

**THE REPRESENTATION ROLE AND COMPETENCY**

**PART II  
TRAINING AND GOVERNANCE TOOLS**

## OVERVIEW

*Part II* of each handbook in the *UNCHS Elected Leadership Series* has been prepared to help trainers and facilitators design learning events based on the ideas and concepts contained in *Part I: Concepts, Principles and Strategies*. The term “tool” is used as a metaphor for the best means to achieve a specific end by recognizing the importance of the “right” tools to the successful accomplishment of any task. In the same way, the trainer’s task is to choose the right learning tool to help training participants acquire the knowledge and skill needed to perform important job requirements. With this in mind, *Part II* offers trainers a variety of knowledge and skill-building activities as tools for helping participants gain increased proficiency in a specific role or competency.

Considerable care has been taken in the selection and arrangement of training tools for inclusion in each toolbox. The mix includes tools that offer participants new things to think about, that provide them with opportunities for self-discovery, that encourage them to experiment with new ways of doing things, and that help them decide on specific ways to use what they have learned when they return home to their leadership roles. There are tools to help participants get to know one another and feel comfortable more quickly in an unfamiliar learning environment. Each toolbox includes activities to raise energy levels in a group of participants and others to inspire creative thinking or increased openness to alternatives. All of the tools are based on principles of experiential learning and designed to encourage vigorous interaction among workshop participants.

The tools in this part of each of the handbooks have been sequenced to facilitate an orderly process of learning. While they can be used just as they are to design an elected leadership workshop, that was not our intention. Rather we see this grouping of tools as only one design alternative. Each trainer is encouraged to change the content of the tools as well as the order in which the tools are to be used. Other materials can and should be added to assure that the training experience you are providing is congruent with the learning needs of the participants. Since there are over a dozen different workshop designs included in the elected leadership series, opportunities abound for the creative trainer to take advantage of tools from another toolbox in the series or tools from other sources entirely to enrich the content of another toolbox. In case you haven’t already noticed, the *Reflective Opportunity* exercises in Part I of each of the handbooks can be adapted easily to add to your toolkits.

The opening and closing tools are the same in each toolbox with only slight variations related to the differing subject matter of their respective handbooks. If you plan to use the full series of handbooks, and we hope that you will, these opening and closing tools will become very boring. We apologise for the repetition and encourage you to apply your creative talents to these important segments of each experiential learning event as you move beyond the first event in your series.

The opening tool contains advice on energizing a new group of participants and suggested introductory comments to help a trainer get a workshop off to a successful start. If you plan more than one workshop for elected officials using this series, this

opening tool will definitely need fixing. The closing tool is intended as a bridge to facilitate a crossing from the land of learning things to the land of doing things. One value of the closing tool is to keep participants as they depart ever mindful of the warning contained in an old Russian proverb, “*You cannot buy wisdom abroad if there is none at home.*” This tool can be repeated to provide continuity in the development of a self-administered learning contract.

Finally, we encourage you to plan for programmes that include all the handbooks in the series. As we revised them for this new series, we were amazed at the many ways each of the individual competencies complement others in the series. And of course all of the competencies are integral to the foundation and capstone roles and responsibilities of elected leadership. The exponential learning to be gained from a programme involving all the handbooks is enormous. We wish you and your participants many productive and fun learning experiences.

**Users Note:** Many of the exercises included in this handbook and other handbooks in the elected leadership series have value beyond the customary workshop venue as on-the-job learning tools. Creative use of these tools in conjunction with the day-to-day practice of elected leadership can help elected officials more fully examine, interpret and learn first-hand from their own experiences.

## CONTENTS

A brief description of each learning activity in this toolbox is shown below with an approximation of the amount of time required. You are welcome to change the order of these activities, omit something, or add something of your own to suit your style or the situation.

