

ASSESSMENT MODULE  
FACILITATOR RESOURCES  
  
Session Agendas and Materials for Facilitators

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## INTRODUCTION

This document includes key resources from the Partners Advancing Climate Equity (PACE) Pilot Program’s Assessment Module, which have been modified to enable other facilitators and community leaders to adapt and use PACE resources. This document includes facilitator agendas from full cohort sessions and learning group sessions organized as part of the PACE Pilot Program’s Assessment Module. Additional resources, such as sample presentation slides and worksheets, are included as links.

### BEFORE YOU START

**We recommend first reviewing the** [PACE Resource Navigation Guide](https://docs.google.com/document/d/1OI2DnlXUwOQwAqzcG_GXoDAwBY4ygDG_fd6557sCikY/edit#heading=h.2hl5p8yvh81g) **to understand *what* is included in this document and *how* to utilize PACE facilitator resources best.**

The PACE Pilot Program featured a multi-faceted approach to cohort learning, capacity building, and leadership development with many interconnected program activities and structural elements. The Resource Navigation Guide provides a high-level overview of program goals and values, key terms and definitions, and important structural elements (such as the types of sessions organized, the Vision-Assessment-Strategy-Timeline (VAST) program design, and the Phase 1 syllabus) to help you best navigate and utilize PACE facilitator resources. While we designed these resources for virtual PACE sessions, you can adapt them for in-person events.

### GETTING STARTED

**We recommend creating a copy of this Google document and adapting its contents to best suit your needs, paying particular attention to the following markers:**

**→ Important guidance, displayed in purple bolded text with a purple arrow**,

*Sample PACE content to review and update, displayed in gray italicized font*, and

Standalone activities, displayed in orange boxes,   
which are also linked directly in the Table of Contents.

For more information about the PACE Pilot Program and to view additional resources for community leaders, please visit <https://sgc.ca.gov/>.

## ASSESSMENT I FULL COHORT SESSION

### KEY SESSION INFORMATION

**Key Theme/Topic:** Principles of Community, Group Governance

**Estimated Time Needed:** 2 hours

**Materials Needed:**

* Presentation Slides (e.g., PowerPoint or Google Slides)

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1HncW784IDb15RxyijLRn_sDIDOv7Rr396XmigdpJHyk/edit#slide=id.gb9441b90eb_0_624) **that you can copy, modify, and use!**

**Session Roles for Facilitators:**

**→ Update and assign roles based on your final session agenda and format.**

| **ROLE** | **ASSIGNED TEAM MEMBER** |
| --- | --- |
| Master of Ceremonies (MC) |  |
| Additional Facilitators / Breakout Group Facilitators |  |
| Presenters |  |
| Chat Monitor |  |
| Time Keeper |  |
| Vibe Checker (keeps tabs on group agreements and energy levels) |  |
| Music |  |
| Technology Lead - Recording and Breakout Groups |  |
| Notetaker(s) |  |

### 

### FACILITATOR AGENDA

#### Convene (10 minutes)

**Welcome (5 minutes)**

* Set a welcoming tone with music and greetings.
* Share ‘as you arrive’ prompt verbally and in chat.
* Share some words of welcome.

**Housekeeping (5 minutes)**

* Review group agreements and reminders.
  + *Reminders of group agreements and Zoom etiquette, self-care, etc.*

**→ Here are the** [PACE Group Agreements](https://docs.google.com/drawings/d/1ux7mChnEne7-9yD5EZjTQ7xmqIeWOi__XSqGbIchgMw/edit?usp=sharing) **as an example.**

* Provide a brief overview of the session agenda.

#### Connection (10 minutes)

**Land Acknowledgement**

* Invite one participant to provide a land acknowledgment.

**→ Rather than asking participants to provide a brief land acknowledgment as part of their introduction, we instead invited one participant to give an extended land acknowledgment for each full cohort session.**

