

PUBLIC GOOD



PUBLIC GOOD

Serving and leading in your community
A guide for young professionals

USING PUBLIC GOOD

You might be joining a community council, helping a nonprofit committee or taking on a neighborhood project. Before you offer a solution, find out what people are already doing and where they want help. Use these pages to understand your role, take part in decisions and finish work that the people receiving it can use.

Bring what you know from work, caregiving, local organizing or everyday life. Listen to the people who know the community and the organization. You can contribute while you're still learning its history and procedures.

Choose one responsibility

Choose something small enough to move forward during the next month. Read the pages that fit, try your own approach before looking at the example response and ask the person who'll use the result what's still missing. Speak, type, dictate or use another response format you've agreed on.

Scope

This guide supports preparation and participation. Advisory councils, governing boards, and public bodies carry different authority and obligations. Confirm applicable law, governing documents, host policies, required training, and qualified advice before acting. This is not legal advice or a substitute for role-specific induction.

The people, organizations, responses, budgets and outcomes in the cases are fictional. Use the tools to try an approach and adapt it to your setting. They are not evidence that the program's effectiveness has been evaluated.

Use the editable response fields, or write in the space provided. If you need more room by hand, copy the prompts onto a separate sheet so you can give a complete answer.

Ask what people have already tried and where they want help. Keeping something useful running or supporting an existing organizer can be a worthwhile contribution. Joining a group should not mean supplying endless unpaid time or sharing private stories.

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CONTENTS AND WAYS TO USE THIS GUIDE

Find the topic that matches the responsibility in front of you. Each main section starts with a question and a short preview, followed by advice, examples and something to try. Use the part that helps with your next decision.

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Reading for a real task

Start with an example that fits, try your own approach and compare the reasoning. Keep the tool that helps and adapt it with the person responsible for the actual decision. Return to the explanation whenever a question or unfamiliar term needs more time.

YOUR FIRST MONTH

If you're new to the role, the reading order gives you a useful start. If a deadline is close, go to that responsibility first, then come back to the pages on authority so you know what you can decide.

A first month that respects capacity

Week one

Ask the liaison about purpose, time, authority, training, costs, and a concern-reporting contact. Confirm what you can influence before inviting others to contribute.

Week two

Prepare one meeting contribution. Read the paper for its decision, evidence, and missing information. Make a concise contribution and accept only a task you can complete with the available support.

Week three

Help with a small listening activity or project. Use approved channels and an agreed purpose. Protect personal information and tell people how their input will be used.

YOUR FIRST MONTH

Week four

Check what happened to the advice or deliverable. Ask the recipient what was useful, correct any inaccurate claims, and agree the next owner or review date. A clear response closes the loop better than a ceremonial thank-you.

A route when something feels wrong

If expectations change, ask the host to restate the role and the support available. Take a safety concern, misconduct allegation or sensitive complaint through the established safeguarding, reporting or emergency route. Being new to a group does not make you responsible for investigating people, mediating abuse or making a legal determination.

Confirm the practical support you need without disclosing private reasons for limited availability.

FIND A FIRST ROUTE INTO PUBLIC WORK

You can be interested in a local issue before you have a committee invitation or a role title. Start by finding who is already working on it and what kind of contribution they are inviting. A practical task, an advisory role and a published opportunity to comment on a decision each ask something different of you. Choose the route that fits both the need and the time you can offer.

Look for a real opening

Use the organization's current public information to find its purpose, contact route and any stated participation requirements. Read what is being requested before proposing a new project. If the information is unclear, ask the named contact. A useful first message can be short: 'I'm interested in the work on this issue. Is there a current task or participation route for someone who can offer this amount of time, and what should I read first?'

For a volunteer task, ask about the output, supervision or support, training and finish point. For an advisory or governing invitation, use the role conversation and the relevant induction. For a public decision, check the published contribution route and deadline. Attending, submitting a comment, becoming a member and taking on a formal role are different steps. Follow the actual arrangements for the one you are considering.

Make the first conversation useful

Explain the connection you actually have to the issue, without claiming to speak for other residents, a profession or an employer. Ask what people have already tried and what remains open. You may discover that keeping an existing resource current would help more than starting another one. You may also discover that the opportunity needs more time or specialist experience than you can offer.

FIND A FIRST ROUTE INTO PUBLIC WORK

The issue I want to understand and the organization or decision process involved

The current invitation or public information I checked, including its date

The specific route I am considering and what it asks me to do

My available time, one useful contribution and the support I would need

The question I will send through the official contact route

The next decision I will make after receiving the answer

FIND A FIRST ROUTE INTO PUBLIC WORK

Keep unanswered items marked as questions. If there is no reply, check whether the organization publishes a follow-up route or an expected response time. A public event, another current task or a later intake may be a better fit. Avoid turning silence into an invitation, sending private information repeatedly or announcing yourself as a representative.

Already in a role? Read your group's invitation from the outside. Can someone find a real task, understand the commitment and reach a person who has agreed to respond? Improving those details can widen the route into the work without promising authority, membership or influence the group cannot provide.

JOINING WITH A CLEAR ROLE

JOINING

What are you being asked to take responsibility for?

An invitation to a council or board may sound clear while leaving the practical details open. Are you being asked to advise, help deliver a project, raise funds or join a governing body? Those roles involve different responsibilities.

Start with the purpose, the work expected of you and the authority behind it. The venue-agreement example shows why a deadline is a reason to ask a clear question about responsibility. Use that conversation to find the support you'll need too.

Before you start

Bring an invitation or role description, or use the fictional committee. Ask the host to clarify what's missing. A governing or public-body role also needs its own induction and qualified guidance.



Photograph: see image credits.

What to work on

- 1 Distinguish advice, project delivery, governance, and public-body work
- 2 Check time, costs, training, and available support
- 3 Clarify a request before accepting an obligation

KNOW THE ROLE YOU ARE JOINING

Ask what the invitation means in practice. A “young-professional board” might raise funds, advise staff, deliver volunteer projects or carry governing responsibilities. Read the purpose and role documents before accepting obligations on the strength of the name.

Distinguish the work from the authority

Advisory work

You may offer perspective, review proposals, or recommend action. Ask who receives the advice, who makes the decision, and how members learn what happened.

Delegated project work

You may carry out a defined task within an approved scope. Confirm the budget, approvals, supervision, and limits on external promises. Responsibility for delivery does not automatically include signing authority.

Governing work

A genuine governing-board role requires its own orientation, governing documents, and explanation of duties. Obtain qualified guidance about the responsibilities applicable to that organization and jurisdiction.

KNOW THE ROLE YOU ARE JOINING

Public-body work

A public committee or board may have rules about meetings, records, participation, conflicts, and communication. Ask the clerk, liaison, or appropriate legal contact which rules apply before using informal channels for official business.

Ask what the role will cost you

Confirm the term, meeting frequency, preparation, fundraising or personal-giving expectations, travel, and other expenses. Ask whether reasonable costs are reimbursed, how to seek approval, and when payment occurs. Clarify whether additional work is optional. Do not assume “volunteer” means unlimited availability or personal spending.

Make the support explicit

Request a named liaison, materials in time to prepare, explanations of recurring terms, required training, and a route for confidential questions. Ask how to challenge a decision process or raise a concern if the chair is involved. A host should not rely on newcomers to discover these arrangements through mistakes.

Reconfirm when the request changes

A role conversation is not permanent permission for every future task. Revisit it when you are asked to spend, sign, speak publicly, collect information, supervise others, or commit more time. State the gap plainly: “I can prepare the recommendation; I need to confirm who can authorize this commitment.”

BoardSource distinguishes governing boards from advisory bodies. Use that distinction to ask better questions, while relying on your own organization’s documents and qualified advice for the actual answer.

THE VENUE AGREEMENT ON FRIDAY

Fictional case. Leila joins the Riverside Arts Advisory Circle, which advises staff on community events. The chair asks her to sign a venue agreement by Friday to save the group's preferred date. The agreement includes a \$500 deposit and a cancellation charge. Leila has received a welcome email but no delegation or finance policy.

Separate urgency from authorization

The venue deadline is real within the case, but the chair's request does not show that Leila can sign. A welcome email explains that she belongs to the group; it does not define contracting authority. The deposit and cancellation terms make the gap consequential.

A response that keeps the booking moving

"I can gather the venue details and prepare a recommendation today. Before anyone accepts, could you send the delegation and identify the person authorized to approve the cost and sign the agreement? I'll ask the venue whether it can hold the date until that review is complete."

Leila requests the host's current role description and procurement route. She does not forward confidential organizational documents to the venue. She records the deadline, full cost, cancellation condition, and questions in the approved workspace so the staff liaison can act.

THE VENUE AGREEMENT ON FRIDAY

When the role is clarified

The liaison supplies a written remit: the circle recommends programming; the operations manager approves venue commitments; a designated staff officer signs. Leila prepares a short comparison of the preferred venue and a feasible alternative. The operations manager decides whether either can be accepted before the deadline.

If the chair pushes again

“The remit reserves approval and signing to staff. I can finish the comparison and contact the liaison now, but I can’t accept the agreement on behalf of the organization.” The response is firm about the actual boundary and specific about useful work still available.

What belongs in the record

Record the verified role, current decision-maker, link to the remit, deadline, and next action. Keep the agreement in the approved location. Do not turn the chair’s pressure into an informal accusation in a public document. If it becomes a concern about conduct or repeated unauthorized requests, use the host’s appropriate reporting route.

Leila gives the authorized staff member something they can act on while keeping her own role clear. The next exercise asks you to resolve an equally unclear invitation.

HAVE THE ROLE CONVERSATION

Clarify the committee invitation

Fictional practice. A neighborhood committee invites you to be its “community voice.” The invitation does not explain whether you vote, how advice is used, or how much time is expected. Your first meeting includes a request to approve a supplier. Draft three questions before agreeing to that decision.

Questions to ask the host

“What authority does this committee have over supplier selection, and where is it written?” “Am I being asked to recommend an option or participate in a formal decision?” “What conflict, confidentiality, and approval procedures do members need to follow?”

The title does not make you a representative of every resident. Ask whom the host expects you to listen to, how they will support that work, and what language you should use to describe the limits of your perspective.

role conversation sheet

The group, its purpose, and the kind of role I am joining

What the host expects me to contribute

HAVE THE ROLE CONVERSATION

Decisions I may make and the document that confirms this

Decisions that belong to staff, the board, or another body

The term, preparation time, expenses, and any giving expectations

Training, access arrangements, and my named contact

Where to raise a concern or check an unclear request

How I will hear the response to advice and review the role

HAVE THE ROLE CONVERSATION

Feedback

A usable sheet answers the questions that affect real participation. Ask the liaison to correct it and confirm the current version. Do not invent certainty where a document is missing. If a governing or public-body role is involved, add the required induction and specialist guidance rather than assuming this worksheet is sufficient.

Replay

The host says you are expected to raise \$1,000 personally during the term. Ask whether this is mandatory, how it was communicated, what alternatives exist, and whether the role can fit your circumstances. You may decline or renegotiate before committing; you do not owe a private financial explanation.

KEEP YOUR CIVIC ROLE SEPARATE FROM YOUR EMPLOYER'S NAME

A skill you use at work may help a community group. The employer's name, equipment, data and authority do not automatically come with it. Before accepting a request, explain whether you are contributing personally, through an employer-supported arrangement or under some other confirmed role. Check the relevant host and employer requirements when those roles overlap.

