, Wellington.

**Pettigrew, J. 1994:** Advancing Public Awareness – Factors influencing the effectiveness of public information messages. A report for the Public Awareness Unit, Department of Conservation. ISBN 0478017898.

A useful review for those planning media campaigns or awareness-raising.

Still in print, (only just) a few copies still available from DOC Science Publishing \$10.00. Send email requests to: [science.publications@DOC.govt.nz](mailto:science.publications@DOC.govt.nz). Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries

**Pretty, J.; and Frank, B. 2000:** Participation and Social Capital Formation in Natural Resource Management: Achievements and Lessons. pp. 178–187 in Proceedings, International Landcare 2000, Melbourne, Australia, 2–5 March 2000.

A paper suggesting that community groups relate in different ways to other groups and organisations, and that capacity building can assist groups to become interdependent, information seeking, reflective and open.

**Ringer, M.; and O'Brien, M. 1997:** Building Relationships with Participants in Department of Conservation programmes: effective management of experiential groups in the outdoors. Department of Conservation Technical Series No. 12, Wellington. ISBN 0478019459.

Explores interpersonal behaviours and experiential learning in relationship building, giving ideas and examples.

Still in print, available from DOC Science Publishing \$12.50. Send email requests to: and other libraries

**Ritchie, H. 2000:** Rural Community Conservation Project – Action Research Framework. Unpublished, Department of Conservation, Waikato Conservancy, Hamilton.

This outlines the research approach used in this project, which combines achieving change on the ground at the same time as reflecting on success factors and learning from the experience.

Not held in DOC libraries.

**Ritchie, H. 2001:** Rural Community Conservation Project Report. Unpublished report, Department of Conservation, Waikato Conservancy, Hamilton.

A project report on the first year of this project. Covers setting up a working group with community people and DOC staff, how community groups were consulted and what actions were trialed, plus formative evaluation of results.

Not held in DOC libraries.

**Ritchie, H.; and Simmons, J. 2001:** Guidelines for Enhancing Community Conservation. Unpublished draft, Department of Conservation, Waikato Conservancy, Hamilton.

Based on the Rural Community Conservation Project, these draft Guidelines reported back to staff on what community conservation groups wanted by way of support and provided ideas for meeting these needs. This information has been incorporated into *From Seed to Success*.

Not held in DOC libraries.

**Rush M. 1997:** Achieving Effective Rural Participation in Resource Management. Presentation to New Zealand Planning Institute Conference, Palmerston North, 1997.

Introduces a framework and principles for effective consultation with rural communities.

**Rush M.; Wharfe L.; Collins, H.; Thomas K.; Callaghan, R.; Blakeley, J. 1999:** Towards a Set of Principles for Effective Environmental Education Strategies and Programmes and their evaluation: a review of the literature. Ministry for the Environment, Wellington, New Zealand.

A review of environmental education literature identifying 'best practice' principles for practitioners involved in developing strategies and programmes for community and adult environmental education. Contains a significant section on environmental education evaluation and principles for making evaluation effective.

This literature review can be accessed via the internet at [www.smf.govt.nz](http://www.smf.govt.nz/results/7037_lit_review.pdf) using the shortcut [http://www.smf.govt.nz/results/7037\\_lit\\_review.pdf](http://www.smf.govt.nz/results/7037_lit_review.pdf)

**Rush M. 2000:** A Method for Critical Reflection in Learning in the field of Agriculture and Rural Development. Paper submitted for requirements of Development Core paper, Masters in Applied Science, University of Western Sydney, October 2000.

**Simmons, J. 2002:** Guidelines for Organising Events. Unpublished report, Department of Conservation, Hamilton.

Internal document WAICO1856, regularly updated.

**Smith, W.A. 1995:** Behaviour, Social Marketing and the Environment. In Palmer, J.; Goldstein, W.; Curnow, A. (Eds.): *Planning Education to care for the earth*.

**Spencer, L.J. 1989:** *Winning Through Participation*. Kendall/Hunt Publishing Company, Iowa.

A comprehensive description of the Technology of Participation facilitation methods developed by the Institute of Cultural Affairs. Includes case studies, examples, and applications of the methods to areas such as strategic planning.