### **2.1 Getting started/warm up**

Establish a learning climate that encourages active participant involvement with ideas and concepts related to the representation competency and with one another as partners in learning. (60 minutes)

### **2.2 Forms of representation**

Help participants get acquainted with the different ways that elected officials may define their roles in representing the interests of their constituents. (45 minutes)

### **2.3 Taking the political heat**

Give participants an opportunity to analyze the political cost for an elected official to take a position on an issue that appears to violate a campaign promise. (60 minutes)

### **2.4 Critical incidents in representation**

Help participants gain perspective on typical dilemmas that often arise in the process of representation and how they can be managed successfully. (90 minutes)

### **2.5 Balancing advocacy and inquiry**

Provide participants with skill practice in making balanced use of advocacy and inquiry when engaged in conversations with constituents. (60-75 minutes)

### **2.6 The highway bypass decision**

Give participants an opportunity to make a decision that seems to represent the best interests of the community as a whole in the midst of conflicting demands from powerful interests and differing view among the decision makers themselves about whose interests should be represented. (120 minutes)

## **2.7 Planning for learning application**

Give participants an opportunity to reflect on the insights and skills gained from this learning experience and to plan specific ways to use what they have learned to improve the way they perform in their representative roles. (30 minutes)

## 2.1 GETTING STARTED/WARM UP

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### Objective

The intent of this activity is to establish a learning climate with participants that active participant involvement with ideas and concepts related to the representation competency and with one another as partners in learning.

*Note:* It is fair to assume that participants at one of the elected leadership workshops, in most cases, will be strangers to one another. The questions they bring with them include the following: *Who else is taking part? What will we be doing together? What is going to be expected of me?* Your job is to answer these questions at the start of the participants' association with you and with one another. We have prepared some language that covers the major points we feel need to be covered in answering their questions about the program (See the *Suggested Opening Statement* on the next page). You are welcome and encouraged to modify this language to suit yourself and the situation. As for the questions about one another, you might consider any one of a variety of warm-up activities that have the dual purpose of introducing the participants to one another and activating them as learners in a non-threatening way.

**Time required: 60 minutes**

### Process

1. Begin by welcoming those present to this program on the representation role and competency, a component of the UNCHS *Elected Leadership Series*. Introduce yourself and say a few things about your background and experience. Continue with one of the following activities or something that you prefer and feel more comfortable with to get participants acquainted with one another.
  - One possibility is to simply ask for self-introductions, e.g., give your name, where you serve as an elected official, how many terms you have served, and how you hope to benefit from your participation here. A variation on this is to have participants interview one another and then introduce their partners to other participants.
  - Another activity that can be used instead of the former or in addition to it is to ask participants to gather at the centre of the room and then form a line by placing the official who has served the greatest number of years in elected office at the front of the line and the official with the fewest number of years at the rear with the others arrayed by length of service in-between. Self-introductions would follow.

- A third might be to have participants come to the centre of the room and then create a “map” by arranging themselves within the space according to their relative geographic location within their country or countries. Both this and the previous activity can serve for introductions as well as conversation starters.
- 2. When you are satisfied that participants seem to be feeling comfortable with one another and their surroundings, use the following speaking points as an outline for making a five to ten minute opening statement about the training. We decided to offer you the speaking points rather than a script to encourage a more extemporaneous approach. You can add substance to these speaking points by using the material in *Part I* of this handbook and supplementing it with ideas of your own.

### **Speaking points . . .**

#### **. . . about the representation role and competency**

- Representation is your most important and challenging role as an elected leader.
- You represent many competing community interests—economic, social, religious, ethnic, gender and age-related, just to name a few.
- These competing interests often find it difficult to understand the “big picture” that must be your perspective as an elected official.
- There are never enough resources for you to meet all the needs and interests of your constituents, and difficult choices and compromises must be made between long and short-term needs.
- Your support for a project that calls for a long-term commitment of city funds, e.g., for a city bus system, at the expense of short term needs, e.g., paving neighbourhood streets, may cost you some votes in the next election.
- These dilemmas of representation are inevitable. They go with the territory for those who venture into the world of local governance.
- Important representation strategies for the successful official involve building durable partnerships with public and private groups that have the capacity to make things happen in the community.
- Other strategies for success in the representation role involve encouraging participation and decision making at the grass roots by those people who are most closely affected by local government policies and programmes.
- The technique of balancing *advocacy*, saying what you think with power and conviction, with *inquiry*, critically questioning your own reasoning and asking for feedback from the constituents involved, is invaluable for success in mastering the difficult challenges of representation.

### **... about the workshop design**

- Your participation in this workshop is meant to be informative, engaging and enjoyable.
- The content is based on the best available thinking about elected leadership and the representation role and competency.
- The approach to learning is *interactive* and different from the lecture-intensive approaches so often used in training.
- You will be encouraged to say what you think and to share your experiences as a representative with other participants who are doing the same.