A fictional introduction that promises too much

Leila works for a design company and volunteers personally with a neighborhood association. The association asks her to review the clarity of a public event notice. She agrees to comment on its wording in her own time. The chair drafts a caption: 'Our design partner, Leila's employer, is supporting the event.' The company has not agreed to a partnership, and Leila has no authority to make that commitment.

Leila asks for the caption to be corrected before release: 'I'm helping as an individual volunteer. My employer has not agreed to sponsor or partner on this event. Please describe my contribution as a wording review, subject to the association's own approval.' She also confirms whether she wants personal credit at all. The chair remains responsible for the association's release process.

The chair then asks for the company's mailing list and a copy of its design software login. Those were never part of Leila's offer. She refers any request for company resources to its authorized contact and continues only with the approved material she can properly use. Being helpful does not require moving restricted information into a volunteer project or sharing someone else's account.

KEEP YOUR CIVIC ROLE SEPARATE FROM YOUR EMPLOYER'S NAME

Clarify the contribution before you begin

The capacity in which I am participating and the contribution I have actually accepted

Who may use my name, job title or employer affiliation, and what wording is confirmed

Which information, tools or resources I am authorized to use for this task

Any overlap or conflict that needs the relevant host or employer process

The person who approves the public result and the point at which my task ends

KEEP YOUR CIVIC ROLE SEPARATE FROM YOUR EMPLOYER'S NAME

For Leila, the record can stay simple: personal volunteer; wording review only; no employer endorsement or resources promised; association approves publication. If the employer later considers formal support, that becomes a separate conversation through its own authorized route. Leave that possibility pending rather than describing it as part of the current arrangement.

If the inaccurate description has already been shared

Contact the person responsible for the publication, identify the exact wording and request a factual correction through the appropriate process. Explain the actual role without speculating about anyone's motives. If the matter raises a contractual, employment or reputational question you cannot resolve, seek the relevant qualified support. Keep the record of what was requested and corrected under the applicable arrangements.

You can use this check even without a formal job title. A campus affiliation, professional membership or previous role can also be mistaken for current authority. Say what you bring, what you have agreed to do and which decisions remain with someone else. That clarity helps the group use your contribution accurately.

TAKING PART IN COMMUNITY DECISIONS

TAKING PART IN COMMUNITY

What could you add to the next discussion?

You can ask a useful question while you're still the newest person in the room. A meeting paper may need a clearer decision, a fairer comparison or an explanation of whose experience is missing.

With your role clearer, prepare a contribution that fits it. The opening-hours example uses simple attendance figures to show how a careful question can help a decision without pretending to settle it.

Before you start

Choose an agenda item, prepare a brief question and a realistic suggestion, and try saying them in about thirty seconds.



Photograph: see image credits.

What to work on

- 1** Read the paper for the decision and supporting evidence
- 2** Ask about the information that could change the choice
- 3** Accept a task with a clear limit and needed support

CONTRIBUTE TO A COMMUNITY MEETING

Start with the decision on the agenda. Read enough to understand what's proposed, why and what the group has authority to do. Then choose a question or observation that will help the discussion. You can do this while you're still learning how the organization works.

Read a paper in four passes

Decision

Find the precise recommendation. Is the group receiving information, giving advice, choosing an option, or authorizing an obligation? If the paper does not say, ask before discussing the merits.

Evidence

Identify the facts, their sources, and their limits. Notice whether the paper measures current users while the proposal affects people who cannot access the service.

Options

Look for alternatives, including a smaller trial, maintaining the current arrangement, or postponing until a necessary fact is known. Ask whether each option is feasible with the available resources.

CONTRIBUTE TO A COMMUNITY MEETING

Follow-through

Find the owner, date, approval route, and review point. A recommendation without a delivery path may be an invitation to agree to more than the group can carry.

Prepare a short contribution

Name the issue, connect it to one piece of evidence or experience, and ask a clear question or propose a specific next step. Say, “The paper counts current morning attendance, but the change affects people who work mornings. Could we hear from those residents before removing the evening option?” Keep the distinction between observation and inference audible.

Work across experience levels

Long-serving members may know why a previous attempt failed; new members may see an exclusion others have accepted as normal. Ask for the history without treating it as a permanent veto. Do not ask one participant to speak for an entire age group or community. Invite the relevant experience and give the person room to decline.

Ask for the time or explanation you need

If discussion moves too quickly, ask the chair to restate the decision. If a term is unfamiliar, request a brief explanation. If people repeat positions, summarize the point of agreement and the unresolved question. When taking a task, read back the output, reviewer, deadline, and support you need.

Personal notes help you prepare, but they are not official minutes. Confirm which record captures the group’s decision and how corrections can be made.

WHEN SHOULD THE DROP IN OPEN

Fictional case. A community center can staff two weekly drop-in sessions. Last month's four morning sessions recorded 36 visits; four evening sessions recorded 24 visits. Staff propose replacing evenings with another morning slot. A long-serving volunteer favors mornings. Another member says evening sessions are essential for working residents. The notes do not identify unique visitors or people unable to attend.

Read the numbers precisely

The records show nine visits per morning session and six per evening session in this small period. They do not prove how many distinct residents used either time, how much unmet demand exists, or why visits differ. Attendance among current users cannot describe everyone excluded by current hours.

Prepare a thirty second contribution

"Morning sessions had more recorded visits last month, but these figures count visits rather than unique residents and do not include people who could not attend. Before removing evenings, could we check how the change would affect current evening users and people with daytime commitments? A short review or limited trial may give us a better basis for deciding."

Use the experience in the room

The long-serving volunteer explains that transport was a problem in an earlier evening trial. The member supporting evenings describes recent shift-work changes. The chair records both as relevant information to check, rather than forcing the group to choose which person is more credible based on age or tenure.

WHEN SHOULD THE DROP IN OPEN

Agree the next decision

The center manager confirms that the group may recommend hours but cannot change the staff schedule. Members agree to prepare a recommendation in two weeks. Staff will provide comparable visit records if available and use approved methods to ask current users about alternatives. A member offers to review the resulting summary, not independently survey service users without a plan.

Read back the commitment

"I'll review the nonidentifying summary by Thursday, focusing on what the information supports and what remains unknown. I need the summary by Tuesday. The manager will decide whether a trial is feasible after the committee makes its recommendation."

The question improves the basis for the decision. The next exercise asks you to prepare a similarly focused contribution on registration.

PREPARE ONE USEFUL CONTRIBUTION

Question the registration proposal

Fictional practice. The meeting paper says “Approve online registration from next month.” It lists lower administration time but no information about telephone users. You have two minutes before the item is discussed. Write one question and a realistic suggestion.

A contribution to the discussion

“What will people who currently register by telephone use if online registration is difficult for them? Could we retain a supported telephone route during a trial and review access as well as staff time before deciding on a permanent change?”

The question connects the missing information to the proposed action. It does not assume all telephone users oppose technology, and it does not promise a service the committee cannot fund. The next check is who can approve the trial and its support costs.

meeting preparation card

The agenda item and exact decision or advice requested

The relevant evidence and its main limitation

PREPARE ONE USEFUL CONTRIBUTION

People affected whose experience may be missing

One question I plan to ask

A realistic suggestion within my role

A task I could take on and the support I would need

Language for common moments

To enter a fast discussion

“Could I check one assumption before we decide?”

To disagree

“I read that evidence differently because it excludes people who could not attend. Could we separate that uncertainty from the cost question?”

PREPARE ONE USEFUL CONTRIBUTION

To protect capacity

"I can review the draft on Friday. I can't organize the whole consultation this month."

To close

"Before we move on, who owns the next step, and when will this return for a decision?"

Review and try a changed situation

Check whether your contribution is tied to the actual decision, grounded in available evidence, and short enough to be understood. Now the chair explains that the committee can only advise. Address your proposed trial to the service manager: "Could we recommend retaining a supported telephone route during the trial?" Identify who will send the recommendation and how the committee will receive a response.

LISTENING TO THE PEOPLE AFFECTED

LISTENING TO THE PEOPLE

Who is missing from the information you have?

A meeting paper may explain how a service works for the people already using it. Ask what it leaves out about people who can't use it. Find a way to hear their experience while being clear about the decisions you do and don't control.

Follow that question beyond the meeting room in the online-booking example. Compare what the different listening methods can tell you, keep disagreements visible and let people know what happened to the input they gave.

Before you start

Agree the listening plan with the host before collecting information. Make clear what is open to change and how people will hear the outcome.



Photograph: see image credits.

What to work on

- 1** Connect the invitation to a decision people can influence
- 2** Choose participation routes that fit the people affected
- 3** Keep the response group and evidence limits clear

LISTEN BEYOND YOUR OWN NETWORK

Before you ask people to contribute, tell them what their input can change. If the budget is fixed but the delivery method is open, say so. If your group advises someone else, name the decision-maker and explain how the advice will reach them.

Plan around the people affected

List who uses the service, who tried but could not use it, who delivers it, who may bear costs, and who could be affected by a change. Consider the places and channels people already trust. Ask existing community organizers what previous listening has established before collecting the same stories again.

Choose a proportionate method

A short conversation can reveal an issue; a structured interview can examine it; a survey can gather comparable responses from its respondents; a public meeting can surface discussion. None is automatically representative. Choose the method for the decision and state what it cannot tell you. Use approved privacy and consent arrangements before collecting information.

Ask neutral and usable questions

Try, “How do you currently register?” “What makes that easy or difficult?” and “What would help you use the proposed option?” Avoid forcing a yes to a preferred solution. Offer an appropriate way to decline or leave a question unanswered. Explain who will see the information and avoid collecting details that are unnecessary to the purpose.

LISTEN BEYOND YOUR OWN NETWORK

Keep disagreement visible

Sort responses into supported themes while preserving important differences. A minority view can reveal a serious access barrier even when it is not the most common preference. Counts describe the response set; they do not decide fairness by themselves. Record the reasoning for how trade-offs will be considered.

Report back to the people who contributed

Return a plain-language account of what was heard, what changed, what did not change, and why. Share it through routes people can actually use, not only the channel easiest for the organizers. Invite corrections to factual summaries and explain the next decision point.

EPA participation guidance stresses that the influence you promise people needs to match the real decision process. Community Tool Box offers practical listening methods. Use the listening record to make your purpose, method and evidence limits clear.

NINE ONLINE REPLIES DO NOT SETTLE IT

Fictional case. A neighborhood support group wants to move all booking online. Nine online survey respondents favor the change. Two people who currently use the telephone describe difficulty with online forms. A draft announcement says, “Everyone prefers the new online system.” The online form was shared through the group’s social account, and no other listening route was offered.

Correct the statement before it spreads

“All nine respondents to the online form favored online booking. Two telephone users separately described difficulties with that route. We have not yet heard from many current users, including people who do not follow the social account. The evidence does not support saying everyone prefers the change.”

Avoid a misleading combined percentage

The nine form replies and two conversations used different methods. They are useful evidence, but combining them into an approval percentage would hide how they were collected. Keep the sources visible. Check whether any person appears in both sets before even considering a total count.

Choose the next listening step

The host asks the service coordinator to use its approved contact route to invite telephone users and people who have experienced registration difficulty. The questions focus on how to complete booking, what support would help, and which alternative route is needed. Participants are told the group is considering options, not announcing a completed decision.

NINE ONLINE REPLIES DO NOT SETTLE IT

Make a recommendation that handles the barrier

The group recommends testing online booking while maintaining a staffed telephone option during the trial, subject to the manager confirming resources. The review would examine successful bookings, support requests, incomplete attempts if the system can measure them appropriately, and user feedback. Lower staff processing time alone would not show that the service remained usable.