* Prompt: 1) Place, 2) people who stewarded it prior to colonization, 3) current-day challenges and movements, 4) a land-based wisdom practice related to climate mitigation or adaptation
  + ***Example:*** *I acknowledge, I am on (or zooming in from) unceded, stolen and occupied homeland of the Ramaytush Ohlone, the original human inhabitants of this land. This land has been continuously stewarded by Ramaytush Ohlone people for at least 8,000 years and perhaps as long as 15,000 years. I acknowledge that the lush vibrancy of life - the presence of willows, the bays, the oaks, the oysters, the owls, the scrub jays, the salmon, the elderberries are a result of the relationships and stewardship of these peoples and their ancestors. I acknowledge my responsibility and commitment to honor their legacy and lifeways by caring for the earth, the life, and committing to resistance and repair of the injustice of current and historical harms. As an occupier I pay Yunakin Land tax (*<https://www.ramaytush.com/donate.html>*) and support however I can, the rematriation of ancestral homelands, the removal of colonizer statues, and the restoration of salmon habitat. I humbly acknowledge that these efforts are inadequate but necessary and quite likely necessary for humanity to survive.*
  + *Recent research demonstrates that while the world's 370 million indigenous peoples make up less than five percent of the total human population, they manage or hold tenure over 25 percent of the world's land surface and support about 80 percent of the global biodiversity. Our future together may depend on not only how much we can acknowledge historical harm but reconnecting to wisdom traditions and being in solidarity with the wisdom keepers.*

#### Compost/Compose (10 minutes)

**Introduce activity (3 minutes)**

* If relevant, acknowledge ways trust has been broken between institutional stakeholders and communities in relation to land mapping, ownership, and management.

**Independent Journaling (3 minutes)**

* Share journaling prompt.
  + *In the context of distrust/mistrust, what kind of relationships can we compose between us?*
* Invite participants to take a few minutes to journal.

**Pair Share (4 minutes)**

#### Capacity: Community Ecosystem Framing (80 minutes)

**Presentation on Community Ecosystem Framing (12 minutes)**

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1HncW784IDb15RxyijLRn_sDIDOv7Rr396XmigdpJHyk/edit#slide=id.gd0b066cf45_0_11) **that you can copy, modify, and use!**

* *Where we are in VAST*
* *Reminder: A system is interconnected parts in dynamic relations*
* *Creating an ecosystem assessment = needs, priorities, assets, relationships (slide 7)*
* *In VISION, we took inventory of priorities + relationships*
* *For this session, Assessment 1, we will dive into how to be in power-with relationships inside and outside our organization.*

**Part 1: Foundations Presentation (15 minutes)**

* Provide a 1-2 sentence description of Permaculture.
  + *A set of ways or a design system to meet all human needs abundantly without taking away from nature, but in fact meeting those needs in ways that enhance, restore and repair the environment within which we live, and that surrounds us.*
* Present Permaculture Principles.
  + *How leaders are already using principles, already designing solutions*
  + *We would usually share principles in a PDC by….*
  + *Social Permaculture with* [examples](https://docs.google.com/document/d/1uq18Jj5IQfLuoD7NMlsSve9z6OCnnd3zS5zB5CBinVo/edit#heading=h.gjdgxs)*: Edge effect - Value the marginal; Diversity; Stacking Functions, integrate rather than segregate - social interaction - like a block party. We celebrate while we learn, connect, and build.*

|  |
| --- |
| ACTIVITY: PRINCIPLES THAT CATALYZE COMMUNITY |
| **Introduction (4 minutes)**   * Share prompt.   + *Think of something that’s working well in your community. For example, social lending circles, multigenerational living, or block parties. What are 1-2 principles that make it culturally fitting? They don’t have to be Permaculture ones. Think about what’s at the core of this practice or tradition that makes it stand the test of time?*   **Reflection (5 minutes)**   * Time to reflect (play music). Invite everyone to type the principles in the chat when they have them. Reflect and engage with the chat inputs. Take 1-2 comments if time allows.   **Transition (3 minutes)**   * Share questions to consider.   + *Imagine doing this activity with members of your community. What would they say? How might you “capture and store” these types of principles from your community? Show the butterfly from EPA(slide 10). These principles are your community’s unique assets. When you consider solutions, especially ones that might be new, put them through the filter of your community’s design principles. How might you “harvest” this collective wisdom throughout phase 1 and onward?* |

**Part 2: Group Dynamics Presentation (30 minutes)**

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1HncW784IDb15RxyijLRn_sDIDOv7Rr396XmigdpJHyk/edit#slide=id.gd0b066cf45_0_16) **that you can copy, modify, and use!**