### **... about the role of effective participation**

- Listen for understanding and keep an open mind about the ideas and concepts being introduced.
- Say what you really think and ask for clarification when you don't understand something being discussed.
- Challenge viewpoints and assumptions that differ from your own, and ask for the reasoning behind them.
- Commit yourself before the workshop is over to follow through with important new learning when you return home to your elected official responsibilities.

## 2.2 FORMS OF REPRESENTATION

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### Objective

The intent of this exercise is to help participants identify and plan changes in the forms of representation that are most characteristic of them as individual elected officials and of the governing body on which they serve.

### Time required: 60 minutes

### Process

1. Give each participant *Handout 2.2A* that contains two surveys. One survey is for use by participants to identify the forms of representation most characteristic of them *now* and the forms they aspire to in the *future*. The other survey is to do the same for the elective bodies on which they serve. Tell participants they are to work alone on the two surveys and give them 15 minutes to complete the task.
2. When participants have completed the task, assign each of them to a small group. Ask participants in each group to consolidate the results on sheets of newsprint, analyze the results, and agree on answers to the following questions:
  - What do you notice about the individual survey results compared with the results for entire elected bodies? How do you explain the variations?
  - Where are the most significant gaps between forms of representation currently and in the future? What are the implications of this?
3. After about 30 minutes, reconvene the participants. Ask for each group to tape its results to the wall and report on the group's answers to the two questions. Encourage a discussion of the identified gaps and their implications for more effective representation by local elected bodies.

**HANDOUT 2.2A**  
**A REPRESENTATION SURVEY**

**Survey task**

Take a few minutes to complete the attached surveys of current and future practices in the representation role. Both surveys include eight common ways that elected officials perform in their representation role. *Survey No. 1, Representation—Myself*, is for you to use to rate yourself by indicating opposite each of the eight typical representation roles whether you see that role as (1) not at all applicable to you as a representative, (2) somewhat applicable, or (3) very much applicable. Rate yourself first in the three columns to the left that reflect how you see yourself “now.” Then rate yourself in the three columns to the right on how you would like to see yourself in the “future.” Finish by drawing a vertical line down the page connecting the “now” scores and another vertical line connecting the “future” scores. Notice the roles where there the gap is widest between where you see yourself now and in the future. These are the areas where the greatest amount of change in your performance as a represented is needed.

When you have completed the first survey, turn to the *Survey No. 2, Representation—My Elected Body*. Complete this survey in the same way with reference to the elected body on which you are now a member. Again, use the vertical lines to identify the forms of representation that needs the greatest amount of work by your elected colleagues.

## Survey No. 1: Representation–Myself

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*Scale:*

*Where I see myself now:*

*1 = not at all*

*2 = somewhat*

*3 = very much so*

*Where I want to be in the future:*

*1 = not at all*

*2 = somewhat*

*3 = very much so*

<u>Form of Representation</u>	<i>Now</i>			<i>Future</i>		
	<i>1</i>	<i>2</i>	<i>3</i>	<i>1</i>	<i>2</i>	<i>3</i>
<i>Delegate:</i> I express as clearly as possible the opinions of the people I represent and seek to be guided by them in making decisions.	—	—	—	—	—	—
<i>Trustee:</i> I take into account what seems to be best for the community as a whole and then act based on my best judgment.	—	—	—	—	—	—
<i>Elitist:</i> I ignore demands from most constituents and take actions to direct resources to the benefit of upper income groups and the business community.	—	—	—	—	—	—
<i>Universalist:</i> I address the needs of all citizens using criteria of relative need to decide how resources should be allocated.	—	—	—	—	—	—
<i>Advocate:</i> I obtain as much of available resources as possible for my constituents and seek special treatment for them.	—	—	—	—	—	—
<i>Patron:</i> I want to be recognized for delivering special treatment or services for the constituents who have supported me in the past.	—	—	—	—	—	—
<i>Ombudsman:</i> I make it my business to intervene whenever necessary to solve a problem between a constituent and an agency.	—	—	—	—	—	—
<i>Fixer:</i> I take a direct hand in solving problems by taking care of them or seeming to by intervening with staff or overseeing the resolution.	—	—	—	—	—	—

