

# KEY STEPS TO PLAN AND RUN AN ASSEMBLY

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ASSEMBLIES AS A TOOL FOR JUST DEMOCRACY

PARTNERS  FOR  
DIGNITY & RIGHTS

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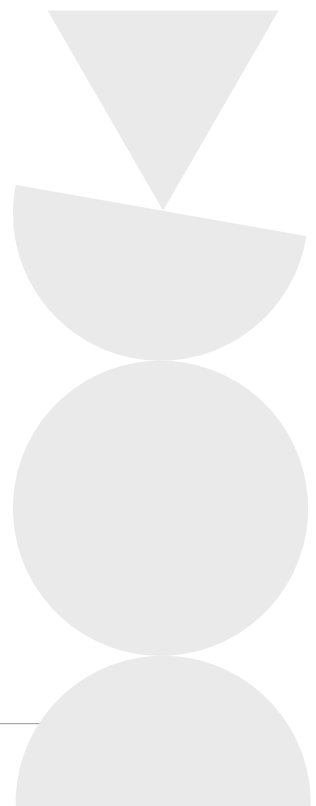
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# PURPOSE

This tool is designed to help people planning an assembly to work through the steps they will need to take for planning, execution and follow up. It is especially geared toward civic and governing-power assemblies that involve both community groups and a government partner, but most of the steps are also applicable to movement assemblies that do not involve government.

Based on existing assembly guides and our own observations, we have identified the following stages in planning and running an assembly. We divide these steps chronologically between foundational groundwork, pre-assembly planning, running the assembly and after the assembly. On Partners' for Dignity & Rights' website you can find our ["Assemblies as a Tool for Just Democracy"](#) report that accompanies this tool as well as with [links to helpful tools and resources](#) for each of the action steps in this document.



# KEY STEPS

## 1 FOUNDATIONAL GROUNDWORK

- ❑ **Articulate your overall goals and identify what you need to succeed:** Identify the overarching goals you want an assembly to serve, envision what a successful assembly would look like and identify what kind of time, expertise, collaboration, political support, funding, space and in-kind resources you would need to pull off a successful assembly that meets your goals.
- ❑ **Assess the context, including the commitment and capacity of key stakeholders and their relationships and trust with you and others:** Assess the context you're in and the commitment of potential community and government partners to decide if the idea of holding an assembly is worth pursuing further. Your assessment should ideally be an iterative process you work through together with key stakeholders. Create a power map to assess who holds decision-making power over whether or not to hold assemblies and who holds the power to make policy or organizational changes based on an assembly's recommendations. Assess who might be with aligned you, who might resist and who you would need to win over to carry out a successful assembly.
- ❑ **Decide whether an assembly makes sense:** Reflecting on your goals, vision, ingredients for success and assessment of your context, decide whether you want to pursue an assembly or whether another approach might be a better fit for your goals, your capacities and the context you're in.
- ❑ **Define goals, principles and the assembly's guiding question:** If you decide to move forward with an assembly, work with key community and government stakeholders to collaboratively define the goals of the assembly, what principles should guide an assembly's purpose and structure and what policy or strategic question the assembly should be tasked with answering.
- ❑ **Secure organizational and government backing:** Once you identify the key community and government stakeholders whose cooperation would be important for an assembly, work to secure their commitment to the process.
- ❑ **Budget money, staffing and technical and financial support:** Define the rough size and scope of the assembly and budget money and staffing to support the assembly, including for pre-assembly planning and post-assembly follow-up. Budget for training and technical support for government staff, community groups and participants. Budget for stipends for participants and grants and contracts for community groups and contractors.

- ❑ **Embed the assembly in governance processes:** Identify a clear purpose for the assembly in public agenda-setting, policy formation, policy decisions, policy implementation or monitoring and oversight. (See the [report](#) for a description of these phases of the policy process.)
- ❑ **Grant the assembly sufficient independence:** Within the defined parameters of the assembly, enable both the assembly planning team and assembly participants to deliberate and make decisions freely without interference. (See the [report](#) for a list of ways government can grant assemblies independence.)
- ❑ **Design the assembly to build civic capacity and power:** Conduct a power analysis and develop a plan for how to design and run the assembly in ways that will help build civic knowledge, capacity and power to support participatory democracy and help build energy behind the assembly's ultimate recommendations.
- ❑ **Protect the assembly against political counterattack:** Return to your power maps to assess potential political resistance to the assembly and its recommendations, and develop a plan to win the support of skeptical officials and stakeholders or to counterbalance their opposition by building an even stronger group of assembly supporters.
- ❑ **Work toward changing the culture of governance:** Orient yourself and the partners you are coming together with to try to change the culture of governance toward collaboration, equity, responsiveness or other goals. This is long-term, interpersonal relationship-based work that takes people building trust and alignment, both through talking and through collaborating on concrete things together.

## 2 PRE-ASSEMBLY PLANNING

- ❑ **Assemble a planning team:** Invite key stakeholders, government staff, issue experts and/or participatory democracy practitioners to form a planning team to execute the assembly. If elected officials commission the assembly, they should sit aside and allow the planning team to make its own decisions in planning and operating the assembly.
- ❑ **Determine the size, duration and schedule:** How many participants will there be, how many hours will the assembly meet, how much time between sessions is needed and how will the assembly be scheduled to fit in with legislative, electoral or other schedules?
- ❑ **Involve key community stakeholders:** Who are the key community, labor, faith or other community stakeholders who should be consulted and involved in the process in some way?