**Sunde, C.; Taiepa, T.; Horsley, P. 1999:** *Exploring Collaborative Management Initiatives between Whanganui Iwi and the Department of Conservation*. Massey University, Occasional paper (School of Resource and Environmental Planning) No. 3, Palmerston North. ISBN 0473061597.

A review of the options for co-management between DOC and Whanganui Iwi, with many of the findings having a more general application.

Available for loan via the Interloan Scheme: Held by DOC libraries, and other libraries (not widely).

**Svantesson, I.1989:** *Mind Mapping and Memory: powerful techniques to help you make better use of your brain*. Swan Communications, New Zealand.

**Sykes, J.B. (Ed.) 1982:** *The Concise Oxford Dictionary*, Clarendon Press, Oxford, UK.

**Tauroa, H.; and Tauroa P. 1986:** *Te Marae. A Guide to Customs and Protocol*. Reed, Auckland.

An easy to read introduction to marae customs and protocol.

**Tuckman, B. 1965:** *Forming, Storming, Norming, Performing team development model*.

[www.businessballs.com/tuckmanformingstormingnormingperforming.htm](http://www.businessballs.com/tuckmanformingstormingnormingperforming.htm)

**Unknown author 1996:** *Management Topic 29 Monitoring and Evaluation*. Draft.

This paper discusses the rationale for ecological monitoring. It sets out what should be considered when putting together a monitoring programme.

View the paper at: <http://www.fs.fed.us/eco/ecmtext.htm> or access it through [http://nrm.massey.ac.nz/changelinks/par\\_eval.html](http://nrm.massey.ac.nz/changelinks/par_eval.html). Scroll down to 'Improving Environmental Monitoring.' Click on monitoring and evaluation.

**Vanclay, F. 1992:** *The Social Context of Farmers' Adoption of Environmentally Sound Farming Practices*. pp. 94–121 in Lawrence, G.; Vanclay, F.; Furze, B. (Eds): *Agriculture, Environment and Society*. MacMillan, Melbourne.

An insightful analysis of the rationality behind landholders' decisions in the Australian Landcare context, and the weaknesses of relying on changing attitudes as a strategy to achieve behaviour change.

**Wadsworth, Y. 1991:** *Everyday Evaluation on the Run*. Action Research Issues Association, Melbourne.

A user-friendly introduction to evaluation. Contains examples, a listing and description of more than 80 evaluation techniques.

**Weeks, D. 1994:** The Eight Essential Steps to Conflict Resolution: preserving relationships at work, at home, and in the community. G P Putnam Sons, New York.

An easy to read step-by-step guide to conflict and how to resolve it successfully. Contains case studies and examples.

**Woodhill, J.; and Robins, L. 1996:** Participatory Evaluation for Landcare and Catchment Groups. National Landcare Programme, Australia.

A step-by-step introduction to participatory evaluation.

Can be downloaded from: [http://www.greeningaustralia.org.au/publications/our\\_pub.htm](http://www.greeningaustralia.org.au/publications/our_pub.htm)

**Wright, N. 1998:** The Media Opportunity: Guidelines for Staff. Department of Conservation, Wellington Conservancy, Wellington.

Insights into how the media work, how they source stories, media ethics, plus guidelines for staff being proactive and strategic in line with policy, conducting an interview and writing press releases (includes numerous examples). Help with aligning with operational procedure, e.g. line management and who is the appropriate DOC spokesperson.

Wellington Conservancy has an updated version of this document as a PDF.

## USEFUL WEBSITES

**Department of Conservation** – [www.doc.govt.nz](http://www.doc.govt.nz)

Contains a section on volunteers, information about DOC publications, including some in PDF format that can be downloaded, and a wide range of other conservation information.

**Community planning** – [www.communityplanning.net/contacts/contacts.htm](http://www.communityplanning.net/contacts/contacts.htm)

Helping people shape their cities, towns and villages in any part of the world. Growing numbers of residents are getting involved with professionals in shaping their local environment. This website is an essential starting point for everyone concerned. It provides easily accessible how-to-do-it best practice information of international scope and relevance.