## Survey No. 2: Representation–My Elected Body

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*Scale:*

*Where I see us now:*

*1 = not at all*

*2 = somewhat*

*3 = very much so*

*Where I want us to be in the future:*

*1 = not at all*

*2 = somewhat*

*3 = very much so*

<i>Form of Representation</i>	<i>Now</i>			<i>Future</i>		
	<i>1</i>	<i>2</i>	<i>3</i>	<i>1</i>	<i>2</i>	<i>3</i>
<i>Delegate:</i> We express as clearly as possible the opinions of the people we represent and seek to be guided by them in making decisions.	—	—	—	—	—	—
<i>Trustee:</i> We take into account what seems to be best for the community as a whole and then act based on our best judgment.	—	—	—	—	—	—
<i>Elitist:</i> We ignore demands from most constituents and take actions to direct resources to the benefit of upper income groups and the business community.	—	—	—	—	—	—
<i>Universalist:</i> We address the needs of all citizens using criteria of relative need to decide how resources should be allocated.	—	—	—	—	—	—
<i>Advocate:</i> We obtain as much of available resources as possible for our constituents and seek special treatment for them.	—	—	—	—	—	—
<i>Patron:</i> We want to be recognized for delivering special treatment or services for the constituents who have supported us in the past.	—	—	—	—	—	—
<i>Ombudsman:</i> We make it our business to intervene whenever necessary to solve a problem between a constituent and an agency.	—	—	—	—	—	—
<i>Fixer:</i> We take a direct hand in solving problems by taking care of them or seeming to by intervening with staff or overseeing the resolution.	—	—	—	—	—	—

## 2.3 TAKING THE POLITICAL HEAT

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### Objective

This case study gives participants an opportunity to analyze the political cost for an elected official to take a position on an issue that appears to violate a campaign promise.

*Note:* The case can be used to best advantage in conjunction with *Tool 2.2* which involves participants in a discussion of various forms of representation.

### Time required: 60 minutes

### Process

1. Distribute copies of *Handout 2.3A* and ask participants to read the case. After they have read it, assign participants to small groups of five to seven. Give each small group the task of answering the three questions at the end of the case.
2. After about 20 minutes of small group discussion, reassemble the participants and ask for reports from each group. Encourage a general discussion of *trusteeship*, an exercise of independent judgment on what is best for constituents that may be viewed as deviating from the wishes of the majority.

## THE MINORITY REPORT

In a few weeks, the voters of a medium-sized city are scheduled to consider the merits of issuing bonds to finance what would be that city's first public transportation system. Two previous efforts to pass bonds for public transportation have failed at the polls. The mayor and a majority of the local governing body have reached the conclusion that past failures are due to the inclusion of commuter rail system in the bond package. They favour removing commuter rail service this time and substituting a fleet of small buses as the alternative of choice for getting commuters back and forth to their jobs in a nearby central city. This approach, they believe, is the best way to deal with what they see as strong anti-railroad opposition in the community.

One elected official sees it differently. In her second term on the local governing body, this official strongly supports a public transportation system for the community, a position she shares with a majority of the residents of the district she represents. The removal of commuter rail from the package is a grave mistake in her view. Failure to get started with construction of a commuter rail system within the next five years could jeopardize the city's participation in a region-wide transportation network being developed with funding from the central government. Despite her strong support for public transportation, she is opposed to the "watered down" approach supported by her colleagues on the governing body. After considerable soul-searching about the issue, the elected official casts her vote against a resolution to place the transportation issue on the election ballot without including funding for a commuter rail system.

Six months later, the bond proposal as authorized by the governing body appears on the ballot for voter consideration. It is defeated by a large majority.

### Questions

1. What obligation does the elected official have to make her position known to her constituents before declaring a position on the transportation issue?
2. What risk does the elected official take in declaring a position on the issue that does not seem to agree with her pre-election promises to the voters of her district?
3. What "damage control" would you recommend for the elected official to justify her position on the issue with her constituents?

## 2.4 CRITICAL INCIDENTS IN REPRESENTATION

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### Objective

This exercise is to help participants gain perspective on typical dilemmas that often arise in the process of representation and how they can be managed successfully.

*Note:* Critical incidents are dilemmas that arise from the actual knowledge or experience of participants. They are designed to be believable and common to the experience of everyone taking part. As a rule, critical incidents do not suggest one right answer or solution, and they are likely to cause participants to feel confused and uncertain about what to do. That is exactly what they are supposed to do. Processing each incident should lead participants to become actively involved in analysis and discussion.