- ☐ **Develop a rulebook to guide the process.**
- ☐ **Contract with community groups for community-facing contributions like recruitment and public engagement.**
- ☐ **Contract and procure service providers for contributions like facilitation, interpretation and childcare.**
- ☐ **Accessibility and participant compensation:** How can you make assembly participation as accessible as possible, especially to workers, caregivers, young people, people with disabilities, people who speak English as a second language and others who face barriers to political participation?
- ☐ **Conduct outreach and select and onboard participants:** What selection method will you use to choose who participates in the assembly and which constituencies will participants represent?
- ☐ **Establish metrics and data for evaluation.**
- ☐ **Plan documentation, communications and public engagement.**
- ☐ **Plan the presentation of evidence, and identify, schedule and prepare speakers.**
- ☐ **Plan facilitation and activities.**
- ☐ **Schedule the daily agenda.**
- ☐ **Prepare for risks and plan physical security:** What sort of conflicts or problems could come up within the assembly that might get in the way of the process? What external opposition or roadblocks might be an issue? Are there any safety concerns at the assembly that should be addressed? Plan for potential scenarios.
- ☐ **Get feedback and do a trial run:** Get feedback from stakeholders on your rulebook and plans. Do a small trial run of any components of the assembly you want to work through.
- ☐ **Provide information to participants on what to expect:** Provide participants with a welcome letter and information packet before the first assembly session.



### 3 RUNNING THE ASSEMBLY

#### » Key phases

- ❑ **Opening:** Welcome participants, get people comfortable, underline the purpose and framing question of the assembly, set the tone and establish shared ground rules. Clarify the purpose, goals and agenda of the full assembly process, and how the assembly will connect into government, policy processes or community organizing during and after the assembly ends. Build relationships between participants, get people comfortable, invite them to bring their whole selves—their life experiences, thoughts, values and feelings—into the room.
- ❑ **Training:** Give participants guidance and tools to enable them to fully participate in the assembly process.
- ❑ **Learning:** Invite speakers with a range of perspectives and expertise to present to participants on the assembly's focus issue. Present participants with a mix of written, visual, audio or other information on the topic to accommodate different learning styles. Invite participants to bring their own experiences and thinking into the learning process, and allow them to invite additional speakers to present and to request information from assembly planners and government.
- ❑ **Deliberation:** Give assembly participants ample time to think through the issues together and to return to the learning process if needed.
- ❑ **Drafting recommendations:** Invite assembly participants to brainstorm possible solutions, get feedback on the ideas from experts and then adjust, prioritize and otherwise refine their list of working recommendations.
- ❑ **Decision-making:** Facilitate participants through making a joint decision (by consensus, a supermajority vote, etc.) about what final set of recommendations they wish to make.
- ❑ **Deliver recommendations:** Help the participants package their recommendations and any other information they want (guiding principles, alternatives they considered, etc.) into an official report, let them deliver this report directly to their audience and get an official response, and make the report publicly available.

#### » Key considerations during the assembly

- ❑ **Participant accessibility and support:** What measures like compensation, child care, language interpretation, transportation and scheduling around work hours can you take to enable a diverse set of people to participate? How will you support the emotional well-being of participants through the assembly process?
- ❑ **Facilitation, activities and conflict management:** Who will facilitate assembly sessions, what guidance will they have and how will they be recruited and

trained? What kinds of activities will you build into each segment of the assembly to facilitate interactive learning and thinking and to accommodate multiple learning and processing styles? How will you address interpersonal conflicts that might arise in the assembly process?

- ❑ **Sequencing:** What order will you schedule activities in, will there be opportunities to loop back as additional information or questions come in, and will you leave time or optional add-on time?
- ❑ **Documentation and data collection:** What data, media, notes and other information will you collect at assembly sessions?
- ❑ **Observation:** Who (government, researchers, journalists or others) will be invited to observe the assembly, and how will be asked to engage and behave?
- ❑ **Broader public engagement:** How will you reach beyond assembly participants to educate and engage the broader public around the assembly before, during and after it happens?
- ❑ **Digital engagement and data collection tools:** What kinds of digital tools will you use in the assembly to facilitate learning, data collection and information processing? What digital tools will you use outside the assembly to collect information from and communicate to stakeholders, officials and the public?



## 4 AFTER THE ASSEMBLY

- ❑ **Evaluation and documentation:** How will you evaluate the assembly process, its impacts and lessons learned? How will you share these findings, and with whom?
- ❑ **Public engagement:** How will you use the assembly to move toward building broader public agreement and energy around the assembly and its recommendations?
- ❑ **Movement mobilization:** How will you build public energy and momentum around the assembly and its recommendations among the public at large and among stakeholder organizations?
- ❑ **Policy decisions and implementation:** How will you encourage government and relevant private institutions to act on the assembly's recommendations, and how will they be held accountable over time?
- ❑ **Institutionalizing co-governance:** Can you continue running assemblies and other collaborative governance efforts, can you further strengthen their design and operations and can you further institutionalize them in governance, policy processes and community organizing to deepen their impacts?



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