When more responses disagree

A later listening session includes both enthusiastic users and people who need assistance. The summary retains the disagreement and names the conditions under which each option works. It does not search for a slogan that makes the whole group appear united. The manager's eventual decision explains how access, capacity, and cost were weighed.

The host now has a clearer account of who replied and which access questions remain. Use that distinction in your own listening plan.

BUILD A LISTENING AND EVIDENCE RECORD

Plan a listening activity

Fictional practice. Five people at a Saturday cleanup ask for more weekend volunteer shifts. The project lead wants to announce that residents prefer weekends. The host has no evidence from weekday volunteers or people who wanted to attend but could not. Rewrite the claim and propose the smallest useful next step.

A listening plan to compare

“Five participants at Saturday’s cleanup requested more weekend shifts. We have not checked the preferences of weekday volunteers or people unable to attend. Before changing the schedule, let’s use the host’s approved channels to ask about feasible times and barriers, including a non-digital route where appropriate.”

The next step should be manageable. You do not need to promise a citywide study to improve this decision. Confirm the decision-maker, times still available, and the information that could realistically change the schedule.

listening record

The decision and what participants are being invited to influence

The people affected and how we will reach them

BUILD A LISTENING AND EVIDENCE RECORD

Our neutral questions and the information we do not need

Privacy, consent, storage, and access arrangements agreed with the host

Responses by method, including any overlap or duplicates

Themes, disagreements, and people we did not reach

The claim the information supports and its limits

How we will report back and invite factual corrections

BUILD A LISTENING AND EVIDENCE RECORD

Review and try a changed situation

Ask someone outside your usual network to read the plan. Can they tell what is actually open to influence? Can someone with limited internet access or an inconvenient schedule participate through a realistic route? Have you confused the most available people with all affected people?

Now a participant shares a sensitive personal story. Do not copy it into the record merely because it explains a barrier. Ask what may be shared, minimize detail, and use the host's approved handling procedure. If a safeguarding or other report is required, follow the separate official route.

COMPARING OPTIONS

RESPONSIBLY

COMPARING OPTIONS

What does the decision-maker need to see?

Help the decision-maker compare the options fairly and see what's still uncertain. That may be an incomplete quote, a missing approval or a personal connection that needs to go through the right process.

Build on what you heard by showing how the available information supports your recommendation. The supplier example keeps two issues separate: a family connection and a price that leaves part of the requirement out.

Before you start

Prepare a short decision brief. Ask whether someone could follow your reasoning even if they would choose a different option.



Photograph: see image credits.

What to work on

- 1** Agree the purpose and criteria before favoring an option
- 2** Raise interests and information-handling questions
- 3** Write a recommendation with clear conditions

PREPARE DECISIONS WITH CARE

Put the requested decision and the person who can make it at the top of your paper. Give them what they need to compare realistic options, including costs, conditions, uncertainty and any interests that need to be handled through the organization's process.

Build the comparison around the purpose

Describe the need and the people affected. Set criteria before favoring an option: whether it meets the need, access, full cost, available capacity, timing, reversibility, and any non-negotiable requirement. Explain what each criterion means in this setting. Do not give a numerical score an appearance of objectivity when the weights are simply the author's preferences.

Separate a constraint from a preference

An unavailable qualified reviewer can make an option infeasible. A chair's favorite color is usually a preference. Ask who established each constraint and whether it is current. Where values conflict, describe the trade-off openly rather than letting a spreadsheet conceal it. A smaller trial can be an option when uncertainty is important and the risk can be managed.

Disclose interests through the real process

If you or someone connected to you may benefit from a choice, raise the connection promptly with the designated contact. Ask how it should be recorded and whether you should access papers, join discussion, or vote. Do not decide for yourself that the connection is harmless, and do not assume every connection requires the same response. The applicable process determines what happens next.

PREPARE DECISIONS WITH CARE

Handle information in approved places

Check who may see the paper and what can be shared outside the meeting. Do not paste confidential bids, personal accounts, or restricted documents into an informal group chat or an unapproved tool. If you need help, ask a process question without attaching unnecessary material. Use approved support or request a redacted version when appropriate.

Record the decision and the reason

Keep the chosen option, relevant conditions, authorized decision-maker, material evidence, next owner, and review trigger in the official record. Dissent or unresolved issues should be recorded as the host's procedure requires. A factual decision record is more useful than a statement that everyone was happy.

For governing and public-body decisions, obtain the specific legal and procedural guidance your role requires. This preparation method cannot determine legal duties, procurement compliance, or whether a member must recuse.

THE SUPPLIER YOU KNOW PERSONALLY

Fictional case. A community center advisory group is comparing two printing suppliers. Supplier A quotes \$650 for accessible large-print and standard-print notices delivered on time. Supplier B quotes \$520 for standard print only, with large print and delivery still unpriced. Omar's sibling works for Supplier A. The paper is marked confidential; a colleague asks Omar to send it to an informal chat for a quick opinion.

Deal with the process concern first

Omar tells the designated liaison about the family connection through the approved channel and asks how it should be recorded and what participation is permitted. He does not advocate for Supplier A while waiting or decide independently that the connection is irrelevant.

Protect the paper

He replies to the colleague: "The paper is restricted to the review process, so I won't move it into this chat. Please send any questions through the approved channel. I'm also checking a connection that may affect my participation." He limits personal detail to what the process requires.

Compare like with like

The remaining authorized reviewers identify that the quotes are not equivalent. Supplier B's price excludes required formats and delivery. They ask for a complete quote and confirm the actual access needs, production dates, and budget. They do not score B as cheaper merely because its incomplete number is lower.

THE SUPPLIER YOU KNOW PERSONALLY

Criterion	Supplier A	Supplier B
Quoted price	\$650 complete scope	\$520 partial scope
Required print formats	Included in quote	Large print unpriced
Delivery	Included and on time	Price and date unconfirmed
What to check next	Check quality and approvals	Obtain comparable full quote

A defensible recommendation

The reviewers can recommend waiting for the missing quote if the deadline permits or use the host’s authorized route for a time-sensitive choice. The decision record explains the comparison and unresolved facts. Omar follows the instructions he receives about access and participation.

The family connection and the incomplete quote require separate checks. Resolving one does not answer the other.

WRITE A DECISION BRIEF

Respond to the endorsement request

Fictional practice. A partner asks your committee to endorse an event this evening. You have an attractive flyer, an estimated budget, no confirmation of the venue, and no explanation of what endorsement commits your organization to. Draft the first paragraph of a decision brief.

Opening the decision brief

“The committee is being asked to recommend organizational endorsement of the event. Before a recommendation is ready, the host needs to clarify what endorsement permits or promises, confirm the venue and full costs, and identify who has authority to approve use of the organization’s name. Today’s proposed action is to request those facts by a stated deadline.”

You can respond promptly without approving an undefined obligation. Ask the partner for a short extension and explain the information needed. If the deadline is immovable, the authorized person can decide whether the request must be declined rather than silently treating urgency as permission.

decision brief

The requested decision and the person authorized to make it

WRITE A DECISION BRIEF

The need, the people affected, and supporting evidence

Realistic options, including a smaller trial or no change

Comparison criteria, full costs, and conditions every option must meet

What is uncertain and which information could change the choice

Interests or information-handling questions raised with the right contact

The recommendation, its reasons, and the required conditions

WRITE A DECISION BRIEF

The next owner, decision deadline, and reason to review the choice

Review and try a changed situation

A useful brief lets a reader disagree with the recommendation while understanding the reasoning. If the preferred option appears before the criteria, check whether you selected the criteria to justify a choice already made. If a score is used, explain the weights and test whether a reasonable change would alter the result.

Replay after endorsement is clarified as permission to use the logo plus a promise of ten volunteers. Update the brief: the volunteer commitment now needs a capacity check and authorization. A logo approval alone would not cover it.

WORKING WITH A COMMUNITY PARTNER

WORKING WITH A COMMUNITY

Can the partner use what you are offering?

Your volunteer project can create work for the host too. Staff may need to check facts, review drafts, arrange access or maintain what you make. Include their time in the plan from the start.

Once the proposal is ready to proceed, agree exactly what you'll deliver and who will review it. The late translation request gives you a way to talk about a useful addition when time and qualified support are limited.

Before you start

Use the project agreement for something manageable. Ask the person receiving it to confirm both how it helps and the work they would need to contribute.



Photograph: see image credits.

What to work on

- 1** Agree the recipient, scope, and acceptance criteria
- 2** Plan review capacity and permissions
- 3** Renegotiate changes before promising new work

DELIVER A MANAGEABLE COMMUNITY PROJECT

Ask the people receiving the work what would help and what they can realistically review. Find out what's already been tried. Agree on something the partner wants and can use, including the staff time needed to supply facts, review drafts and keep the result up to date.

Agree a specific result

Replace “transform your outreach” with “prepare two event notices using approved information, ready for staff review on 12 November.” State the audience, format, included work, exclusions, and acceptance criteria. A draft, a published notice, and a tested registration process are different deliverables. Name the person who can accept the result.

Count the partner's work too

Your plan may require staff to provide facts, translate, arrange permissions, recruit participants, or review every revision. Ask whether they have that capacity and build realistic review time into the schedule. Avoid treating community members as an unlimited source of unpaid consultation or personal stories.

Make permissions and quality part of the plan

Clarify who approves public statements, images, data collection, expenditure, and use of names or logos. Identify any task requiring a trained or qualified person. Do not promise a translation, technical review, safety role, or specialized service solely because a volunteer is willing to try it.

DELIVER A MANAGEABLE COMMUNITY PROJECT

Manage a change by describing its effect

When new work appears, explain what it changes: deadline, quality, cost, review burden, or existing scope. Offer feasible options and ask the authorized partner to choose. Do not silently add work, reduce quality, or move a public deadline. Record the agreed change in the same place as the original plan.

Finish with acceptance and a next owner

At delivery, ask the recipient to compare the result with the agreed criteria. Record accepted work, requested revisions, and unresolved items. Hand over editable files and permissions through approved systems. If the work will need maintenance, name who owns that work and when it will be reviewed.

Community Tool Box emphasizes actions, owners, timing, resources, and communication in action planning. The project agreement in this guide adds an explicit recipient, scope boundary, and acceptance conversation for a small volunteer team. It is a practical planning aid, not a legal contract.

THE TRANSLATION REQUESTED ON WEDNESDAY

Fictional case. Four volunteers are preparing two event notices for a community partner. Staff review is due Friday, and publication is Monday. The agreed scope includes plain-language copy and an accessible editable layout in English. On Wednesday, the partner asks for an additional language version. No qualified reviewer is currently available.

Explain the missing review step

The additional language could make the event more accessible, but the team cannot promise a reliable version without a suitable review process. The problem is not that the request is unimportant. It is that the agreed schedule and quality arrangements do not yet support it.

A useful reply

“We can still provide the two agreed drafts for Friday’s review. We do not currently have a qualified reviewer for the additional language version, so we cannot promise that version for Monday. Could you help identify a reviewer, approve a later release for that version, or decide whether to revise the publication plan? We can prepare the source copy and layout to make the next step easier.”

THE TRANSLATION REQUESTED ON WEDNESDAY

Record the options

Option one keeps the original review date and adds a later language version once review is arranged, if the partner confirms that the delay will still leave the intended audience enough time and a usable way to participate. Option two delays all publication when simultaneous release is needed and the date can change. Option three narrows the translated material to essential approved information if a qualified reviewer and enough time are available. The partner checks the effect on participants before choosing and authorizing a plan.