### Time required: 90 minutes

### Process

1. Give each participant a copy of *Handout 2.4A* on the next page. Tell them they have 20 minutes to complete the worksheet following the instructions.
2. After 20 minutes, assign participants to small groups and give each group a quiet place to work, a newsprint pad, and some markers. Give the groups about 40 minutes to complete the following tasks.
  - Give each member of the group about three minutes to describe his or her critical incident.
  - Make a list on newsprint of the common failures of elected officials in these incidents to adequately represent the interests of their constituents.
  - Decide on at least three things that might be done by elected leaders in incidents like these to more effectively represent the interests of their constituents and write these on a sheet of newsprint.
3. When participants have reconvened, ask for reports from each group and discuss the similarities and differences in the thinking of the reporting groups.

**HANDOUT 2.4A**

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**WHEN REPRESENTATIVES DON'T REPRESENT**

Take a few minutes to recall a situation that took place during your term as a local elected official, a situation in which there has been a failure of the governing body as a whole or by individual members to adequately represent the interests of constituents. The situation might be one in which a group of influential citizens or an angry mob made charges that the governing body has done something or not done something without giving citizens adequate notice or an opportunity to voice their opinions. When you have a situation like this in mind, make some written notes about it in the space below.

What was the situation? \_\_\_\_\_

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What did the governing body do or not do? \_\_\_\_\_

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Who were the principal stakeholders? \_\_\_\_\_

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How were their interests violated or ignored? \_\_\_\_\_

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What were the consequences of the governing body's action or failure to act? \_\_\_\_\_

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What would you and your colleagues do differently if you could revisit the situation?

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## 2.5 BALANCING ADVOCACY AND INQUIRY

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### Objective

This exercise is to provide participants with skill practice in making balanced use of *advocacy* and *inquiry* when engaged in conversations with constituents.

The value of this exercise can be enhanced significantly if preceded by an explanation of a conversational approach that includes an appropriate balance of *advocacy*, making a convincing case for your point of view, with *inquiry*, asking what other people think and why they think that way. Information on how these techniques can be blended effectively in conversation with citizens can be found in *Part I* of this handbook and in *Handbook No. 2, Communicating*.

### Time required: 60-75 minutes

### Process

1. Give each participant a copy of *Handout 2.5A* on the next page that contains a description of the behaviours practiced by those who are making effective and balanced use of advocacy and inquiry when engaged in conversation with their constituents. If possible, arrange for participants to receive a copy of the handout ahead of time with instructions to read it before taking part in this exercise.
2. When participants have read the handout, have them count off into groups of three. Ask participants in each group to agree on a controversial topic to use as a basis for engaging in conversation, e.g., investment of public funds in AIDS prevention. Two participants, each taking a different position on the issue, engage in a conversation for about 10 minutes on the selected topic, each taking a different position on the issue. For added realism, one participant should take the role of a conservative-minded elected official and the other of an informed citizen possibly in the role of the parent of an AIDS victim.
3. For round one, two members of the group engage in conversation using techniques of advocacy and inquiry as described in the handout. The third member observes the conversation and makes notes on the effectiveness of the conversationalists using an observer's worksheet (see *Handout 2.5B*). At the end of the conversation, the observer feeds back reactions based on the observation. After the feedback phase, the members change roles and complete two more rounds following the same procedure.

4. At the end of the third round, participants reconvene in the large group to discuss their reactions to advocacy and inquiry as a way of establishing better relationships with constituents and building reputations for integrity.

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HANDOUT 2.5A

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## Balancing Advocacy and Inquiry

A common complaint from citizens about their elected representatives is, “*They don’t listen to us.*” If they are honest with themselves, most elected representatives would agree with this criticism. Good conversation is an art. Mastery of the art can be one of the best friends any elected official can have. An important tool for the elected official as good conversationalist is being able to balance *advocacy*, presenting and arguing persuasively for a point of view, with *inquiry*, encouraging others to challenge the point of view being advocated and listening thoughtfully to what is said. In other words, balancing advocacy and inquiry involves making your thinking processes and those of your constituents more visible when engaged in a conversation.

Most elected officials have learned to be good advocates at the expense of being good inquirers. This handout contains guidelines for using both in balance with some sample wording to use when engaged in a conversation with one or more citizens.