* Introduction
  + *The crucial role relationships play in our work cannot be overstated. They are one of our greatest assets, and we have to tend to them regularly. In last week’s learning group, you produced a relationship map. The work your organization does happens inside that ecosystem of relationships. Your work is affected by that ecosystem, and your work affects the ecosystem. To build power, we must grow/nourish the soil of that ecosystem.*
* Diana Leafe Christian´s work on intentional communities
  + *Shared vision*
  + *Written and regularly revised agreements*
  + *Trainings on how to communicate with the emphasis on making decisions*
* Group Structures and Governance Models
  + *Key Takeaways: 1) It’s never too early to think about decision making. 2) There are different types of group structures, and each has its set of benefits. 3) Power can exist outside of the formally articulated group structures.*
* River Ride
  + *Structures (slide 15, 16).*
  + *MOCHA for collaboratives (slide 17).*
  + *Consensus vs Consent-based decision-making (slide 18).*
  + *Creative Tension (Ex: Okanagan method, slide 19).*
  + *What the PACE team does slides 20-27.*
* Repeat Key Takeaways
  + *This was a wild river ride (photo). We want to give you a minute to integrate.*

**Optional Journaling (5 minutes)**

* Provide journaling prompt.
  + *What governance processes are working well? What might you reconsider as a group? Who has the relationship magic? Who can help repair when relations get bumpy?*

**Pair Share (6 minutes)**

* Offer questions for consideration.
  + *What’s resonating with you? What questions are coming up?*

#### Close (10 minutes)

**Summary and HomeFun (8 minutes)**

* Quickly go over a summary of the session using the slides.
  + *Share roadmap slide*
* Review HomeFun (assignment to be done before next session or in learning groups).
  + *In order to continue our conversation about decision-making as a team/collaborative/group, consider what patterns surface when you think about power, responsibility, access to decisions, transparency, and so on. What governance model and decision protocols would ensure the success of this group?*
* Ask for volunteers for the next session.
  + *Role 1 (check-in):*
  + *Role 2 (check-out):*
  + *Role 3:*
* Announcements and updates

**Check Out (2 minutes)**

* Share check out prompt in Chat, Mentimeter, GoogleJamboard sticky notes, or go around the Zoom Room.
  + *1 breath share on what´s alive for you right now.*

## ASSESSMENT I LEARNING GROUP SESSION

### KEY SESSION INFORMATION

**Key Theme/Topic:** How VAST and CNA help visions become reality

**Estimated Time Needed:** 1 hour

**Materials Needed:**

* Presentation Slides (e.g., PowerPoint or Google Slides)

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1HncW784IDb15RxyijLRn_sDIDOv7Rr396XmigdpJHyk/edit#slide=id.g79d072c909_0_851) **that you can copy, modify, and use!**

* Group Agreements

**→ Here are the** [PACE Group Agreements](https://docs.google.com/drawings/d/1ux7mChnEne7-9yD5EZjTQ7xmqIeWOi__XSqGbIchgMw/edit?usp=sharing) **as an example.**

**Session Roles for Facilitators:**

**→ Update and assign roles based on your final session agenda and format.**

| **ROLE** | **ASSIGNED TEAM MEMBER** |
| --- | --- |
| Facilitator(s) |  |
| Notetaker(s) |  |
| Jamboard Lead |  |

### FACILITATOR AGENDA

#### Convene (10 minutes)

**Agenda (2 minutes)**

* Review session agenda.

**Group Grounding (3 minutes)**

* Reiterate (Group) agreements.

**Feedback of Assessment I (5 minutes)**

* Reflect on how things are going using the table below.
  + *We want to start this session by reflecting on how things are going. We’ll use a Jamboard to discuss what we should start doing, stop doing, and continue doing. We’ll open it up for you to populate the Jamboard.*
  + *For internal notetakers. Keep the tagging categories in mind (Facilitation, Content, Tech + Tools, Other). Examples inserted from PACE Project Team.*

**→ Here is an example of PACE's feedback tables in the notes documents to capture participant feedback in an organized way with predefined categories.**

|  | **START** (try this) | **STOP** (don’t do) | **CONTINUE** (keep) |
| --- | --- | --- | --- |
| Facilitation (process) |  |  |  |
| Content |  |  |  |
| Virtual (tech+tools) |  |  |  |
| Other |  |  |  |

#### Connect (15 minutes)

**Buddy Breakouts (3 minutes each)**

* Icebreaker prompt
  + *Something you have in common that's not visible.*

#### Capacity (30 minutes)

**Review VAST Model and Other**

**Review Diamond model**

**Review Example projects**

#### Close (5 minutes)

**Check out (facilitators choice)**

## ASSESSMENT II FULL COHORT SESSION

### KEY SESSION INFORMATION

**Key Theme/Topic:** Data Equity, Data Tools

**Estimated Time Needed:** 2 hours

**Materials Needed:**

* Presentation Slides (e.g., PowerPoint or Google Slides)

