



Minimum Operating Requirements & Guidelines to Establish the *Civic Trust*

THE CITIZENS CAMPAIGN

A Community of Civic Innovators

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PREAMBLE – BRIEF OVERVIEW OF THE CIVIC TRUST. What the Citizens Campaign began as individual tools to empower ordinary citizens has, after significant field testing, matured and developed into a robust offering of legal and political training, expert coaching, and a variety of power tools that empower leadership-ready citizens to work together as “*Civic Trustees*” to improve their cities. Local leaders come together to issue and articulate their individual “Civic Pledges” to work within a collective construct that we now identify as “Civic Trusts”. Operating as localized mechanisms, Civic Trusts are comprised of “leadership-ready” citizens working together in an array of evidence-based problem solving and ‘no-blame policy’ implementation. The Civic Trust model is emerging as an evidence-based framework that has statewide, regional and even national implications...a framework that has the potential to have a longstanding impact in fixing a very broken political and civic system – more directly, a framework for **problem-solvers** and a growing community of ‘civic innovators’. *The narrative herein functions as an executive summary of the essential core requirements and guidelines to establish and sustain the operations of the Civic Trust as determined by The Citizens Campaign.*

THE CITIZENS CAMPAIGN AS THE UMBRELLA ORGANIZATION. The Citizens Campaign movement is a statewide affiliation of local, self-governing Civic Trust affiliates. The Citizens Campaign is a civic empowerment community providing citizens with the tools and training needed to get results to improve their Cities without having to wait for the political establishment. Civic Trust affiliates are united by a common mission to inspire and enable citizens to become responsible, engaged and impactful civic leaders. The Citizens Campaign and the Civic Trust affiliates are guided by four core principles: (1) *each Citizen has the responsibility to leave their City better than they found it;* (2) *no problem should be raised without a commitment to find a solution;* (3) *solutions should be evidence-based and cost-effective;* and (4) *solutions should be advanced with a no-blame approach.*

OPERATING REQUIREMENTS & STANDARDS. The local membership of the Citizens Campaign shall consist of **Civic Trust affiliates** who adhere to the requirements for membership and operating standards established by The Citizens Campaign. When accepted as a Civic Trust affiliate of The Citizens Campaign, the rights and privileges of membership are conferred, including but not limited to the right to be identified with The Citizens Campaign Movement; and the right to receive services from The Citizens Campaign. Civic Trust affiliates assume the obligation to fully comply with all requirements for membership and operating standards adopted by The Citizens Campaign (TCC) along with complying with all applicable federal, state and local laws and conducting its business with the highest ethical standards. In turn, The Citizens Campaign offers Civic Trusts affiliates with comprehensive, high-caliber “Power Platforms” – more specifically, TCC will:

- (1) Administer the articles and provisions associated with the Civic Trusts’ operating requirements and standards.
- (2) Assist with providing the management and staffing support in the initial establishment of new Civic Trusts.
- (3) Provision of networking opportunities and training and capacity building activities associated with effective Civic Trust operations and best practices in civic empowerment. This includes access to various training manual and materials available in text and online form.
- (4) Enable access to TCC’s online forum – “*Citizen Power tool Box*” – which interconnects the Civic Trusts for ongoing learning, exploration and sharing of best practice solutions.
- (5) Provide essential management, legal and policy supports and services to further the purposes of The Citizens Campaign Movement, in particular, through The Citizens Campaign’s (TCC) Law & Policy Task Force, an *expert community of problem solvers* comprised of top government lawyers, urban policy experts and experienced political coaches. TCC helps to facilitate and guide citizen efforts in identifying policy solutions to the issues they care about, and coordinate those interests with the legal and policy expertise of the Task Force. These services are provided on an ongoing basis provided that the Civic Trust maintain its active status in good standing.



Eligibility Requirements. To effectively establish a local Civic Trust, the Citizens Campaign has established a set of threshold indicators that new Civic Trust affiliates must address:

Commitment to Core Values – In identifying individual prospective Civic Trustees and the Civic Trust as a collective entity, the overarching factor for local leaders is complete, unwavering adherence to the four core values stated above.