### What to say when advocating . . .

- State the assumptions behind your position, and use facts to describe how you arrived at your position. “*Here’s what I think, and this is why I think so.*”
- Explain the assumptions on which your position is based. “*I assumed that . . .*”
- Be explicit about how you arrived at this point of view. “*I came to this conclusion because . . .*”
- Expand on your point of view by explaining who will be affected, how they will be affected, and why. “*If we do this, we know that . . . will benefit . . . because . . .*”
- Provide concrete examples to support your points or hypothetical ones if you are operating in new territory. “*To get a clear picture of what I’m saying, imagine that you’re the homeowner who will be affected by . . .*”
- Trying to imagine your constituent’s perspective on what you are saying.

### How to test your position with your constituent(s) . . .

- Encourage your constituent(s) to consider your facts and assumptions. “*What do you think about what I’m saying?*” “*Do you see anything wrong with this?*” “*What can you add to this?*”
- Avoid being defensive, particularly if a political opponent is present.
- Encourage their input by indicating what you are least clear about in your thinking about the position you are advocating. “*Here’s something you might be able to help me with.*”

- Listen actively, remain open, and encourage others to put forth their views. “*Do you see this differently?*”

### **How to balance your advocacy with a healthy dose of inquiry . . .**

- Help your constituent(s) explore their own reasoning on the topic. “*What is the importance of that?*” “*How does that relate to what you were saying before?*”
- Explain why you are interested in their points of view. “*I want to know more about that because . . .*”
- Test what they are saying by asking them questions that can’t be answered “yes” or “no.” “*How would your proposal affect . . .?*” “*Can you give me an example to help me understand that?*”
- Check from time to time to see if you really understand what they are saying. “*In other words, you seem to be saying that . . .*”
- Listen for new understanding which hopefully moves both of you to a higher level of understanding and appreciation of each others’ points of view.

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## Observer's Worksheet

**Instructions:** During the conversation between your partners, pay close attention to the flow of conversation. Use this worksheet to make some notes on the use that is being made of *advocacy* and *inquiry* by each partner. Be prepared to discuss your observations with them before changing roles.

<u>Partner # 1</u>	<u>Partner # 2</u>	<b>When <i>advocating</i>, how often did this partner:</b>
_____	_____	State his or her ideas or opinions on the subject so clearly that the partner could picture them in his or her mind?
_____	_____	Offer the assumptions on which his or her opinions and ideas are based?
_____	_____	Provide facts, not opinions or anecdotes, to support and illuminate a line of reasoning?
_____	_____	Invite his or her partner to add ideas of his or her own?
_____	_____	Refrain from defensiveness when questioned?
		<b>When <i>inquiring</i>, how often did this partner:</b>
_____	_____	Ask questions about his or her partner's assumptions?
_____	_____	Ask questions which increased the other partner's understanding of his or her point of view?
_____	_____	Listen without judgment, with attentiveness and without interruption as the partner was speaking?

## 2.6 ROLE PLAY/CASE STUDY: THE HIGHWAY BYPASS DECISION

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### Objective

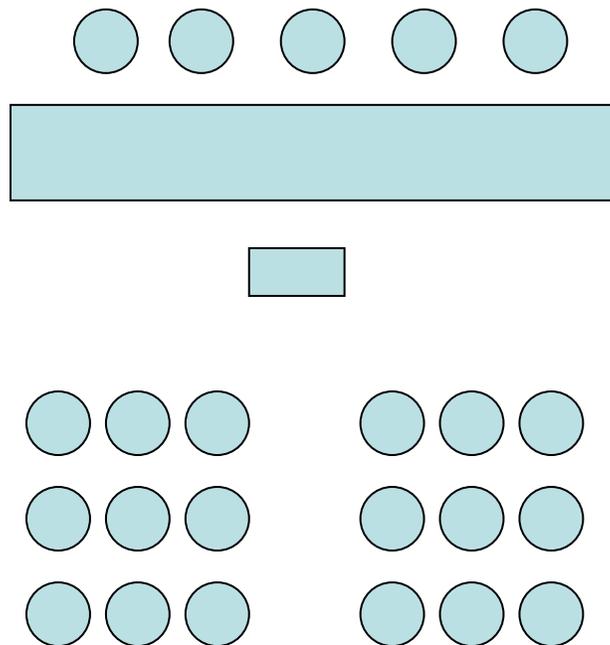
This exercise is to give participants an opportunity to make a decision that seems to represent the best interests of the community as a whole in the midst of conflicting demands from powerful interests and differing views among the decision makers themselves about whose interests should be represented.