When a reviewer becomes available

On Thursday the partner identifies a qualified reviewer but cannot extend publication. The team confirms what the reviewer can complete and when. It does not assume availability means the entire task now fits. They agree a short essential-information version, a Friday review cutoff, a correction route, and who may approve final publication. If that sequence is not feasible, the limitation remains.

Close the project

The volunteer lead delivers the agreed editable files, records which versions were approved, and flags any text still pending. Staff own publication and subsequent changes. The final learning note says that review capacity should be confirmed earlier when a project is intended for more than one language.

The partner can now choose among realistic publication options. Unreviewed material would pass the quality problem to the people relying on it.

AGREE THE WORK BEFORE STARTING

Renegotiate the welcome page

Fictional practice. A volunteer team offers to create a community welcome page. The host now asks for a searchable directory, weekly updates, and collection of residents' personal contact details. The team has ten hours available and no approved system for handling that data. Write a revised offer.

A revised offer

"With the current time and permissions, we can prepare a static page of approved public service information for your review. A searchable directory and ongoing updates need a separate plan, an agreed owner, and an approved data-handling process. Could we complete the public information page first and ask the responsible staff member to scope the other work?"

The reply preserves a useful deliverable without accepting unbounded maintenance or collecting data because a form is easy to create. The host can decide whether the smaller result still meets a real need.

project agreement

The partner, intended recipient, and purpose

AGREE THE WORK BEFORE STARTING

What we will deliver, for whom, in which format, and how it will be checked

Work included in the project and work outside the agreement

The team lead, partner reviewer, and person who approves the work

Information, permissions, and specialist review needed

Key dates, time for review, and people available

How we will discuss and agree changes or delays

AGREE THE WORK BEFORE STARTING

Who accepts the work, who maintains it, and when our role ends

A brief progress update

“The first notice is ready for review. The second is waiting for the confirmed venue address. If that arrives by Thursday noon, both can meet Friday’s review; otherwise we need to agree a later review or a smaller release. Please confirm which option you prefer.”

Review and try a changed situation

Check that the recipient wants the work, the review is realistic, and each permission has an owner. Now the partner offers two additional volunteers. Reassess their actual skills, time, and supervision. More people do not automatically resolve a missing system, legal requirement, or qualified review.

CLOSING THE WORK WELL

CLOSING THE

What is ready and what still needs an owner?

Sending the file is one step in finishing. Make sure the host can tell which version is approved, what remains open and who will maintain the work after your role ends.

Return to the agreement you made at the start. The induction-guide example helps you separate what you produced, whether it was used and any wider result. Close your responsibility clearly and take a specific lesson into your next role.

Before you start

Ask the recipient to try using your handover. Alongside it, write a short account of your contribution, giving credit to the people who helped and leaving outcomes you haven't measured unclaimed.



Photograph: see image credits.

What to work on

- 1** Match claims to the evidence available
- 2** Transfer current work and unresolved decisions
- 3** Agree when responsibility ends and what you learned

LEAVE USEFUL WORK AND LEARNING BEHIND

Before the project or term ends, review the work with the host. What is ready? What needs attention, and who has agreed to take it on? Use that conversation to check what the work achieved and decide what you want to carry into your next role.

Separate four kinds of evidence

Produced

A draft or tool exists. This establishes completion of that output, not whether anyone used it.

Used

The recipient confirms that the work informed a meeting, process, or service. Record what was used and in what setting rather than assuming use from delivery alone.

Changed

A relevant measure or observed behavior differs after the work. Check whether the comparison is meaningful and what else changed.

Caused

A claim that your work produced an outcome requires stronger evidence than a before-and-after story. Most small volunteer projects cannot establish that causal claim. State the result at the level the evidence supports.

LEAVE USEFUL WORK AND LEARNING BEHIND

Make the handover usable

For each open item, give the current status, next action, owner, date, evidence location, and permission limits. Distinguish an unapproved draft from a current public version. Put sensitive records in the approved system and provide only the access the receiving role requires. Do not include passwords or personal participant information in a general handover.

Agree what ends

Confirm the date your responsibility finishes and who accepts any unfinished work. If the host cannot continue an item, agree whether it pauses, reduces scope, or closes. Do not imply that continued unpaid work is the price of a positive reference. Offer any later help only if you genuinely want to and can define a limit.

Choose one lesson for your next role

Write a future cue and response: “When a meeting asks for approval without a clear proposal, I will ask for the exact decision and authority before discussing options.” This is more usable than “be more confident.” Seek feedback on a behavior you can repeat, such as whether your question clarified a decision.

Give credit to staff, community members, and other volunteers. A strong personal account can be modest in scope and precise in evidence. You do not need to claim that one project transformed a community to explain why the work mattered.

THE GUIDE STAFF ACTUALLY USED

Fictional case. Priya's volunteer term ends Friday. She has revised a volunteer induction guide and sent it to the coordinator. A report draft says, "Our project increased volunteer retention." The available records show that the coordinator received the guide; no retention comparison has been made. Two sections remain unapproved.

Correct the outcome claim

At this point Priya can say she revised and delivered the draft. Delivery does not establish use, and use would not by itself establish improved retention. She changes the report to: "The team prepared a revised induction guide and sent it to the volunteer coordinator for review. Two sections remain pending."

Ask a useful closing question

"Which parts have you used, what still needs changing, and who will maintain the guide after Friday?" This asks for observable information without pressuring the host to endorse a success story.

When stronger evidence arrives

The coordinator replies that two new volunteers used the checklist during induction and identified three unclear steps. Priya can now report use: "I revised the induction checklist with staff input. The coordinator used it with two new volunteers and identified three steps for clarification." Retention remains unmeasured.

THE GUIDE STAFF ACTUALLY USED

Write the handover

“Current file: Induction guide version 3 in the approved volunteer folder. Staff have used the arrival checklist. Safeguarding and expense sections remain unapproved and must not be presented as current policy. Coordinator owns review after Friday. Three wording changes are listed in the comment log. Keep the current published guide active until staff approve a replacement.”

Close without leaving a hidden obligation

Priya and the coordinator agree that her responsibility ends Friday. The coordinator accepts the pending items. Priya offers one optional 20-minute clarification call during the following week, with no ongoing maintenance commitment. If she cannot offer that time, the handover still needs to stand on its own.

Priya can update her account as real use is confirmed. Her handover also makes clear which work staff still need to approve.

CLOSE THE ROLE RESPONSIBLY

Describe a draft still awaiting review

Fictional practice. Your team drafted an event guide, but staff have not reviewed it. Your departure is next week. A teammate wants to write, “We improved the organization’s events.” Prepare a contribution statement and the next-action part of a handover.

An accurate contribution statement

“Our team drafted an event planning guide using the host’s approved information. I wrote the meeting and task-planning sections. Staff review is pending, so we do not yet know which parts will be used.”

Proposed next action

“Ask the staff liaison to confirm who will review the draft, who will take over unfinished work, and a response date before our departure. Record those names and dates once they are agreed. Staff review is still pending, and the current process stays in place unless the host authorizes a change.”

handover and learning record

Work completed and any evidence that it has been used

CLOSE THE ROLE RESPONSIBLY

The current file location, version, and permission limits

Unfinished work, its next action, owner, and date

Who accepts the handover and when my responsibility ends

Access and record-handling steps to confirm with the host

My contribution and other people to credit

The result I can support and the outcome not established

CLOSE THE ROLE RESPONSIBLY

A future situation, the action I will try, and feedback to seek

Review and try a changed situation

Ask the receiving person to find the current file and explain what must happen next. If they cannot, improve the handover before polishing the contribution statement. Keep any portfolio example within the host's permissions and remove confidential content before external sharing.

Replay after staff confirm using two sections and request a revised checklist. Update the evidence of use, then agree whether the revision belongs within your remaining role. A request at departure is still a request; it does not automatically extend your commitment.

FOLLOWING A PUBLIC DECISION

FOLLOWING A PUBLIC

What can people influence now, and what must happen before anything changes?

A public decision may pass through several hands: someone proposes a change, others examine it, an authorized body decides and staff arrange delivery. Wherever you enter that process, start by finding out which stage it has reached. That may be your first useful contribution.

You've already looked at clarifying a role, listening carefully and preparing a decision brief. Now follow the brief through the process. Keep a recommendation separate from approval, and approval separate from something actually happening. Work out what people need to hear when a decision is delayed, changed or conditional.



Photograph: see image credits.

Put this to use

- 1** Read a process packet for decision-makers, dates and dependencies.
- 2** Choose a contribution that fits the current stage and the group's actual authority.

FOLLOWING A PUBLIC DECISION

- 3** Write a status update that separates what happened from what is still expected.
- 4** Keep a response route open for people who contributed, without promising influence that the process does not provide.

Before you start

Start with the fictional Riverbank packet below. For real work, use current official material and a named liaison who can correct your understanding. An organization's title, a prominent supporter or a confident speaker cannot establish authority on their own. Different jurisdictions and organizations assign powers differently.

Riverbank's rules and dates describe a fictional fund, not a real one. The source record keeps track of the passages recovered from the six-page excerpt and the surrounding material newly reconstructed before this voice revision.

MAP THE DECISION RATHER THAN THE INSTITUTION'S REPUTATION

Start with the change people want, then pin down the decision needed next. A request to “improve access” might involve a policy change, an operational adjustment, funding and several implementation tasks. A well-known institution may influence one part of that work without having authority over all of it.

Keep these three questions separate

What arrangement is being considered? Who can decide it? What has to happen before an approved decision can be put into practice? Keeping those questions separate helps you avoid asking an advisory group to promise something that another body controls.

A service manager might be able to update instructions within an existing policy but need approval to change eligibility. A committee might recommend funding without being able to release it. Those are possibilities, not rules that apply to every public body. Read the published role documents and ask the official liaison to confirm the route you're working with.

Work from the current record

Find the current public notice, agenda, proposal, timetable and decision record where they're available. Keep each title, date and official location. A social-media summary can help you find an issue, but it may leave out a condition or describe an earlier version. If documents disagree, ask the designated contact which one applies at this stage.

MAP THE DECISION RATHER THAN THE INSTITUTION'S REPUTATION

EPA's public-participation planning guidance connects people's input to the decision process and asks planners to be clear about the influence people actually have. On your map, name the open question and show how a contribution reaches the person deciding it. If a session offers information but no voting authority, don't describe it as a vote.

Show what still needs checking

Name the stages in a simple sequence and mark any unconfirmed dependency with a question mark. You might show a recommendation, funding approval, operational preparation and review. Keep the distinction between an expected route and a guaranteed result. Add the next official check and the person responsible for making it.

Before you use the map to guide anyone else, send the draft to the appropriate liaison. Ask them to check the authority, sequence and dates, and keep the version date visible. An openly marked uncertainty gives your group something to resolve. An assumed approval can send people down the wrong route, however polished the diagram looks.

MATCH THE CONTRIBUTION TO THE STAGE

Ask where the decision has reached before choosing what to contribute. Early on, an account of a recurring barrier may help define the problem. Later, the decision-maker may need a comparison of options or a response to a published proposal. The same evidence can do different jobs, so start with the official question and the stage.

Distinguish policy, resources and implementation

A proposal can be supported in principle while lacking an approved budget or delivery arrangement. Ask whether the decision concerns the rule, the allocation of resources or the method of carrying out an existing commitment. An approved priority does not by itself authorize a volunteer to order equipment or promise a service date.

Check whether the relevant resource is one-time or continuing. A short project may need funding for setup and a separate arrangement for maintenance. You do not need to become a finance expert to ask who will maintain the result, but actual cost, procurement and funding questions belong with the authorized staff and advisers.