Recruitment – Demonstrate the ability to recruit qualified applications by gaining applications for at minimum 24 Civic Trustees (may vary based on the size of the community). This needs to be a selective recruitment process that identifies prospective Trustees based on leadership capacity and available time. Civic Trust affiliates must adhere to state and federal anti-discrimination laws in allowing Trustee applicants irrespective of race, color, creed, sex, age, religion, disability, or national origin.

The Civic Pledge – Demonstrate the commitment through the public issuance of the Civic Pledge, i.e., a pledge to principles that define an attractive, solution-focused environment. More specifically, in addition to adherence to the core values, this Civic Pledge also refers to identifying Trustees willing to commit to at least one year as Trustees and completing training associated with evidence-based research and overall capacity building associated with operating the Trust.

The Standard Civic Pledge

I pledge to leave my community and country better than I found them by pursuing practical solutions rather than pointing out problems and assigning blame. Solutions should be: (1) evidence-based, (2) cost effective, (3) beneficial to the community as a whole. I pledge to take a “no blame” approach in order to keep the focus on solutions.

Civic Space – Identify a ‘community-based’ civic space with the operating capacity for maximum productivity and self-sustainability.

City Storytellers – Demonstrate the ability to recruit at least two City Storytellers willing to serve a minimum of a one-year term as well. This enables the Civic Trust to ensure that citizen journalism and vital communication strategies germane to their City are key elements of the Civic Trust. The work of the City Storytellers will also be a vital motivating factor for Civic Trustees along with boosting the credibility of the Civic Trust with government officials.

Name – The identity of the local affiliate must have “Civic Trust” preceded by the name of the City. An exception may be made in the case where a Civic Trust is germane to a specific neighborhood, landmark, and/or similar geographic marker, particularly an affiliate established in a large, metropolitan City. In this case, the words “Civic Trust” can be preceded by the specific geographic designation.

Branding – Civic Trust affiliates will always display the current service mark of The Citizens Campaign on all appropriate electronic and printed collateral materials and comply with TCC’s approved graphic standards. Affiliates are not allowed to utilize the TCC brand or service mark without expressed written consent from TCC.

Intellectual Property – Civic Trust affiliates will stipulate that all know-how, techniques, methods, systems and all other intellectual property and proprietary rights used by TCC during the course of providing services to the affiliate are proprietary to TCC.

Self-Governing – Demonstrate the commitment to work towards sustaining and establishing permanency of the Civic Trust affiliate based on a Trustee-driven, multiple-issue agenda. The Citizens Campaign will allocate essential human, technical and if available, financial resources to work closely with newly established affiliates to realize self-governing status. A key precursor to achieving self-governing status is to ensure consistent activity of the affiliate, in particular, with respect to high retention and activity rates among its Trustees.



Measuring Impact. Civic Trust affiliates will also be asked to participate in evaluation, research and data collection activities administered by The Citizens Campaign associated with measuring the affiliate's performance and impact. When reaching self-governing status, TCC will ask affiliates to submit annual reports measuring at minimum the following metrics:

- (1) Documentation that all Civic Trustees have taken the Civic Pledge;
- (2) Minimum number of 24 active Civic Trustees;
- (3) Realizing a minimum 90% retention rate;
- (4) Minimum 60% of active Civic Trustees will realize improvements in their own individual Civic Well-Being, i.e., increasing demonstrated improvements in their sense of "community" (broader gauge) along with more tangible improvements in leadership activity. This will be measured through a valid survey instrument administered once per year. This sort of assessment speaks to our approach in breeding a new class of civic leaders along with building a sense of 'hope' for themselves in turn for their communities;
- (5) Achieving and adhering to organizational and leadership structural and training requirements;
- (6) Realizing a minimum of one evidence-based solution per Issue Area; and
- (7) Minimum of 8 local media submissions. Submissions' range and vary from photography, social media content, blog content, opinion editorials, news articles, and other similar content.