**International Association for Public Participation** – [www.iap2.org.nz](http://www.iap2.org.nz)

This Association promotes the practice of public participation in relation to individuals, governments, institutions, and other entities that affect the public interest. The website contains a wide range of information, other links, publications and a tool kit (available to members only).



**Natural Resource Management Programme Changelinks site –**  
[www.nrm.massey.ac.nz/changelinks](http://www.nrm.massey.ac.nz/changelinks)

An on-line resource guide for those seeking to improve the use of collaborative and learning-based approaches in natural resource management. Contains some theoretical considerations, a review of participatory techniques and many interesting links to other sites. Hosted by Massey University, Palmerston North.

**New Economics Foundation –** [www.neweconomics.org](http://www.neweconomics.org)

This site explores a variety of participatory and social auditing techniques, etc. It also contains the publication '*Participation Works!*' in PDF format (see New Economics Foundation reference listed earlier).

**New Zealand Birds –** [www.nzbirds.com](http://www.nzbirds.com)

A site describing New Zealand birds and their habitat, with links to other useful sites.

**New Zealand Ecological Research Network –** [www.bush.org.nz/home/](http://www.bush.org.nz/home/)

The website of New Zealand Ecological Research Network. NZERN is a non-profit, community-driven, membership-based organisation dedicated to sharing knowledge and experiences about ecological restoration in Aotearoa-New Zealand.

The site contains information on useful contacts, regional projects, upcoming events, and a 'tool box' with information to help with ecological restoration. The site also details further resources and directories including land resources, plants and animals, bibliographies and articles, maps and downloads.

**Partnerships, Participation and Online Communities –** [www.partnerships.org.uk](http://www.partnerships.org.uk)

This is a UK site with advice on community partnerships, participation and 'on-line' communities. It includes *The Partnerships Handbook* – a guide to establishing successful partnerships with communities and avoiding pitfalls. The shortcut to this handbook is: [www.partnerships.org.uk/pgguide/pships](http://www.partnerships.org.uk/pgguide/pships).

**Green Communities Assistance Kit –** [www.epa.gov/greenkit/](http://www.epa.gov/greenkit/)

The US Environment Protection Agency provides an online step-by-step guide for communities to plan and implement sustainable actions. It is designed to help communities access tools and information about becoming more sustainable.



# 11. Funding

## NATIONAL FUNDING SCHEMES:

Organisation	Purposes Funded/Objectives/Criteria include:	Upper Limit	Closing Dates	Contact
AGMARDT Progressive Farming Grants	Although it does not generally fund conservation projects, funding directions include conservation and farming. To ensure that research, information and new technologies are relevant to farmer requirements. The aim of this programme is to assist farmers who have identified a problem and/or opportunity in the land-based industries.	Refer to website	Refer to website	The Secretary-Manager Agricultural and Marketing Research and Development Trust PO Box 399, Shortland Street, Auckland. Phone: 09-373 3370 Fax: 09-373 3488 email: agmardt@clear.net.nz
Biodiversity Advice	Purposes Funded: Provision of information and advice on native biodiversity and options for management to private land owners and managers. Aims to achieve greater protection of indigenous biodiversity outside public conservation lands. Funding for one-off projects or ongoing services.	None	Refer to website	Biodiversity Condition and Advice Funds P O Box 10-420, Wellington. Telephone: 04-4710726 Fax: 09-471 3130 Email: biofunds@doc.govt.nz Web: www.biodiversity.govt.nz/land/nzbs/land/condition.html ongoing services.
CLANZ – Community Learning Aotearoa/ New Zealand	Groups providing specific learning projects or programmes for adults. Purposes funded include conservation.	\$1,500, some grants for special projects up to \$10,000	Refer to website	Jan Prankerd CLANZ – Community Learning Aotearoa/ New Zealand National Resource Centre for Adult Learning and Community Education PO Box 12114, Wellington.
Community Work (WINZ / Dept of Work and Income)	Projects of benefit to the community and/or environment.	Refer to website	Refer to website	Your local Work and Income office Phone: Fax: email: info@winz.govt.nz Web: http://www.winz.govt.nz
Community Organisation Grants Scheme	Provision of community and social services in local communities.	Varies	August	Community Development and Funding Advisor Level 5, Westpac House, 426 Victoria Street. PO Box 19 230, Hamilton
FundView	On-line directory of funding sources for a wide variety of community projects and purposes.	Varies	Refer to specific fund	Your local library to view the database for free. If they do not subscribe, visit www.fis.org.nz/fundview.htm Click on the map to find where you can view the database for free closest to you.