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1HncW784IDb15RxyijLRn_sDIDOv7Rr396XmigdpJHyk/edit#slide=id.gd23050a3dc_3_9) **that you can copy, modify, and use!**

**Session Roles for Facilitators:**

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| Vibe Checker (keeps tabs on group agreements and energy levels) |  |
| Music |  |
| Technology Lead - Recording and Breakout Groups |  |
| Notetaker(s) |  |

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### FACILITATOR AGENDA

#### Convene (7 minutes)

**Welcome (3 minutes)**

* Set a welcoming tone with music and greetings.
* Share ‘as you arrive’ prompt verbally and in chat.
* Share some words of welcome.

**Housekeeping (2 minutes)**

* Review group agreements and reminders.
  + *Reminders of group agreements and Zoom etiquette, self-care, etc.*

**→ Here are the** [PACE Group Agreements](https://docs.google.com/drawings/d/1ux7mChnEne7-9yD5EZjTQ7xmqIeWOi__XSqGbIchgMw/edit?usp=sharing) **as an example.**

* Provide a brief overview of the session agenda.

#### Connection (10 minutes)

**Land Acknowledgement**

* Invite one participant to provide a land acknowledgment.

**→ Rather than asking participants to provide a brief land acknowledgment as part of their introduction, we instead invited one participant to give an extended land acknowledgment for each full cohort session.**

* + *Participant shares their location, the people who stewarded it prior to colonization, their current struggles, and one earth-based practice they used/use.*

#### Compost/Compose (10 minutes)

**Making Equity Real Applied**

* Step #2 and #3 (procedures and implementation): Data Equity
  + *Frame this section as “Composing a better relationship between communities and data collection and sharing.”*
  + *We can’t talk about assessment without talking about responsibilities as a storyteller/data collector: Who gets to collect data? How is that data collected? How to investigate who owns or sources the data? How to make sure others benefit from the data? (mention ARC’s principles and protocols)*
  + *There are also issues with using existing data-based tools: How to learn the tools and teach others? How can tools be used to make decisions about funding, programs, and policy?*
  + *Want to emphasize that data can be used in positive ways and need ways of telling our stories. Data knowledge empowers in community building*
  + *Also have a critical eye to data. Data doesn’t always tell the whole story. Depending on the context, don’t want to deepen (or necessarily emphasize) harmful stories.*
  + *Say that these tools should be ever-evolving and reflect evolving community needs.*
  + *Plug for the CNA - Climate Equity Analysis section: a chance to bring more nuance, groundtruth the data from the tools.*
* Just in the chat, ask for thoughts about past experiences for collecting data.

#### Capacity (18 minutes)

**Introduce speakers/presenters (3 minutes)**

* Cal-Adapt
* Healthy Places Index
* CalEnviroScreen 4.0 (draft)

**Overview of tools (15 minutes)**

**→ Here is a** [sample slide deck](https://docs.google.com/presentation/d/1HncW784IDb15RxyijLRn_sDIDOv7Rr396XmigdpJHyk/edit#slide=id.gc4bd7a1c9c_0_150) **from Lucy Andrews, Cal-Adapt, Helen Dowling, and Bill Sadler, Healthy Places Index and Coral Abbot, CalEnviroScreen 4.0 (draft)**

* For each tool respond to the following questions: Why the tool was created (the impetus, and who championed its creation); what kind of information can be accessed with the tool; how people are using it out there in the world today.

#### Capacity: Scavenger Hunt Demo (70 minutes)

**Introduce scavenger hunt (10 minutes)**

* The scavenger hunt consists of rotating presenters with participants staying in place.
  + *Let folks know we’ll be doing 20-min scavenger hunt demos in three breakout groups, the speakers will rotate, but the PACE cohort members will not. We’ll come back to the main room for quick stretch breaks, and take a 3-min break after the 2nd breakout group.*
  + *Rotation Schedule*

|  | **Rotation #1** | **Rotation #2** | **Rotation #3** |
| --- | --- | --- | --- |
| Cal-Adapt | #1-Low experience | #2- Mid experience | #3- High experience |
| Healthy Places Index | #2-Mid experience | #3-High experience | #1-Low experience |
| CalEnviroScreen | #3-High experience | #1-Low experience | #2- Mid experience |