The metrics are measured over a twelve-month period. A broader, annual "Civic Well-Being" assessment of the Civic Trust collectively analyzed through a valid survey instrument that gauges the most critical civic factors, including indicators associated with our overarching objective of elevating the civic dialogue, will also be conducted. While this broader assessment will review the overall impact of the Civic Trust model in all active communities and will be performed by TCC staff, Civic Trustees will be asked to participate in various assessment exercises, such as focus group sessions, written surveys, one-on-one interviews, and other similar activities.



Running Your Civic Trust

THE CHECKLIST

Overview. With this, Civic Trustees are held equally accountable and have equal amount of say in the organization. With this, key elements of the leadership and governance structure are as follows:

Role & Composition of Civic Trustees

The Number & Composition. The Civic Trust should strive to recruit and accept a minimum of twenty-four (24) but no more than thirty-six (36) Civic Trustees. However, the precise number should be customized to the respective City, particularly in larger Cities with populations of 100,000 or more. Key composition factors at minimum should address: *demographic representation; geographic representation; residential preference; and skill diversity.*

Disqualification of Certain Public Officials. In order to maintain the non-partisan nature of the Civic Trusteeship, Civic Trustees cannot hold public office or run for office while participating.

Term. Civic Trustees should serve a maximum of six consecutive, one-year terms. Previous Civic Trustees will be re-eligible for membership after a lapse of one year.

Powers. The Civic Trust will have all powers and authority for the management of the business and affairs of the Civic Trust. In addition, the Civic Trust will have support and continuous recognition by the Citizens Campaign so long as the Civic Trust and its individual Trustees operate within the principles of their “Civic Pledge”.

Resignation and Removal. A Civic Trustee may resign at any point by submitting his or her resignation in writing to the Governance Coordinator (discussed below). A Civic Trustee may be removed for cause at a meeting of Civic Trustees by an affirmative vote of two-thirds of the remaining Civic Trustees. Trustees being considered for removal should receive at least thirty (30) days notice of such proposed action and should have the opportunity to address the full Civic Trust regarding such action prior to any vote on such removal.

Regular Meetings. Regular meetings of the Trustees should occur monthly on the average of ten times over the course of a calendar year. Recommended guidelines for regular meetings should allow for maximum participation and productivity.

Quorum. A majority of the full number of Civic Trustees should constitute a quorum of the Civic Trustees for the transaction of business.

Meeting Attendance. Trustees are expected to attend all meetings. Failure to provide an adequate response may qualify as sufficient cause for removal from the Civic Trustees.

The Coordinating Committee

The Facilitating Committee helps to make success towards Civic Trust goals possible by providing leadership, guidance and management of the key elements of the Trust, including but not limited to Overall Guidance, Governance/Recruitment, Communication, Legal and Policy Factors, and Issue Area coordination. Key elements are:

Meeting Facilitation. Given the flat leadership structure, there is no Chairperson or vertical hierarchy comprised of executive officers. Instead, the Facilitating Committee will be made up of individual Trustees who serve as “Facilitators” for a defined term and with a set of responsibilities and functions. With this, the Civic Trust will establish a rotating schedule for Coordinators to function as the presiding Trustee to facilitate individual meetings.

Robert’s Rules. In order to conduct business in an orderly and structured fashion while allowing for sufficient input, the Civic Trust should follow the most recent version of *Robert’s Rules of Order Newly Revised [RONR (11th ed.)]*



The roles and responsibilities of the Coordinating Committee are outlined below:

1. *Speakers Task Force* – The Civic Trust’s Speakers Task Force is responsible for overseeing all internal and external communication strategies and activities.
- 2.
3. *Solutions Coordinator* – The Civic Trust’s Solutions Coordinator is primarily responsible for ensuring the identification, priority-setting process, and coordination of solutions-related research is administered effectively.