Organisation	Purposes Funded/Objectives/Criteria include:	Upper Limit	Closing Dates	Contact
James and Sharon Watson Conservation Trust	Research concerning the conservation of the flora, fauna and natural features of NZ or the advancement of knowledge in these matters.	\$4,000	July	The Secretary Royal Forest and Bird Protection Society of New Zealand Inc Box 631, Wellington. Phone: 04-385 7374 Fax: 04-385 7373 email: office@wn.forest-bird.org.nz Web: http://www.forest-bird.org.nz
Lion Foundation	Most purposes considered. Must be for a charitable purpose, must benefit the local community at a grass-roots level.	Refer to website	Refer to website	Mark Forshaw Lion Foundation PO Box 4195, Shortland Street, Auckland. Phone: 09-356 1380 Fax: 09-379 3730 email: Web: http://www.lionfoundation.org.nz
Lottery Environment and Heritage	Protection, promotion, conservation of natural, historic and cultural heritage.	No set upper limit	February, May, August, November	Lottery Grants Board PO Box 805, Wellington. Phone: 0800-824 824 Fax: 04-495 7225 email: lotterygrants@dia.govt.nz Web: http://www.dia.govt.nz
Lottery General	Funding for one-off programmes and projects of regional or national significance and those which are outside the criteria or scope of other committees.	No set upper limit	February, May, August, November	Lottery Grants Board PO Box 805, Wellington. Phone: 0800-824 824 Fax: 04-495 7225 email: lotterygrants@dia.govt.nz Web: http://www.dia.govt.nz
Nature Heritage Fund	Protection of both common and rare species, habitats and communities, and the ecological processes and interaction that link them.	Refer to DOC	February, October	John Morton Executive Officer, Nature Heritage Fund PO Box 10-420, Wellington. Phone: 04-471 0726 Fax: 04-471 3018 email: jmorton@doc.govt.nz Web: www.doc.govt/community/007_conservationonprivateland/001_Nature-Heritage-Fund.asp

Organisation	Purposes Funded/Objectives/Criteria include:	Upper Limit	Closing Dates	Contact
New Zealand Game Bird Habitat Trust Board	Protection, enhancement or creation of primarily bird habitat.	Varies	May	New Zealand Game Bird Habitat Trust Board PO Box 13 141, Wellington. Phone: 04-499 4767 Fax: 04-499 4768
New Zealand National Parks and Conservation Foundation	Conservation of either natural or historic resources on either public or private land, including recreation, education, visitor and information facilities, volunteer activities, recovery programmes, science and research and community involvement.	Upper limit: Around \$5000 to \$8000	Refer to website	Executive Director NZ National Parks and Conservation Foundation Box 76 691, Manukau City. Phone: 09-269 2922 Fax: 09-269 2923 email: info@nationalparks.org.nz Web: www.nationalparks.org.nz
Nga Whenua Rahui	Protection of Maori owned indigenous ecosystems.	Refer to DOC		Executive Officer Nga Whenua Rahui PO Box 10-420, Wellington. Phone: 04-471 3107 Fax: 04-471-3018 email: Web: <a href="http://www.doc.govt.nz/commu/priv/ngawhen.htm">http://www.doc.govt.nz/commu/priv/ngawhen.htm</a>
Pacific Development & Conservation Trust	Enhancement and conservation of environment and heritage with priority to projects which benefit and involve the community, to projects with long-term impact and projects which do not have access to other funding.	No upper limit	March, September	Trust Advisor Pacific Conservation and Development Trust c/- Trusts & Fellowships Unit Department of Internal Affairs PO Box 805, Wellington. Phone: 04-495 9387 Fax: 04-495 9444 email: trusts@dia.govt.nz Web: <a href="http://www.dia.govt.nz">http://www.dia.govt.nz</a>
Project Crimson	Conservation projects for the protection of pohutukawa and rata that offer maximum public involvement. The project must provide long-term benefits to the local environment and provide tangible evidence of effective resource management.	Contact funder	March	Project Crimson PO Box 34 214, Birkenhead, Auckland. Phone: 09-480 8864 Fax: 09-480 8865 email: info@projectcrimson.org.nz Web: <a href="http://www.projectcrimson.org.nz">http://www.projectcrimson.org.nz</a>