Work from verified dates

Record the formal submission route, deadline, meeting date and expected response point, if provided. Distinguish a published deadline from an organizer's preferred planning date. If you need an accessible format or another participation route, ask the responsible office early. Do not invent an extension or assume that an informal conversation counts as a formal submission.

If the relevant stage has closed, ask what routes remain. There may be implementation feedback, a later review or a defined challenge process; there may also be no immediate opportunity to change that decision. Acknowledge the current limit instead of encouraging people to spend time on a request that cannot be considered through the route you named.

MATCH THE CONTRIBUTION TO THE STAGE

Prepare the smallest useful contribution

State the issue, the evidence, the implication for this decision and the action you are asking the body to consider. If the issue is outside its authority, ask for the correct route or a referral rather than demanding a promise it cannot make. Keep supporting material relevant and label assumptions.

A concise contribution can identify a missing condition without proposing a complete solution: “The draft funds the initial printing but does not identify an owner for updates. Could the recommendation name an update process before approval?” This links the observation to a decision the body can examine.

A RECOMMENDATION IS NOT A RELEASED BUDGET

Fictional process packet. The Riverbank Community Fund has a one-time allocation of 12,000 units for small public projects. Its resident panel may recommend a shortlist. The fund committee makes the award decision. Staff then check the required agreements before releasing any money. The packet sets an application deadline of 10 May, a panel recommendation meeting on 24 May and a committee decision meeting on 7 June. These dates and rules belong only to this fictional situation.

Stage	Authority in this packet	Open question
Applications before 10 May	Applicants submit through the published route	Is the proposed work eligible and complete?
Panel on 24 May	Residents recommend a shortlist	Which eligible proposals best meet the published criteria?
Committee on 7 June	Committee decides awards	What will be funded and under what conditions?
Staff checks afterward	Staff confirm required agreements before release	Are release conditions satisfied?

A RECOMMENDATION IS NOT A RELEASED BUDGET

Locate the proposed commitment

A young-professional advisory member helps a neighborhood group prepare a public noticeboard proposal costing 3,000 units. The resident panel recommends it. The group's draft announcement says the funding has been secured and installation will begin the next week. Neither claim follows from the packet: the committee has not decided, and release conditions remain.

The proposal also names no owner for future updates or removal of out-of-date notices. The advisory member can ask the group to clarify maintenance and ask the official contact how a clarification may be considered at this stage. They cannot assume that an application may be rewritten after the deadline or that a preferred local organization must accept maintenance.

Write an accurate update

A suitable draft says: "The resident panel has recommended the noticeboard proposal. The award decision is scheduled for the committee's 7 June meeting. Funding and installation are not yet confirmed. We are checking the maintenance arrangement and the permitted route for any clarification." The statement keeps the recommendation visible without treating it as money available to spend.

Practice a different route

A second group learns of the fund on 12 May, after the stated application deadline. Draft the question it should ask the official contact. Do not invent a late-submission exception. Then identify what useful preparation could continue for a future opportunity without promising that another round will occur.

Question for the official contact

A RECOMMENDATION IS NOT A RELEASED BUDGET

Preparation that can continue

The decision still ahead

24 May

Panel recommends

7 June

Committee decides

Afterward

Staff check conditions

The panel's recommendation does not release the money.

KEEP THE STATUS AND THE NEXT ACTION TOGETHER

Keep the route and the current status together. A process map shows where a proposal could go; a status record shows where it is today. Use both when you update residents or partners. A scheduled meeting tells you when a decision may be considered. Check a reliable record or authorized confirmation before saying what was decided.

Read conditions as part of the decision

Continue the fictional Riverbank case with a new exercise update: the committee's official record on 7 June approves an award of up to 3,000 units, conditional on a maintenance agreement and staff completion of the fund's required checks. No release or installation date is recorded. Write down all three facts. Dropping the condition would change the practical meaning of the award.

A suitable update is: "The committee approved a conditional award of up to 3,000 units on 7 June. The maintenance agreement and staff checks remain outstanding. We do not yet have confirmation of release or an installation date." A separate next action can ask the designated liaison which documents are required and who will confirm completion. Do not fill an empty owner field with a person who has not accepted the work.

Make the follow-through usable

The advisory member can prepare an issue list, identify approved public documents and ask for clarification. They cannot sign an agreement, instruct a supplier or spend against the award unless that authority is separately established. If staff later confirm release, that confirmation still does not answer every delivery question. Site permission, procurement and installation arrangements may have their own responsible people and requirements.

KEEP THE STATUS AND THE NEXT ACTION TOGETHER

Record the source of each update and when it was checked. If a publication date changes, correct the version people actually use and tell affected contributors through the agreed route. A correction buried in an internal note will not help someone who has already made plans around the earlier announcement.

Try two short responses

First, answer the late applicant from the previous section. A workable question is: “We saw the published 10 May deadline after it had passed. Does any official route remain for this round, and where can we find its rules? If none remains, where should we look for future notices?” While awaiting an answer, the group can describe the need, check existing provision and discuss feasible maintenance with potential partners. It should avoid spending or recruiting on the assumption that another round is coming.

Second, a resident asks why their suggestion was not selected. Use only the official record and information you may share. Explain the published reason when one is available, distinguish it from your own interpretation, and identify any official feedback or review route. If the record does not explain the point, say what you are asking the liaison to clarify. Do not invent a reassuring reason or disclose another applicant's restricted material.

A short status record

Proposal and date of this status check

What is confirmed, with the official source

KEEP THE STATUS AND THE NEXT ACTION TOGETHER

Conditions, unresolved questions and what has not been authorized

Next action, proposed or accepted owner, and next check date

Who needs the update, through which permitted route

Keep the record proportionate. Its purpose is to prevent avoidable confusion and lost responsibilities. Store restricted material under the host's rules and keep the public update limited to information cleared for that audience.

BUILD A PUBLIC DECISION PATHWAY

Use official public material or the fictional fund packet. Keep the map short enough that someone else can find the next decision. Mark any fact you haven't verified instead of filling the gap with an assumption.

The issue and the specific decision currently open

The decision-maker, advisory roles and source of their authority

The current stage and the official source or version checked

The contribution route, deadline and access arrangements

The evidence or perspective that would be useful at this stage

BUILD A PUBLIC DECISION PATHWAY

The next approval, resource or implementation dependency

Who will confirm the result and report back to contributors

The remaining uncertainty and the next official check

Read the map as a newcomer

Ask a reader to explain what they can influence and what they cannot. If they think a recommendation guarantees implementation, revise the map. Confirm dates and permissions again before using it for a real submission.

OPTIONAL SUPPORT FOR CHECKING A DECISION PATHWAY

If you are supporting a group

Optional notes if you're working through the pathway with a group. Share the Riverbank packet, blank pathway and status record. Make clear that its authority rules belong to this fictional situation. Give people time to read, an accessible text version and a choice of speaking, writing or dictating. They can take part without experience of a public committee. Keep anyone's live dispute out of the case.

A forty-five-minute session

Use the first five minutes to identify the exact decision. Allow ten minutes to map the original packet, ten to draft the post-panel update and ten to respond to the new conditional-award fact in the preceding section. Use the final ten minutes for peer review and revision. Extend or split the session when reading or discussion requires it; the timing is a suggestion, not a performance test.

In groups of three, one person prepares the map, one reads it as a resident and one checks it against the packet. Rotate after the first update. The resident asks, "Can I tell people installation starts next week?" The reviewer should point to the missing authority or dependency, then ask for a useful next step. They should not merely tell the writer to be cautious.

Questions to check together

- Authority: the map assigns recommendation to the panel, award decisions to the committee and release checks to staff. Revision is needed if one stage's power is transferred to another without evidence.
- Timing: the map keeps 10 May, 24 May and 7 June distinct, and does not turn the later staff checks into an invented fixed release date.

OPTIONAL SUPPORT FOR CHECKING A DECISION PATHWAY

- Evidence: the update names its source and includes material conditions. Revision is needed if “recommended” becomes “secured” or an expectation becomes a completed action.
- Follow-through: the next action is specific, belongs with a suitable role and distinguishes proposed ownership from accepted ownership. Contributors have a realistic route to learn the result.
- Transfer: the learner can name what must be checked before applying the map elsewhere, including current rules, authority, dates, access and information-handling arrangements.

Try three feedback labels: ready for this situation, revise a named point, or cannot judge without a missing fact. An accurate statement of uncertainty can be a sound answer when it comes with a sensible next check. Focus on a correct, usable account rather than rewarding the most polished diagram.

Take a useful next step in your role

Choose a task you’re authorized to work on and ask its liaison to check your pathway. If the host permits, keep the first version and the correction. When you next discuss the work, explain a change you made because of that check. It can show an improvement in this task, but it does not establish broader civic impact or prove the guide’s effectiveness.

Further reading: EPA's process-planning guidance and the OECD participation guidelines can help you examine how a contribution connects to a decision. They are guidance for designing participation. The applicable institution supplies the actual rules and authority.

WORKING ACROSS ORGANIZATIONS

WORKING ACROSS

Who can this group speak for, and who will carry the work after the meeting?

A coalition brings people or organizations together around a shared task, often with different responsibilities, resources and reasons for joining. You might agree that residents need clearer information while still disagreeing about what to publish, whose services to include or who should keep it current.

Chapter 5 focused on work with one community partner. With several partners, you also need to handle different approval routes, uneven capacity, missing voices and work that continues after the launch. Use the shared purpose to start the conversation, then agree the boundaries, who has accepted each responsibility and how you'll change course if needed.



Photograph: see image credits.

Put this to use

- 1** Describe the coalition's task without claiming authority over all its members.
- 2** Distinguish personal experience, organizational authorization and evidence from people affected.

WORKING ACROSS ORGANIZATIONS

- 3** Check contributions, review capacity and maintenance before accepting a launch plan.
- 4** Renegotiate a hosting offer when it changes the service or the information collected.

Before you start

Use the fictional directory situation here. For a real project, remove private information and get permission to use the material. A coalition may be informal, hosted by an organization or governed by specific rules, so check its actual arrangements. These pages don't create a legal structure or authorize anyone to bind a partner.

Give the less visible jobs the same attention as the launch. Someone needs to check a telephone number, correct a service description, respond to a removal request and arrange cover when a volunteer leaves. Those jobs determine whether people can keep relying on the result.

GIVE THE SHARED TASK A CLEAR REMIT

Write a sentence that names the work the organizations have actually agreed to try. “Prepare a checked list of public contact routes for six named organizations” gives everyone a task to examine. “Speak for the whole neighborhood” needs a different basis and may go beyond what anyone was asked to do.

Separate three kinds of contribution

Personal experience

A member can explain what they have encountered, within their comfort and permissions. Their experience matters, but it does not automatically describe everyone who uses the service.

Organizational authorization

A member may be authorized to check their organization's entry, offer a room or approve a statement. Ask which of those things their role permits. Attendance alone does not authorize every future commitment.

Evidence from people affected

The coalition may hold listening notes or service feedback collected for an agreed purpose. State who contributed, how the information was gathered and whose experience is missing. Avoid turning an organizational representative into a substitute for all service users.

GIVE THE SHARED TASK A CLEAR REMIT

A person can contribute in more than one capacity. Make the capacity explicit when it affects a decision: “I can check the public telephone number today; my manager must approve hosting, and I cannot authorize the use of participant contact details.” This lets others plan around the real boundary.

Treat absence as missing participation

When an organization misses a meeting, first check what has already been agreed about decisions in its absence. An established process may allow some decisions to proceed; another may require particular approvals. Do not invent either rule. If the group has no rule, describe the proposal as pending the relevant agreement instead of treating silence as consent.