Issue Committees – The Issue Committees are responsible for leading the fact-finding, deliberative and advisory activities associated with the specific Issue Area as determined by the Trustees. The Civic Trust should ensure that the membership of each Issue Committee is fairly even and balanced with a minimum of 6 members.

Operational Committees – The Trust can also consider forming operational committees to address the primary coordinating functions stated herein, i.e., committees that address Governance, Communication, and Solutions factors. To ensure operational functions are sufficiently addressed, the Civic Trust should establish an average range of 3-5 Trustees per committee.

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Election of the Coordinating Committee

The aforementioned Coordinating Committee should be elected from among active Trustees at each annual meeting of the Trustees and shall serve for one year and until their successors are elected and qualified. This is inclusive of the issue committees based on the mutual identification of the issue areas of focus for the upcoming calendar year as stated above. The operational committee may serve no more than three consecutive one-year terms. Former Operational Committee members, after a break in service of two years, may be elected to another term as a member of the operational Committee. At a regular Civic Trust meeting scheduled at least one month prior to the annual meeting, the Recruitment Coordinator shall collect possible nominations for the Coordinating Committee for the succeeding year. The nominations will be taken only from active Trustees, and the Trustees nominated for the respective Coordinator position will accept or reject the nomination during this meeting. At the annual meeting, Trustees will be able to issue additional nominations from the floor prior to casting their vote. Once nominations are closed, the slate of nominees for Coordinators will be presented to the full Civic Trust. Each Coordinator position will be voted on separately, and casted as a ballot. A group of no more than five active Trustees who are not up for election for any of the Coordinator positions shall tally the votes. In the event of a tie vote for a position, a second ballot will be cast for that position only, with only the tied candidates participating on the ballot. Should a second tie vote occur, a result shall be obtained by flipping a coin with the person whose name is earliest in the alphabet calling a coin side first.



Application, Recruitment & Retention THE CHECKLIST

Overview. The lifeblood of sustaining Civic Trusts and ensuring the effectiveness and impact of their operations is entirely based on recruiting and retaining highly-committed, leadership-ready Civic Trustees. In initiating the process of forming the Civic Trust, it is critical that there is defined plan as to *who* will be targeted and *how* they will be targeted. The “who” is the overarching factor, i.e., to identify and energize a new wave of leadership that is dedicated to the core principles and values of the Civic Trust. A checklist of key factors are:

Forming the Plan – Understanding the “Who”

- ✓ Work towards a numeric goal of Trustees to recruit, i.e., a range based on your particular community.
- ✓ Strive to realize a composition that yields essential diverse skill sets while reflective of the demographic representation of your community.
- ✓ Develop communication messaging and associated tools essential to carry out recruitment activities such as, at minimum, initial and follow-up correspondence to prospective Trustees (print & electronic communications); collateral materials (such as Civic Trust brochure); etc. This includes working with the Citizens Campaign (TCC) to ensure Trustees understand where and how to maximize TCC’s web-based and social media platforms.

Executing the Plan – Understanding the “How”

- ✓ Identify who to contact, and who will be responsible for contacting each group or individual. In this process, research finds that recruitment activities typically occur through “connectors” and “persuaders.” Connectors link people across multiple organizations and groups. Persuaders have credibility within the specific groups Civic Trusts are trying to reach.
- ✓ Identify designated recruitment leaders within or outside the Civic Trust to recruit high priority targets based on their identifications as a “connector” or “persuader.” Individualized, face-to-face meetings should be scheduled.
- ✓ Identify local successful leaders who were previously engaged as Civic Trustees and/or have had prior engagement with the work of the Citizens Campaign to function as recruiters.
- ✓ Recruit through local organizations and sectors.
- ✓ Set forth a regular schedule of cultivation activities that are more individualized and provides the opportunity for prospective Trustees to learn more of the Civic Trusts through varied means, such as small, organized events (such as informational dinners or community lunches, etc.); inviting prospects to observe Civic Trust meetings; organize local public, issue-specific forums, etc.
- ✓ Undertake a steady array of community-based recruitment and educational activities, including conducting small and large group presentations in various localized venues.
- ✓ Work with the Citizens Campaign to integrate broader marketing strategies and platforms administered directly by TCC with local methods coordinated by the Civic Trusts. This includes coordinating a diverse media relations strategy to secure strategic placements in order to connect with prospective Trustees through conventional, digital, social, and other media forms. This includes engaging TCC’s “City Storytellers” to regularly develop and issue relevant media content.