<b>Organisation</b>	<b>Purposes Funded/Objectives/Criteria include:</b>	<b>Upper Limit</b>	<b>Closing Dates</b>	<b>Contact</b>
Queen Elizabeth II National Trust	Protection of privately owned areas of open space of natural significance.	No upper limit (contribution towards the costs of establishing covenants)		QEII National Trust regional offices Contact your nearest representative (see QEII website for information) or the National Office at PO Box 3341, Wellington. Phone 04-472 6626, Fax 04-472 5578 Web: <a href="http://www.nationaltrust.org.nz/about/contact.html">http://www.nationaltrust.org.nz/about/contact.html</a>
Robert C Bruce Trust	Supports research projects related to forests or afforestation. Provides funding to assist the planting of forests or native bush on public land.	\$5,000	October	Owen Locke Trust Manager NZ Guardian Trust Co Ltd PO Box 628, Palmerston North . Phone: 06-358 4012 Fax: 06-356 9119 email: <a href="mailto:Palmerston.North@nzgt.co.nz">Palmerston.North@nzgt.co.nz</a>
Sustainable Farming Fund	This fund specifically excludes conservation projects. However, funding directions state that the fund supports community-driven programmes aimed at improving financial and environmental performance of the land-based sectors. It will help rural communities overcome barriers to their environmental, social and economic viability.	\$200,000 per project per year	February	Sustainable Farming Fund C/- Ministry of Agriculture and Forestry PO Box 2526, Wellington. Phone: 0800 100 087 Fax: 04-460 8781 email: <a href="mailto:sffund@maf.govt.nz">sffund@maf.govt.nz</a> Web: <a href="http://www.maf.govt.nz/sff">http://www.maf.govt.nz/sff</a>
Sustainable Management Fund	Environmental topic areas including water management, biodiversity, sustainable land management, Kaitiakitanga and management of the marine environment. Activities and methods include environmental education, community awareness, best practice and environmental monitoring and reporting.	\$500,000 per year	May, November	Sustainable Management Fund Ministry for the Environment PO Box 10362, Wellington. Phone: 04-917 7400 Fax: 04-917 7523 email: Web: <a href="http://www.smf.govt.nz">http://www.smf.govt.nz</a>
Taskforce Green (Dept of Work and Income)	Community, conservation, environmental, employment.	Maximum per customer is \$11,000 incl. GST per year		Your local Work and Income office email: <a href="mailto:info@winz.govt.nz">info@winz.govt.nz</a> Web: <a href="http://www.winz.govt.nz">http://www.winz.govt.nz</a>

Organisation	Purposes Funded/Objectives/Criteria include:	Upper Limit	Closing Dates	Contact
The Ron D & E A Greenwood Environmental Trust	Assist in preservation and protection of the natural environment in New Zealand.	\$2,500		Ron Greenwood Managing Trustee The Ron D & E A Greenwood Environmental Trust c/o Environment Trust PO Box 359, Wellington
The Tindall Foundation	Projects relating to the environment under the following categories: Zero Waste to Landfills, Habitat Protection, Sustainability, Recycling, Waste Minimisation, Energy Efficiency, Organic Material.	No set upper limit		Evelyn Gauntlet Office Administration The Tindall Foundation PO Box 33 181, Takapuna, Auckland 9. Phone: 09-488 0170 Fax: 09-489 5327 email: tff@tindall.org.nz
Todd Foundation Centenary Fund	Two or three major grants are given out each year in either Environment, Conservation, Arts, Culture, Education, Health Facilities, or Research.	No upper limit – minimum expected to be \$20,000	January	Manager Todd Foundation PO Box 3142, Wellington . Phone: 04-472 2970 Fax: 04-473 4581:
Transpower Landcare Trust Grants Programme	Make a practical contribution to sustainable land management or biodiversity on private land. Promote community awareness of the need for sustainable management/ knowledge of natural management or rural communities. Enable community groups to further contribute to sustainable land management and/ or biodiversity.	Maximum \$5,000	End August and February each year.	Transpower Landcare Grants Programme, PO Box 16 269, Christchurch. Phone: 03-349 2630 Fax: 03-249 2640 email: info@landcare.org.nz Web: http://www.landcare.org.nz/action