Ask absent members for the specific information or authorization needed, using an agreed contact route and a reasonable response date. Make clear what will happen if a reply does not arrive. The answer may be to omit an unverified entry, reduce the project or postpone release. Repeatedly chasing someone does not create an obligation for them to participate.

Keep difference visible without making every decision endless

Separate matters that require each organization's permission, such as use of its name under its policy, from editing choices the group has delegated to a reviewer. Agree what can be decided between meetings and what must return to members. Record a disagreement about a public claim rather than presenting a joint endorsement that some partners have not given.

When one organization supplies most of the staff time, ask how that affects the work and the discussion. More resources may justify a larger delivery role, but do not by themselves establish authority to speak for other members. A small partner may know about a serious barrier that a large partner's records overlook.

PLAN THE RESOURCES THAT KEEP WORK USABLE

Write down what people will provide, when it's available and who has accepted the commitment. "Members will help" leaves out the information you need to decide whether the project can go ahead. Count supervision, review, access arrangements and administration alongside the main task.

Count work in terms people can confirm

For a modest directory, an editor might estimate two hours to combine six entries, while each organization needs time to check its own information. These are planning estimates, not commitments. Ask the people doing the work whether the estimate fits. Record accepted hours or an agreed output, any support required, and the latest date for a decision if capacity changes.

A donation of a web page does not settle who can publish changes. Ask who controls the account, who approves content, who responds to errors and how the coalition will retrieve an editable copy if hosting ends. Do not circulate passwords in the agreement. Use the host's approved access process and obtain the permissions required for each role.

Choose a maintenance promise the group can keep

Describe the trigger as well as the schedule. A monthly review may be useful, but a member reporting that its service has closed needs a quicker correction route. Ask what happens when an entry cannot be verified. A visible last-checked date and a route to the organization's current information may help readers judge freshness; neither makes stale information safe indefinitely.

PLAN THE RESOURCES THAT KEEP WORK USABLE

Maintenance needs an accepted owner and cover. It can be shared, but shared work still requires a coordinator who knows whether checks were completed. If no one accepts that role, choose a smaller result with a clear end date or keep the work as a draft. Do not give a newcomer permanent responsibility because they happened to create the first file.

Decide how to reduce or end the work

Agree how the group will respond if the need changes, a partner leaves or funding ends. Options include reducing the number of entries, moving responsibility with permission, linking to an existing maintained resource, or withdrawing the directory. Before closing a public resource, consider how people relying on it will learn where to go next. Keep records and handle data according to the host's requirements.

Community Tool Box treats coalition maintenance as deliberate work on purpose, operating arrangements, membership, resources and relationships. It also discusses changing direction or ending a coalition. Use that practical guidance to ask what your group can sustain; it does not prove that any particular arrangement will succeed. The plan still needs testing with the people who will carry it.

THE DIRECTORY THAT NO ONE OWNS

Fictional case. Six local organizations have been invited to prepare a directory of their public services: Alder Advice Point, Bridge Community Kitchen, Canal Skills Exchange, Market Welcome Desk, Orchard Neighbors and Station Volunteer Link. Four attend the first planning meeting. Orchard Neighbors and Station Volunteer Link are absent and have not approved entries or joint publicity. The six organizations do not cover every local service.

A volunteer combines old public web descriptions into a draft with six entries. Some opening times have not been checked. The draft is titled “The complete community support directory,” and a proposed announcement says all six organizations endorse it. No organization has accepted maintenance. The volunteer is available for this month only.

First identify the unsupported claims

The word “complete” is not supported by a six-organization list, and the case supplies no method for identifying all relevant services. Four people's attendance cannot establish six organizations' endorsement. Old public information gives the team something to verify, not assurance that each service still operates as described.

A more accurate working title is “Draft public contact list for six local organizations.” A proposed note can explain that entries and participation are being checked and that the list does not cover all local services. This is an internal review description, not permission to publish unverified information.

THE DIRECTORY THAT NO ONE OWNS

Assign the next checks without inventing acceptance

The meeting can propose that each organization check its own entry and identify who can approve use of its name. A liaison should ask the two absent organizations whether they wish to participate and what approval they require. Record those actions as proposed until people accept them. Keep a separate issue for maintenance; confirming six entries once would not resolve ongoing responsibility.

The volunteer's remaining availability supports a bounded offer: "I can prepare the review draft and make one agreed revision this month. I need a named reviewer for each entry and someone to accept the ongoing update role before this is presented as a maintained service." The coalition must decide whether that offer fits what it needs.

Compare feasible routes

Route one is a maintained six-organization directory, conditional on checked entries, permissions and accepted maintenance. Route two is a dated, limited contact sheet using only verified and approved entries, with a clear review or withdrawal date agreed by the host. Route three is to improve signposting to an existing maintained resource, if a suitable resource can be verified. None should be described as a complete account of the community.

The group can choose to delay publication while it checks these conditions. If it publishes fewer entries, it should say what the selection covers and why other entries are absent, without implying that unlisted organizations are less legitimate or unavailable. Do not speculate about why a partner missed the meeting.

THE DIRECTORY THAT NO ONE OWNS

Draft the next meeting note

“The current file is a six-entry review draft. Four organizations attended; two have not yet confirmed participation. Completeness, endorsement and current service details are unverified. We need responses on entry approval and an accepted maintenance arrangement before deciding what can be released. The editor's role ends this month.” Follow this with the actual next actions and accepted owners as they are agreed.

A HOSTING OFFER CHANGES THE PROJECT

Continue the fictional case. Bridge Community Kitchen offers to host the directory at no charge. Its proposed page would require visitors to enter an email address before viewing the list and would add those addresses to its events mailing list. The coalition originally planned to publish public service information without collecting residents' contact details. No arrangement for the new collection or mailing has been agreed.

Notice the change in purpose and burden

The offer changes more than the location of a file. It adds collection of personal information and a new use for it. It may also prevent people who cannot or do not want to provide an email address from seeing the information. Agreement to list an organization's public telephone number does not establish permission to collect residents' email addresses or send them unrelated updates.

Leave the proposed form inactive and keep existing contact lists out of it. A visitor needing service information has not thereby agreed to marketing. Ask the authorized host to review the purpose, necessary information, access method, privacy notice, permissions, storage, access controls and retention under applicable requirements. Bring in qualified support where needed. Adding a checkbox does not settle compliance.

Make a bounded counterproposal

A practical response is: "Could the directory be available without an email gate? Our agreed task is public signposting. Collecting addresses and adding people to an events list introduces a separate purpose that has not been approved. If an optional update service is useful, please scope it separately with the responsible staff and an appropriate permission process."

A HOSTING OFFER CHANGES THE PROJECT

Check whether “free hosting” includes advertising, use of partner logos, claims of endorsement, third-party tracking or future charges. Ask about relevant conditions before accepting, rather than assuming they exist. Compare the offer with the coalition's actual purpose and capacity. A resource can be generous and still require changes before it fits.

When the host revises the offer

A further fictional update says the host agrees to remove the email gate and mailing-list feature. That resolves those proposed features, but the group still needs to confirm the actual page behavior, publication approval and maintenance responsibility. Do not announce the whole project ready because one objection has been addressed.

If the host cannot provide a suitable arrangement, the coalition can decline or seek another permitted route. It should preserve the verified content already prepared and give the volunteer a clear stopping point. Choosing a smaller deliverable can protect both public access and the time of the people doing the work.

WRITE A COALITION WORKING AGREEMENT

Use this sheet to agree on a defined piece of work. It doesn't create legal authority or replace the organizations' own agreements. Mark each commitment "proposed," "accepted" or "unknown," and ask the people involved to correct the record before you rely on it.

Purpose: what shared need are we addressing, and what will we produce?

Scope: which organizations, services, audiences and dates does the work cover, and what is excluded?

Participation: who attended, who is absent, whose experience is missing, and what follow-up is appropriate?

Authority: what may each representative approve, and what must return to their organization?

WRITE A COALITION WORKING AGREEMENT

Decision process: what can the editor decide, what needs member approval, and how is disagreement recorded?

Resources: what time, review, equipment, access support or funding has actually been accepted?

Information: what will be published or collected, for which purpose, under whose approved arrangements?

Quality: who verifies each entry and authorizes release, using what acceptance criteria?

Maintenance: accepted owner, review date, urgent correction route and cover during absence

WRITE A COALITION WORKING AGREEMENT

Change and closure: what triggers a scope review, transfer, pause or withdrawal, and who decides?

Test the agreement with a change

One of the absent organizations replies that its hours change weekly and it cannot check a monthly directory. Describe an option that respects that limit. For example, the group could propose a verified link to the organization's current public information with a clear explanation, rather than copying hours it cannot maintain. The organization and host still need to approve the arrangement under their procedures.

Now the editor leaves earlier than expected. Ask another person to locate the current draft and identify the next action without a private explanation from the editor. If they cannot, improve the handover. If no one accepts the remaining work, record that the project is paused or narrowed by the authorized people rather than leaving it apparently active.

OPTIONAL SUPPORT FOR A WORKING AGREEMENT

One way to work through it together

Optional notes for working through an agreement together. Allow about fifty minutes: five to read the remit, ten to find authority and representation gaps, ten to compare directory routes, ten for the hosting offer and fifteen to draft and review the agreement. Adapt the timing and response formats to people's access needs. Use fewer decisions if the group needs more time.

Work in threes or fours, with an editor, an organizational representative and a reviewer. A fourth person can track assumptions and commitments nobody has accepted. Share all the fictional facts in writing and rotate roles. Focus on the evidence and authorization you're missing. Nobody should be asked to impersonate an entire demographic group or guess what absent people think.

Questions worth asking

Ask, "What exactly did attendance authorize?" "What would a reader infer from complete?" "Who would notice an outdated entry?" and "Which part of the hosting offer changes the information purpose?" When someone proposes a solution, ask who must agree and whether they have the capacity. A plan that assigns every gap to a fictional volunteer is still incomplete.

Questions to check together

- Remit and representation: the agreement states the limited task, distinguishes the four attendees from six invited organizations and identifies missing participation without speaking for it.
- Public claims: the draft avoids unsupported completeness and endorsement claims and makes verification status understandable.

OPTIONAL SUPPORT FOR A WORKING AGREEMENT

- Resources and maintenance: the plan includes accepted review and update roles, realistic limits and a response if nobody takes ownership.
- Purpose and permissions: the response recognizes the email gate and events list as new activities requiring an appropriate separate decision; it does not infer consent from existing participation.
- Follow-through: the chosen route can be explained in terms of conditions, next actions, recipients and a review or closure point.

For each point, use ready for this situation, revise, or missing fact prevents judgment. Ask the reviewer to point to the sentence behind their view and suggest a concrete change. These questions help you work through a decision; they are not a validated measure of leadership or coalition quality.

Review after a real use

If the host approves a real trial, ask which uncertainty the sheet helped resolve. Perhaps someone accepted the entry-review role, you removed an unsupported promise or a maintenance gap became visible. Record that change at its actual scale. Claims about trust, representation or lasting community benefit need evidence suited to those claims.

LEARNING FROM WHAT HAPPENED

LEARNING FROM WHAT

What does the evidence let you say, and what decision should it inform?

When a community project ends, people understandably want to know whether it helped. Start with the decision the host needs to make. Should the process continue? Does an instruction need changing? Is a larger review needed? Counting whatever is easiest may still leave that decision unanswered.