The Application Process

- ✓ Insert application content that speaks to the Civic Trust's primary selection criterion, in particular, to elicit responses that serves as the measuring stick for Civic Trusts to gauge the leadership-readiness of each applicant as well as their commitment to the core values and principles.
- ✓ Allow the application content to form a profile of each candidate and how their prospective membership contributes to the Civic Trust's composition goals.
- ✓ Utilize a streamlined process to review and recommend applicants for membership.

Retention

- ✓ Develop and employ an effective capacity building and evaluation strategy that consistently seeks to improve the contributions of individual Trustees while working towards improving the operations and work of the Civic Trust collectively.
- ✓ Employ recognition activities to regularly and publicly acknowledge the impact, hard work and generosity of the Trustees individually and of the Civic Trust as a whole. Activities can include regular gatherings (e.g., awards luncheon, etc.); media engagement; social media; regular communications, etc.
- ✓ Organize a steady schedule of social and recreational activities among the Trustees to further the trust-building, networking and overall bonding of individual Trustees.
- ✓ Provide regular opportunities for Trustees to network with key external partners and leaders.
- ✓ Institute regular exercises and activities to elicit the opinions and perspectives of Civic Trustees.



Collaborative Problem-Solving THE CHECKLIST

Overview. Civic Trusts are all about *action*, i.e., Trustees working collectively and collaboratively with government leaders and other key stakeholders to identify evidence-based solutions that correspond to the issues Trustees care about. Civic Trusts will form multiple Issue Committees to address specific issues and priorities. Each Committee will assign an Issue Committee Coordinator to assist in facilitating the solutions process. Based on our own lessons learned and research, The Citizens Campaign has developed a step-by-step outline in how to effectively facilitate the identification, assessment and prioritization of community-based issues along with best practices in navigating the ‘solutions’ implementation process:

Step 1: Identify your Issue focus

- ✓ Engage in bottom-up conversation within your Issue Committee to identify consensus passions.
- ✓ Drill down the issue(s) to a discernable problem that you believe you can tackle with a doable solution.
- ✓ Prioritize issues identified; considerations may include internal support (within the group), expected external support (from community and/or administration), timing, difficulty of the problem, scope of problem etc.

Step 2: Submit an OPRA request

- ✓ First, investigate what your City is currently doing to address your priority issue by exploring the City’s website, media coverage, or making phone calls to the City Clerk’s office.
- ✓ Dig deeper by preparing an OPRA (Open Public Records Act) Request either to the City Clerk, or to the Secretary of the School Board; remember that you are requesting *copies of existing records* (e.g. resolutions, ordinances, written policies) so be as specific as possible.
- ✓ Find and submit the OPRA Request Form. Forms should be found on City websites; if not, call the City Clerk and have them email you a blank request form.

Step 3: Conduct evidence-based research* (refer to note below)

- ✓ An internet search is the best place to start! Look up your priority issue to get an idea of how the problem is being addressed in similar communities; look for news articles, policy papers, or websites on the topic.
- ✓ Dig deeper, look into academic institutions including university departments and centers that specialize in the area. Call or check websites of associations whose focus is local government (e.g. Urban Mayors Association) or who deal with your issues (e.g. The New Jersey Association of Environmental Commissions).
- ✓ Review The Citizens Campaign’s Menu of Solutions which contains evidence-based solutions previously developed by other Citizens Campaign participants and Law & Policy Task Force experts.
- ✓ Be sure the solution you choose has been successful in addressing the issue in cities similar to yours.