### Time required: 120 minutes

### Process

1. Tell participants they will be taking part as role players in a situation concerned with the purchase of land by a local governing body to complete a right-of-way acquisition for a highway bypass. Ask for eleven volunteers to take part in the role playing. Explain that five of the volunteers will assume roles of elected officials on a local governing body. Three of the five officials will be asked to play the roles of *delegate*, *elitist* and *advocate* respectively. Two of the officials will assume *trustee* roles. The other six role players will be asked to assume roles of *naturalist*, *school teacher*, *neighbourhood spokesperson*, *land developer*, *taxpayer's association representative*, and the *city traffic engineer*. Ask participants not playing roles to take parts of interested citizens during a public hearing on the proposed land purchase.
2. Give each participant a strip of paper from *Handout 2.6A* that corresponds to the role each will be playing. **Note:** you might copy on a sheet of newsprint a description of the elected official representation roles from *Handout 2.2A* as a reminder for the five participants playing elected official roles.
3. Give a copy of the situation on *Handout 2.6B* to all participants including the citizen observers. Each person designated to play a role is given a description of the role, and all participants are given about 15 minutes to read the situation and get acquainted with their respective roles. Explain that the governing body's goal is to reach a decision that is best for the community in the long run and to minimize the political cost to the governing body by either reconciling or silencing the competing interests. During this time, ask participants who are not playing roles to arrange tables and chairs for the public hearing as shown in the layout on the next page.
4. The action begins with the elected body presiding at the public. Representatives of the various stakeholder groups and the traffic engineer come forward to make the case for their position on the purchase. Each is

given three minutes. At this point, the hearing is closed and participants playing elected official roles are asked to move their chairs to the end and both sides of the table in order to deliberate face-to-face. (*Note:* normally, the elected body retires after a public hearing is closed to deliberate. For this exercise, however, stakeholders will remain in the room to observe the deliberation process.) In approximately 20 minutes, ask the elected official participants to complete their deliberation. Participants move their chairs back into the public hearing format as they prepare to announce a decision about the land purchase and to offer a rationale for the decision (10 minutes). This concludes the role play.



5. At the conclusion of the role play, ask participants to take a few minutes to return the training room to its original configuration. When this is done and participants are seated again, lead a discussion of the exercise while concentrating on the following questions:
  - What factors were taken into account by members of the local governing body in reaching this decision?
  - How successful was the governing body in staying focused on the “big picture” as it considered the pros and cons of the purchase decision?
  - What forms of representation were being exercised during the governing body’s deliberation and what effect did this have on the ultimate decision?
  - What insight has come from this exercise about a local governing body as trustee of the greater good of the community?

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## THE ROLES

### *Elected official and staff roles*

**Mayor:** Your task is to explain the bypass proposal at the hearing, invite citizens to speak (begin with the traffic engineer) and report on results of the governing body's deliberations.

**Trustee:** Your task is to argue for what your judgment tells you is best for Pleasant Run in the long run even if your supporters judge you harshly for it.

**Delegate:** Your task is to argue for what your district favours; i.e., to preserve the nature space and find some other way to deal with the traffic congestion problem.

**Elitist:** Your task is to ignore the neighbourhood pleading and argue for the bypass as a stimulus for business development and revenue enhancement.

**Advocate:** Your task is to "sell" your vote for the bypass in exchange for governing body support for buying land for a city park in your district.

**Traffic engineer:** Your task is to argue that the traffic counts you have made show that congestion is getting worse by the month and that diverting traffic must be given highest priority especially when the central government is willing to defray some of the cost.

### *Stakeholder roles*

**Naturalist:** Your task is to argue that the wildlife habitat must be preserved. Its equal cannot be found elsewhere in the region and maybe in the entire country. Its destruction will be a regrettable blight on the community and the governing body's reputation forever.

**Teacher:** Your task is to argue that the habitat gives the children of Pleasant Run a unique opportunity to learn about wildlife. Depriving them of this will destroy one of the things that is special and unique about the community.

**Neighbourhood spokesperson:** Your task is to argue that the neighbourhood has enjoyed the open area for many years. You have watched your children grow up playing there. Its loss would do irreparable harm to the community.

**Real estate developer:** Your task is to argue that the site is ideal for a commercial centre. Already there are several tentative business commitments to locate there. The centre means revenue and even jobs. We must stay competitive.