**Scavenger Hunt Demo (20 minute rotations)**

* Agenda for each rotation
  + *Give a 5-min overview of the type of metrics and indicators available on the tool.*
  + *Let cohort members know you’ll be going through a demo of two types of indicators.*
  + *There are two options to interact:* ***Option A:*** *Follow along with the presenter’s demo and be an active listener (e.g. take notes and ask questions).* ***Option B:*** *Have them open the tool on another browser and follow along with their individual addresses \*Have the co-moderator drop a link to the tool in the chat\**
  + *Indicators being showcased: Extreme heat days and length of a dry spell (Cal-Adapt), Tree canopy coverage and supermarket access (HPI), Air pollution burden - PM 2.5 and Diesel (CalEnviroScreen)*
  + *Answer questions that come up and explain how to interpret the outputs*

#### Close (5 minutes)

**Summary (3 minutes)**

* Quickly go over a summary of the session using the slides.
  + *Share roadmap slide*
* Ask for volunteers for the next session.
  + *Role 1 (check-in):*
  + *Role 2 (check-out):*
  + *Role 3:*
* Announcements and updates.

**Check Out (2 minutes)**

* Share check out prompt in Chat, Mentimeter, GoogleJamboard sticky notes, or go around the Zoom Room.
  + *Who do we need to be in conversation with around data equity and decision-making?*

## ASSESSMENT II LEARNING GROUP SESSION

### KEY SESSION INFORMATION

**Key Theme/Topic:** The Power of Stories: Name It, Frame It, Claim It

**Estimated Time Needed:** 1 hour

**Materials Needed:**

* Presentation Slides (e.g., PowerPoint or Google Slides)

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1HncW784IDb15RxyijLRn_sDIDOv7Rr396XmigdpJHyk/edit#slide=id.gd23050a3dc_3_59) **that you can copy, modify, and use!**

* Group Agreements

**→ Here are the** [PACE Group Agreements](https://docs.google.com/drawings/d/1ux7mChnEne7-9yD5EZjTQ7xmqIeWOi__XSqGbIchgMw/edit?usp=sharing) **as an example.**

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| Facilitator(s) |  |
| Notetaker(s) |  |
| Jamboard Lead |  |

### FACILITATOR AGENDA

#### Convene (5 minutes)

**Agenda (2 minutes)**

* Review session agenda.

**Group Grounding (3 minutes)**

* Reiterate (Group) agreements.

#### Connect (10 minutes)

**Power of collective storytelling**

* **Name it**: If you want to change a system, start by renaming it. You can name your project what fits with your culture, your community, your dreams. It doesn’t have to be called \_\_\_ Region Climate Adaptation Plan. Giving something a name is an opportunity to share a paradigm, to birth something into being that hasn’t been, to honor something or someone from the past. Example, electoral autocracy, nonprofit industrial complex, permaculture, Sankofa Community Project, Half the Sky,...!
* **Frame it**: You set the boundaries and the highlights. That can include geographic boundaries, what’s important and why, who benefits, and who is externalized. Example, San Francisquito Creek flood zone is a watershed level issue that spans the boundaries of multiple cities and counties. You decide if the bounds of your work are defined by the waterways, a habitat, sacred sites, an identity, a generation. Solutions will match the frames of the problems. Answers will rise and fall to the questions they meet. When we ask not only, “What are the problems”, but “How did we get here?” we change the frame.
* **Claim i**t: It’s your stories, your data. Sovereignty starts at storytelling. It’s your community’s decisions to share or not, and what and how to share, how to be represented, what you know is valid through lived experiences. The oral histories, insights from farmers and fishers, the experience of youth who take the bus every day...those ways of knowing are valid forms of data. Epistemic violence, which is invalidating and denigrating different ways of knowing, is a barrier to accessing resources. We have to shift that pattern even as we use the existing tools.
* By naming, framing, and claiming together as a community, you build power and trust. You will have achieved an important goal even before you turn in a grant application or break ground. That’s the power of collective storytelling. That’s why this CNA is process iterative and participatory. **You’re not just creating a product, you are building power.**

#### Capacity (25 minutes)

|  |
| --- |
| ACTIVITY: STORYTELLING IN THE CNA |
| **CNA examples and discussion**   * The pieces of the CNA are designed to help you tell your collective story. All the pieces may not fit with your needs and you may need other pieces to paint the full picture. We wanted to make space for some peer sharing around the thought process to decide how to use what we’ve shared.   **Reflection/Journaling**   * Journaling prompt   + *What additional pieces or methods might help you tell the story better, more completely, more holistically?* |

#### Close (5 minutes)

**Check out (facilitators choice)**