Step 4: Shape Your solution

- ✓ Use information gathered from the OPRA Request and your Evidence-Based Research to determine which measure may be the best fit for where your City currently is and where you want it to be.
- ✓ Follow-up with appropriate parties (e.g. city clerks and academic institutions) on your identified solutions to get more information on policy implementation, cost of program, challenges, evidence of success etc.
- ✓ Find out what new staff were required in the solution you identified. Also check out how long it took to successfully implement. Then tailor the solution to fit your city.

Step 5: Make sure It Is Cost-Effective

- ✓ Use information gathered from the OPRA Request and your Evidence-Based Research to determine which measure may be the best fit for where your City currently is and where you want it to be.
- ✓ Follow-up with appropriate parties (e.g. city clerks and academic institutions) on your identified solutions to get more information on policy implementation, cost of program, challenges, evidence of success etc.
- ✓ Find out what new staff were required in the solution you identified. Also check out how long it took to successfully implement. Then tailor the solution to fit your city.

Step 6: Do The Doable

- ✓ It's often better to start smaller and gain traction in order to build support and find funds for the overall solution.
- ✓ “Phasing” is a good tactic, especially when full funding is not available.
- ✓ “Pilot” projects are also useful when there is skepticism about your solution.



Step 7: Get Expert Support and Advice

- ✓ Submit your research to The Citizens Campaign in a brief report on (1) the response to your OPRA request, (2) your proposed solution, evidence of its success, and how you think it can fit in your city, (3) your cost analysis.
- ✓ After completing the above research report, consult with The Citizens Campaign and our Law & Policy Task Force to assist with your analysis and the development of your proposal.
- ✓ Incorporate changes suggested by the expert, and conduct any necessary additional research.

Step 8: Draft A Ready To Adopt Solution



- ✓ Ask the Law & Policy Task Force which policy format to choose for your solution, e.g. resolution, ordinance, executive order, etc.
- ✓ Work with support from The Law & Policy Task Force to incorporate the solution you developed into the chosen legal format.
- ✓ Make sure the legal form of your solution includes recognition of the positive aspects of the existing policy and any related governmental initiatives.



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Step 9: Make A Respectful Presentation

- ✓ With assistance from The Citizens Campaign staff and the Law & Policy Task Force, identify the parties you should engage to help get your policy adopted.
- ✓ Review the current policy you found using OPRA and your personal inquiries. Then find what part you agree with, come in complimenting the officials on that part of the current policy and offer to build upon it.
- ✓ When presenting to the public body, compliment them on the progress they've made so far in your issue area.
- ✓ Dress respectfully and address officials respectfully. If you give respect, you can command respect.
- ✓ When speaking to the media, do not criticize public officials who disagree with your proposal. Be understanding of their positions and express confidence that you can work things out.

Step 10: Respectful Pursuit

- ✓ If your solution is deferred for further discussion or review by government committees or experts, say, "Please, may I ask to whom is this proposal being referred and when can we expect a response from this public body."
- ✓ When meeting with an official who makes a commitment to do something, always ask what timeframe they feel comfortable with for fulfilling the commitment.
- ✓ When meeting with an elected official, follow up with a written thank you mentioning the commitments made by the official, the time frame they indicated they were comfortable with for fulfilling the commitment, and if it's an elected official who indicates that a department head or other staff person will act on the commitment, then copy the person on the thank you note.
- ✓ Offer a compromise, if possible, such as a pilot or phased in approach.
- ✓ Ask the Law and Policy Taskforce if there is a way to implement the solution without governmental approval.
- ✓ Keep your solution in the picture by using social media and conventional media and keep it "no blame".
- ✓ Ask for help from a person of influence in your community.
- ✓ Seek a resolution or other support recommending your solution from an appropriate board or commission.
- ✓ Try an Executive Order (if the Law and Policy Taskforce decides it's legal) if there aren't



**NOTE – It is important to note that, if the Issue Committee chooses a ready-to-adopt solution from The Citizens Campaign’s Menu of Solutions, you can skip Steps 3-7 and head directly to Step 8!*