Chapter 6 separated work produced, work used, change observed and an outcome caused. Keep those distinctions with you as you make a small evaluation plan. Use ordinary records and the numerical example to work out what the information can tell you, what it leaves out and what collecting it costs.



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Put this to use

- 1** Connect inputs, activities, outputs and intended outcomes without treating the links as proven.
- 2** Define a measure so that another person could count it in the same way.

LEARNING FROM WHAT HAPPENED

- 3** Compare counts and rates, identify changes in conditions and avoid unsupported causal claims.
- 4** Recommend a proportionate next step that protects necessary support and limits unnecessary data collection.

Before you start

Use the fictional form-completion situation. You won't need personal participant data to work through it. For real work, ask the host who may access records, how results may be reported and whether evaluation, research, privacy or specialist review is required. A volunteer worksheet cannot authorize a study or decide those obligations.

A useful finding can be modest. If you can identify a question that repeatedly confuses people, that may be enough to support a careful revision. You don't need to claim the project transformed a service.

DESCRIBE THE WORK BEFORE CHOOSING A MEASURE

Write a short account of what the project uses, does and produces, and the change people hope will follow. This gives you a way to examine the assumptions. It does not show that the hoped-for change happened or that the project caused it.

Inputs

Resources made available to the work, such as staff time, a room, approved funding, equipment or a volunteer's agreed hours. Record actual use separately from a budget or offer that has not been taken up.

Activities

Actions undertaken with those resources, such as revising instructions, testing a form with appropriate permission, training helpers or providing an assisted route.

Outputs

Immediate products or units of work delivered: an approved instruction sheet, a completed staff briefing or a count of help sessions. Define whether a count concerns sessions, contacts, forms or distinct people.

DESCRIBE THE WORK BEFORE CHOOSING A MEASURE

Outcomes

Changes the work is intended to support, such as fewer avoidable errors or people being better able to complete the process. Longer-term aims may include reliable access to a service. Those aims need suitable evidence; a finished sheet does not demonstrate them.

Make the connecting assumption explicit

In a fictional registration project, the team hopes that clearer wording will reduce missing information. That expectation assumes that unclear wording is a material cause of omissions and that people can access and use the revision. If an applicant lacks required documents or cannot use the available route, wording alone may not address the problem. Ask what else the service needs to provide.

Classification can depend on the question. A completed form might be counted as a service output in one report and as an immediate outcome of an instruction change in another. State your definition rather than arguing about a label in isolation. The important discipline is to avoid using the existence of work as automatic evidence of its benefit.

Choose a decision-sized question

Replace “Did we improve access?” with a question you can reasonably examine: “During the two review periods, what proportion of first submitted forms had a required item missing at initial check, and what support was available?” That question can inform a review of the process. It cannot tell you about people who never reached submission or all the reasons they did not.

Ask the host and people affected whether the question matters. A faster process that becomes harder to use may fail their purpose. Include a practical way to notice barriers, burden or unintended effects rather than treating one favorable number as the whole result.

MAKE THE COMPARISON WORTH READING

Before you look at results, define the measure where possible. Give it a source and a time period, and name the denominator if you're using a rate. That helps you avoid changing the measure until the story sounds favorable. If you do need to change it, record why and explain which comparisons no longer hold.

Specify what is counted

For the fictional form measure, count a first submitted form as incomplete when it lacks at least one required item at the initial check. Count that form once in that period, even if it returns with corrections. The denominator is all first submitted forms included in the initial-check record for that period. The count describes forms, not necessarily unique people. A different service may need a different rule, but it must make the rule clear.

Do not silently treat an unknown status as complete. Report how many records are missing the necessary information and explain how they were handled. If it is unclear whether the same rule was used in both periods, establish that before presenting a rate comparison as like for like.

Check the conditions around the figures

Ask whether the same kind of forms, users, service rules, opening hours and recording process were involved. Note changes in staff, available help, demand and external circumstances. Small groups may differ simply because different people attended. A before-and-after comparison can show an observed difference while leaving its explanation uncertain.

MAKE THE COMPARISON WORTH READING

Comparison improves when the definition and records are consistent, but perfect consistency is not always feasible or desirable. Do not withdraw needed support or exclude harder-to-serve people to make the numbers look comparable. Describe the change in conditions and narrow the conclusion. Seek suitable evaluation expertise if a consequential decision needs stronger evidence.

Keep the burden proportionate

Use existing authorized records when they can answer the question accurately enough. Estimate the time required to check them and who will do it. A long questionnaire may create more work for residents and staff than the decision justifies. Avoid collecting names, detailed personal stories or sensitive characteristics because they might be interesting later.

Ask how someone can decline optional feedback without losing service, and how a person who cannot use the main response format can contribute. Follow the host's approved arrangements for information, consent where applicable, access, retention and reporting. Small-group results can still identify someone, especially when combined with a detailed story. A general report should omit unnecessary detail and use appropriate disclosure safeguards.

CDC's 2024 framework emphasizes collaborative engagement, appropriate evaluation standards and using findings. It is a nonprescriptive framework, originally presented for public health and usable in wider settings. The small worksheet here is a teaching adaptation, not an implementation of every framework requirement or an endorsed evaluation method.

TWELVE OF FORTY AND SIX OF THIRTY

Fictional case. A community service tests a revised instruction sheet for one registration form. In the earlier review period, 12 of 40 first submitted forms were missing at least one required item at initial check. In the later period, 6 of 30 were incomplete under the same definition. The later period also had an extra helper available. The service has no comparison group and has not established whether the people submitting forms had similar needs in the two periods.

The record leaves out people who started but did not submit a form and people who could not reach the service. It provides no evidence about later service access, satisfaction or long-term outcomes. Use the figures and conditions supplied above without assuming other evidence exists.

Try the calculation before reading on

Earlier incomplete-form rate: show the numerator, denominator and percentage

Later incomplete-form rate: show the numerator, denominator and percentage

Difference between the two rates, with the correct unit

TWELVE OF FORTY AND SIX OF THIRTY

One conclusion the records support and one explanation they cannot establish

Work through the numbers

Earlier: 12 divided by 40 equals 0.30, or 30%. Later: 6 divided by 30 equals 0.20, or 20%. The later recorded rate is 10 percentage points lower. Use percentage points when subtracting percentages: 30% minus 20% equals 10 percentage points.

The number of incomplete forms fell from 12 to 6, but the total number of forms also fell from 40 to 30. “Half as many incomplete forms” describes the count and leaves out that change in volume. It is not the same statement as a halving of the incomplete-form rate. The rate declined by one-third relative to its earlier value, approximately 33.3%, if a relative change is needed. For this small report, the two rates and the 10-percentage-point difference are clearer.

Identify what else changed

The extra helper may have influenced completion. Differences in who attended, the difficulty of their situations or other unrecorded conditions may also matter. The case does not isolate the effect of the instruction sheet. Even a correctly calculated rate cannot tell you how much of the observed difference was due to the wording.

TWELVE OF FORTY AND SIX OF THIRTY

Write a claim the evidence supports

"Among first submitted forms in these two review periods, the recorded incomplete-form rate was 30% (12 of 40) before the instruction revision and 20% (6 of 30) afterward, a decrease of 10 percentage points. An extra helper was available in the later period, and the groups may differ. These records do not establish that the instruction sheet caused the change. They also exclude people who did not submit."

This account gives the reader the result and its limits. It does not need to erase the observed improvement simply because causality is uncertain. It should prevent the team from saying that the new sheet alone solved registration barriers.

USE THE FINDING WITHOUT OVERREACHING

The next decision in the fictional case is whether to continue the current registration arrangement and what to review next. The service manager has authority over staffing and publication. The volunteer team may summarize evidence and recommend checks; it cannot decide to remove a helper or change service eligibility.

Choose a useful next observation

A proportionate recommendation is to retain necessary support, subject to the manager's authorized service plan, and review the form's recurring omission points through approved records. Staff could note which questions generate requests for help and whether wording remains unclear. Before adding any new record, check that it answers a decision-relevant question, can be collected consistently and does not create unnecessary personal data.

If the host needs to understand the instruction sheet's separate contribution, ask a suitably qualified evaluator what design is feasible and ethical in this setting. Do not create a comparison by denying help that people need. A stronger design has to fit the service's obligations and people's circumstances; the desire for a cleaner result is not enough to justify a harmful change.

Test three proposed report sentences

Sentence one: "The new sheet cut incomplete forms by half." Revise it. It blends a count change with an unsupported causal claim and omits the lower total volume. Use the two rates, denominators and conditions from the worked answer.

Sentence two: "The pilot showed no useful result because we cannot prove causality." Revise it. The records show a lower observed rate in the later period. They can guide a cautious review of the combined arrangement, even though they cannot isolate the sheet's effect.

USE THE FINDING WITHOUT OVERREACHING

Sentence three: “Everyone can now register successfully.” Remove it. The evidence covers first submitted forms in two periods and says nothing about everyone who needed the service. Identify the missing group and ask whether the host already has suitable information about barriers before proposing additional collection.

Close the learning loop

Send the authorized decision-maker a short account of the question, evidence, limitation and proposed next step. Ask for the decision and owner to be recorded in the approved place. Return a suitable summary to contributors through the route agreed at the start. If the host does not take the recommendation, record the reason available rather than treating a different decision as proof that the evidence was ignored.

A review date matters only if someone accepts responsibility for using it. When your role ends, hand over the definition, source, calculation and open questions. Keep raw records in the approved system and give only the access the receiving role requires. Do not keep a private copy of participant information for your portfolio.

PLAN A PROPORTIONATE REVIEW

Fill this in before collecting new information. If an approved existing record is enough, use it. Treat a blank as a question for the host rather than permission to assume an answer. Write on the lines provided or continue on another sheet if you need room.

Decision: who will use the finding, for what choice, and by when?

Purpose: which change matters to the host and people affected?

Work: inputs, activities, outputs and intended outcomes, with the connecting assumptions

Question: what precisely do we need to learn at this stage?

Measure: count or rate, exact definition, numerator, denominator and period

PLAN A PROPORTIONATE REVIEW

Source: approved record or method, access permission and person checking accuracy

Coverage: who or what is included, excluded, missing or counted more than once?

Comparison: what conditions differ, and which explanations cannot be separated?

Burden and protection: time required, optional participation, access needs and information-handling arrangements

Interpretation: what wording would the evidence support, and what claim would go too far?

PLAN A PROPORTIONATE REVIEW

Use: reviewer, decision-maker, report-back route, accepted next owner and review point

Practice a missing record

A new exercise update says that five records in the later period have no initial-check status. The case does not say whether these five are included in the 30. Do not recalculate by guessing. Ask the record owner to establish the denominator and missingness first. Explain that the rate needs clarification and preserve the original figures as the previously supplied account until the correction is verified.

If corrected figures arrive, label the version and explain which conclusion changes. Learning includes fixing the record. A transparent correction is more useful than leaving a neat but unreliable percentage in circulation.

OPTIONAL SUPPORT FOR REVIEWING THE EVIDENCE

If you are supporting a group

Optional notes if you're supporting a group review. Bring the fictional figures, a calculator if useful, the blank sheet and enough time to read. Offer written, spoken or supported responses. Focus on interpreting evidence and making a responsible recommendation, rather than speed at mental arithmetic. Keep real participant records out of the session.

A fifty-minute practice

Allow ten minutes to describe the project and its intended outcome, ten to calculate the rates, ten to compare claims, ten to plan the next step and ten to review and revise. Extend or divide the work if needed. In pairs, one person explains a claim and the other checks the definition, denominator and limit. Swap roles for the missing-record exercise.