Organisation	Purposes Funded/Objectives/Criteria include:	Upper Limit	Closing Dates	Contact
Where There's Water Fund	For environmental projects that have a water focus and are of public benefit.	Applications between \$1,000 and \$15,000 will be considered	February, August	Murray Bell Water Environment Research Foundation (NZWERF) PO Box 1301, Wellington. Phone: 04-917 7401 email: murray.bell@nzwerf.org Web: http://www.nzwerf.org/wtw
World Wide Fund for Nature Habitat Protection Fund	Restoration and conservation of critical habitats and ecosystems. Re-planting and conservation of traditional indigenous species. Promoting environmental education and building capacity to enhance awareness and understanding of conservation issues. The creation of opportunities for employment and community development.	Grants range from \$2,000 – \$20,000	February, May, August, November	Joanna Anderson Conservation Officer World Wide Fund for Nature PO Box 6237, Wellington. Phone: 04-499 2930 Fax: 04-499 2954 email: jo.anderson@wwf.org.nz Web:http://www.wwf.org.nz/conservation/habitat_protection_fund.cfm

N.B: Consider generating a similar directory of funding that is available specifically in your Conservancy or Area – for example, from regional or district councils, local community boards or trusts. Check out the Community Conservation Infokit for a Waikato example.



## LOCAL FUNDING SOURCES



## 12. Group structures and agreements

For information on the common structures available to community groups, and assistance in deciding which structure best suits your group, check out: <http://www.keepingitlegal.net.nz/about>

*Keeping It Legal E Ai Ki Te Ture* contains three types of information:

- The legal form of your organisation (different legal structures for groups)
- The laws you need to know about (affecting people, activities, premises and environment) and
- How to keep on track (compliance and insurance).

The website is structured into three sections that you can follow through:

### **Check**

The 'check' section contains a set of interactive checklists to help you work out how the law applies in your case.

### **Learn More**

The 'learn more' section contains detail on the various legal obligations that may apply in your case.

### **Take Action**

The 'take action' section is an interactive section that enables you to complete (and email!) action plans on the matters you will need to follow up.

The table over the page highlights some differences between the more common legal structures.

*Comparison of more common legal structures*

	<b>Incorporated Society</b>	<b>Charitable Trust</b>
Min no of people	Minimum of 15 members	2 or more trustees
Members	Made up of members whose role is defined by rules	May have members with some power such as election of trustees. If Trust Deed allows, trustees may set up sub committees and second people
Term of membership	Members can join and leave easily	Trustees are appointed or elected for a fixed term
Decision making	By members at general meetings and in committees. Depends on rules	Key decisions made by trustees. Members support but do not run the organisation. Depends on Trust Deed though trustees ultimately accountable
Liability	If members act in good faith within the objects of the society and not for personal gain any liability on Incorporated Society not individual	If trustees act in good faith within the objects of the trust and not for personal gain no individual liability
Tax status	May be charitable – depends on objects – conservation purposes usually OK	Must be charitable
Reporting requirements	Must file annual accounts, change of rules, name and office	Charities Act 2005 requires annual return to be made to charities Commission. Contents to be defined by regulation but not made yet. Likely it will include annual accounts
Winding up/ liquidation	Rules can provide that assets to be passed to organisations with similar objects	Trust Deed can provide that assets to be passed to organisations with similar objects