***Taxpayer's association representative:*** Your task is to argue that business expansion is needed to diversify the local tax base and keep taxes low for homeowners. As taxpayers, we simply can't afford to turn down an opportunity like this.

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## THE SITUATION

Pleasant Pastures is a quiet community located in the shadow of a region's booming centre for business and finance. Over the years, Pleasant Pastures and other nearby towns have become home for a growing urban workforce consisting largely of commuters who drive back and forth each day to jobs in the urban centre. The major traffic artery for the region runs right through the middle of Pleasant Pastures, and truck traffic on this artery has nearly doubled in the last decade. Adding this truck traffic to the volume of commuter automobiles originating in Pleasant Pastures and more distant towns brings traffic in town to a crawl for long periods of time at least twice a day.

The central government, aware of the problem, has offered to pay part of the cost to build a bypass highway that would divert trucks and most of the commuter traffic away from Pleasant Pastures' city streets if Pleasant Pastures will pay the remaining cost and provide the necessary right-of-way. Much of the land needed for the bypass is owned by the city. However, one critical piece involves land that for years has been a nature preserve and habitat for certain wildlife. Residents of an old, well-established neighbourhood enjoy the nearby open space as a quiet place for walking and relaxing. Rich in wildlife, the area is used by the schools as a site for teaching children about nature.

The possibility of a bypass being built has not gone unnoticed by other interests in the community. A developer has offered to buy land from the city that would be used to build a commercial shopping centre that the developer claims will bring much needed new revenue to the city. The development idea is strongly supported by a local taxpayers association.

The governing body has been studying the pros and cons of buying the land for the bypass. There are differing points within the body about what to do. A public hearing has been scheduled to give citizens a chance to hear more about the proposal and to say what they think about it.

## 2.7 PLANNING FOR LEARNING APPLICATION

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### Objective

This exercise is to give participants an opportunity to reflect on the insights and skills gained from this learning experience and to plan specific ways to use what they have learned to improve the way they perform in their representation roles.

### Time required: 30 minutes

### Process

1. Take a few minutes to remind participants that the value of their participation in a learning experience like the one just completed cannot be fully realized unless they make a serious effort to make use of what they have learned. Point out that many factors can interfere with the application of new knowledge and skill when engaged in the real work of being a representative. Sometimes the interference comes from outside like ridicule from a colleague about your interest in trying out new ways of doing things. Sometimes the resistance comes from within. Old habits are hard to break. Doing things differently, even things that are clearly important and worth doing, requires time, patience and self-confidence.
2. Explain that one of the best methods known for overcoming resistance to the application of new knowledge and skills is a learning application plan. The intent of the plan is to have people who have just completed a program of learning
  - think about the value of what has been learned and how they will use it to enhance their own performance;
  - consider the barriers to learning application likely to arise and who can be of help to them in overcoming these barriers; and
  - consider how they will determine how successful they have been in putting this learning to use after completing the program.
3. Give participants a copy of *Handout 2.7A* and ask them to complete it as an important step in putting to use in the months ahead what they have learned about themselves and the representation competency.

**HANDOUT 2.7A**  
**Learning Application Plan**

Take a few minutes to reflect on the representation role and competency and the value of this learning experience for your future performance. Then complete each of the following statements as thoroughly as possible.

1. Based on what I have learned about the representation role and competency, in the space below are two or three specific things I plan to do to improve my performance in representing the interests of my constituents:

- \_\_\_\_\_  
\_\_\_\_\_  
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- \_\_\_\_\_  
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- \_\_\_\_\_  
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2. The support I need to achieve these performance improvements, how I expect to get it and from whom, is described below:

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3. Three of the most significant challenges I anticipate when performing in the representation role and competency and my strategies for dealing with them are as follows:

*Challenge No. 1* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
*My Strategy* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Challenge No. 2* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
*My Strategy* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Challenge No. 3* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
*My Strategy* \_\_\_\_\_  
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4. The following outcomes will demonstrate that I have been successful in improving my performance in the representation role and competency:

- \_\_\_\_\_  
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- \_\_\_\_\_  
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\_\_\_\_\_
- \_\_\_\_\_  
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\_\_\_\_\_

5. I intend to do the following things to assess my success after the first six months in achieving the outcomes specified above:

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- \_\_\_\_\_  
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- \_\_\_\_\_  
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