Ask what the group would need to know before recommending removal of the helper. Make clear that this activity authorizes no service experiment. Look for a next step that keeps necessary assistance in place and takes consequential questions about evaluation design to the people responsible for them.

Questions to check together

- Description: inputs, activities, outputs and intended outcomes are distinguished, and a hoped-for link is not presented as an observed effect.
- Measurement: the answer defines incomplete first submitted forms and does not confuse forms with distinct people or all potential users.
- Calculation: $12/40$ is 30%, $6/30$ is 20%, and the difference is 10 percentage points. Counts and relative percentages are not substituted without explanation.

OPTIONAL SUPPORT FOR REVIEWING THE EVIDENCE

- Interpretation: the extra helper and possible differences between periods are visible; no causal effect of the instruction sheet alone is claimed.
- Proportionality: proposed information is necessary, feasible and covered by appropriate permissions, with attention to burden, access and confidentiality.
- Action: the recommendation names a useful next check and the relevant authority, protects needed support and provides a route to report back.

For each point, mark ready for this situation, revise a specific point, or information missing. Ask people to change a sentence or a field and show what improved. Keep these as practical feedback questions rather than adding them into a score that predicts civic leadership or long-term service outcomes.

Try it with your own work

Choose a claim from a real authorized project, using a redacted version if needed. Ask, “What is the strongest statement this evidence supports today?” Then identify one additional observation that could usefully change the decision, and its cost. Sometimes the right choice is to improve the report with existing evidence rather than collect more.

TOOLS PRACTICE AND SUPPORT

TOOLS PRACTICE AND

What will help you put this into practice?

Choose from an optional group-session plan, a longer fictional situation, feedback questions and source links. Use what helps you work through a complete decision or return to something from an earlier section.



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Choose the material you need

If you're bringing a group together, use the optional session plan and adapt the pace.

Use the community welcome situation to bring several decisions and responsibilities together.

Use the rubric to identify a specific revision, then check the relevant local support route.

AN OPTIONAL NINETY MINUTE GROUP SESSION

For an optional group session, work in threes with a member, liaison and reviewer. In a group of four, add someone to track evidence and unanswered questions. Rotate the roles. Share accessible versions of the venue, drop-in, online-booking and supplier situations and the relevant blank tools ahead of time. Offer written or spoken responses and reading time before anyone takes a role. Use fewer cases or split the plan across two sessions if the group needs discussion time or a break. Keep real private community conflicts out of the examples.

AN OPTIONAL NINETY MINUTE GROUP SESSION

Minutes	Activity	Facilitator action
0 to 10	Name the responsibility	Explain advisory, governing, and project roles without assuming unlimited authority
10 to 25	Clarify the role	Use the venue case to clarify a boundary and a useful next action
25 to 40	Contribute to a meeting	Use the drop-in case and practice a thirty-second contribution
40 to 55	Check the evidence	Correct the online booking claim and identify a missing perspective
55 to 70	Compare the options	Use the supplier case and separate process issues from option comparison
70 to 82	Agree the project	Revise the project agreement when one condition changes
82 to 90	Review and carry forward	Exchange specific feedback and name one authorized next action

AN OPTIONAL NINETY MINUTE GROUP SESSION

Talk about the choice rather than the person

Ask, “What evidence supports that sentence?” “What power did participants actually have?” “Whose time does your plan rely on?” and “What would make the recipient able to use this?” Keep the conversation about those choices. Assertiveness, polished English or past access to boardrooms should not stand in for sound reasoning.

When a real concern appears

Pause the activity if someone raises a current safeguarding, misconduct, legal or sensitive complaint. Use the host’s relevant support route rather than asking the group to solve it. Respect the limits of confidentiality, and return to the fictional situation only when appropriate.

Host preparation and follow-through

Before the session, name a contact who can explain actual role boundaries, expenses, accessibility arrangements and reporting processes. Afterward, invite people to try one tool on an authorized task. At a short review, ask whether the person receiving it used it and what changed. Keep the information you collect proportionate and nonidentifying.

PREPARE THE COMMUNITY WELCOME PROJECT

Fictional situation. The Elm Street Community Hub asks an early-career advisory group to recommend how to use an approved \$1,200 project budget for a welcome activity for new residents. Staff will make the final decision and sign any agreements. The group has four volunteers with three hours each available over the next two weeks.

The information you receive

- Option A is an evening event: room \$300, refreshments \$450, required access arrangements estimated at \$250, printed information \$100, and contingency allocation \$100. The room is available but not yet reserved.
- Option B is a lunchtime information session in the hub's existing space: refreshments \$250, access arrangements estimated at \$250, printed information \$200, and contingency allocation \$100. Staff coverage is unconfirmed.
- Ten responses through a social-media form prefer evenings. Three telephone users say they cannot attend evenings. The team has not reached people who are new to the area and do not know the hub.
- A volunteer's employer supplies the refreshments for Option A. The volunteer asks to lead selection. No conflict procedure has yet been checked.
- A sponsor offers an extra \$200 in exchange for the attendee contact list. The host has not authorized that arrangement.

What to prepare

Prepare a decision brief, a short evidence summary, a four-action work plan, and a message explaining the next step to contributors. Identify which questions need staff or specialist guidance. Recommend a feasible route without inventing missing approval, cost, or demand information.

PREPARE THE COMMUNITY WELCOME PROJECT

A defensible response

Option A totals \$1,200; Option B totals \$800. Both remain conditional: A needs venue and access confirmation, while B needs staff coverage and access confirmation. The lower total alone does not establish the better option. Compare the purpose, participation barriers, staffing, timing, and actual support needs. Do not count sponsor money as available or share the list.

Disclose the employer connection through the designated process before deciding the volunteer's role in selection. State the limits of the response methods without treating the three telephone users as irrelevant. Propose a proportionate additional listening step through existing trusted channels and ask staff what choices remain operationally feasible.

Revision challenge

Staff can support only lunchtime, and an access estimate rises by \$150.

Recalculate Option B at \$950, explain the remaining uncertainty, and prepare a recommendation that acknowledges the evening preference without promising an unavailable option.

REVIEW THE DECISION AND THE RELATIONSHIP

Use these feedback questions with a fictional situation or a real piece of work with private details removed. Look at the choices, evidence and follow-through rather than someone's confidence or social connections. This is practical feedback, not a validated test or a ranking of who is fit to lead.

Criterion	Ready to use	Needs revision
Role	Authority and host support are explicit and verified	An invitation or title is treated as unlimited permission
Participation	Promised influence is honest and missing perspectives are named	Listening is a formality or one network stands for everyone
Judgment	Options, evidence, costs, and uncertainty are visible	A preferred answer hides incomplete information or a conflict
Delivery	The recipient agrees the scope, capacity, review, and acceptance	Volunteers promise unbounded work or create an unsupported dependency
Accountability	The decision is explained and the handover can be used	No response reaches contributors or outcomes exceed the evidence

REVIEW THE DECISION AND THE RELATIONSHIP

Make feedback useful

"Your brief clearly distinguishes the advisory recommendation from the staff decision. It does not yet show who will maintain the page after launch. Add an owner or state that the page will be a time-limited draft until the host accepts maintenance." The comment identifies a strength, a gap, and a specific revision.

Describe what changed in the work

Compare a first answer with a revised one using the same criteria. Notice whether the person now identifies a missing perspective, qualifies a claim or agrees a feasible scope. That better response shows practice within this task. It does not prove long-term civic impact or that the program caused an organization to improve.

Optional notes for hosts

Provide the actual role documents, materials, expenses process, training, and decision route. Do not invite a young person to represent a whole generation while excluding them from the information they need. Explain how their advice influenced the work, including when it did not. Make it possible to question the process, decline extra work, and leave the role responsibly.

Completion check

Leave with one revised tool, a confirmed next action, a person who will use the result, and a date to find out what happened. Service becomes more useful when the recipient can shape and accept the work.

FURTHER GUIDANCE FOR CHAPTERS 7 TO 9

Sources rechecked on 4 October 2026. Use these guides and frameworks to explore the questions further. They do not endorse Public Good, validate its activities or establish civic or organizational outcomes. The source record distinguishes the surviving Chapter 7 excerpt from the newly reconstructed fictional cases and tools, and records the later voice revisions.

Decision pathways and participation

US EPA: Public Participation Guide: Process Planning

The EPA page, updated 11 September 2026, discusses fitting public input to the actual decision process, clarifying what is open to influence and planning the route for participation. It is public-agency guidance. Use the current official notice, role documents and responsible liaison for the rules governing your own task.

OECD Guidelines for Citizen Participation Processes

The OECD publication (2022) describes steps and methods for designing, implementing and reviewing citizen participation. Use it to ask how a process connects purpose, participation and a decision. Do not assume that a method named in the publication is available or appropriate in every institution.

Coalition maintenance

University of Kansas Community Tool Box: Coalition Building II: Maintaining a Coalition

FURTHER GUIDANCE FOR CHAPTERS 7 TO 9

Community Tool Box, hosted by the University of Kansas, discusses deliberate maintenance of a coalition and options to change, reduce or end its work. Read it alongside your own partners' remit, capacities and approval arrangements. It is practice guidance rather than evidence that a particular coalition structure will produce a desired effect.

Proportionate evaluation

CDC Program Evaluation Framework

The CDC framework page, dated 20 August 2024, describes a nonprescriptive evaluation approach with cross-cutting actions, standards and steps. Use it to discuss useful questions, credible evidence and acting on findings. The Chapter 9 worksheet is an original practical tool. It does not replace qualified evaluation support for consequential decisions.

Check the actual requirements

For real work, check current authority, applicable law, governing documents, permissions, funding conditions, information-handling procedures and required specialist review with the responsible organization. These pages are not medical, legal or financial advice. Keep current official source titles, version dates and contact routes in the host's approved workspace. Leave private records out of a public group record.

FIND GUIDANCE FOR YOUR ROLE

Links checked on 2 October 2026. These professional and public-agency sources support selected practical ideas and further reading. They do not endorse Public Good or establish its effectiveness. Check jurisdiction-specific requirements locally. The cases, tools, optional group session and feedback questions are material to help you think through the work.

BoardSource role and purpose of a board of directors

Use to understand the distinction between governing and advisory bodies. Obtain role-specific induction and qualified advice about your actual organization and jurisdiction.

BoardSource advisory councils nine keys to success

A short professional reference on defining the council's purpose, supporting members, and connecting advice to the organization.

EPA selecting the right level of public participation

Explains why the public's promised influence must match the real decision process. Written for agency participation, including environmental decisions; it is not a rulebook for every volunteer group.

Community Tool Box conducting interviews

Use the preparation and question-design sections as starting points, alongside the host's consent, privacy, safeguarding and information-handling arrangements. Discuss the article critically: do not pressure people to disclose more than they intended, and agree how their information may be used and how factual corrections can be requested.

Community Tool Box developing facilitation skills

FIND GUIDANCE FOR YOUR ROLE

Further guidance for supporting participation and managing discussion. Whoever leads the conversation still needs to know the body's actual decision rules.

Community Tool Box developing an action plan

Supports planning around actions, owners, timing, resources, and communication. Adapt the level of detail to a manageable community project.

Section508.gov accessible meetings

Practical U.S. federal guidance for accessible meeting preparation. Ask your host's access contact to confirm appropriate arrangements and applicable requirements.

Build a local support record

Keep the current liaison, chair, governing documents, role description, expense process, information-handling rules, accessibility contact, and concern-reporting route in the host's approved workspace. Check them when the role or task changes. If a process is missing, make that the next question rather than inventing one.

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