



## TRAINER GUIDE

### I. HOW TO USE THE POWERPOINTS

The Nonprofits Talking Taxes Workshop, “The Common Good in Common Conversation,” is designed as a group workshop that can be held in-person or in a webinar. There are two versions. One version is about 90-120 minutes and the other is much shorter and can be completed in one hour. The difference between them is largely in the number of exercises participants can engage in and the depth of conversation that can be created. The trainer guide also provides details of more interactive exercises offered for in-person workshops that you can mix and match.

### II. LEADING THE WORKSHOP

To use the curriculum to its maximum effectiveness, someone needs to be the workshop leader. This is not a hard job, but we suggest that the leader review the following principles, and that the leader take 30-40 minutes to review the PowerPoint itself and the trainer notes that accompany every slide. The trainer notes on every slide provide clear and detailed descriptions of the concepts to be discussed. They should also take some time to think of how the material relates to their own experiences so they can share anecdotes and encourage others to share theirs.

### III. BASIC PRINCIPLES

In addition to the trainer notes, here are some basic principles for leading this kind of workshop:

- **Create a safe environment where people are encouraged to talk:**  
People often don’t know what they think until they can say it out loud. In this workshop, we want people to try out ideas, to be given permission to change their minds, and to understand viewpoints very different from their own. One of the easiest ways to create an environment where no one is afraid of being attacked is to share your own story. “I used to think ...but now I think...” Or “I sometimes don’t know how to think about this issue...”
- **Remember that some people find it easier to talk in small groups or one-on-ones:**  
You will see that there are several exercises which ask people to get into small groups or pairs. This is to make sure that everyone has a chance to talk and to listen to someone who may not

speak in front of the group. It is important to give these exercises enough time. When people are in these small groups or pairs, give everyone a “heads up” of a minute for them to finish their thoughts before they bring their attention back to you and the larger group. A chime or clapping your hands slowly and loudly can help bring people back into the workshop.

- **There are no completely right or completely wrong answers:**

As the workshop trainer, you don’t have to be an expert in tax policy or the common good to make the workshop a success. Furthermore, what creates, protects, expands, and enhances the common good is not always clear. What protects the common good for one community may not work in another. For example, a question that we sometimes use in these workshops is, “Should dog parks be paid for by taxes?” Surprisingly even people who have dogs will sometimes say no, and people who don’t have dogs may say yes. Some people will think a dog park is a good way to insure that other parks will be free of dogs, which will make them safer for playgrounds and cleaner for everyone. Some people will think that people who want to own dogs ought to bear most responsibility for paying for places they can safely run around. Others will think that a dog park is an important institution in any neighborhood, just like a playground or a library. Not everyone uses those institutions either, but we all think they are important. The workshop leader needs to make sure that each participant feels his or her opinion was listened to with respect, and that participants can disagree without being disrespectful. The outcome is to get as many opinions expressed, questions and dialogue that clarifies a person’s opinion.

#### IV. HOW TO PRACTICE YOUR PRESENTATION

Listed below is a checklist for your practice sessions. Staying aware of these steps will help you give a more relaxed, confident and enthusiastic presentation. Use only the ones that you find helpful.

- \_\_\_\_\_ Read through the trainer notes a few times so you are familiar with the talking points and questions to the group, so you won’t need to “read” them when giving the presentation.
- \_\_\_\_\_ Mentally run through the presentation to review each idea in sequence.
- \_\_\_\_\_ If you are nervous about doing the workshop, consider giving a simulated presentation with a friend, idea-for-idea (not word-for-word) using the PPT.
- \_\_\_\_\_ Practice answers to questions you anticipate from the audience, **but also remember you don’t have to know everything.**

#### V. LISTENING

In the training situation, you must listen *actively*. In addition to identifying the meaning of what the participant is saying, you have two other important goals to achieve while listening:

- To encourage the participant by indicating that he or she has your attention.
- To promote listening by everyone in the group. Listening is an active, goal-directed process that must be practiced to achieve competence.

### 1. To Listen for Meaning:

There is a tendency among trainers to “help” participants answer questions by putting words (hints) in their mouths. The problem with this tendency is that if you do it, you assume that you know what the participant wants to say before he or she has *actually* said it. A more productive approach is to allow the participant to have his or her say first and then to check that you have really understood the meaning by summarizing and repeating back the main points of the answer. This process is called *reflecting (or reflection)*, and it tends to markedly decrease misunderstanding.

### 2. To Encourage the Participant:

While listening to a response, use nonverbal messages to indicate to the speaker that he or she has your attention. The primary way of doing this is to face the speaker and maintain appropriate eye contact. In addition, you can use nonverbal signs of approval (for example, smiles or nods) at appropriate places to indicate you are paying attention and to reward the participant for having attempted to answer. Your physical presence also helps if someone is dominating the discussions- moving closer to them with eye contact, acknowledging their comment and asking them to allow more air time for other people to get their thoughts out, can often be a gentle way to manage the conversation.

## VI. CONDUCTING A DISCUSSION

### 1. Using Questions

at various points in the PowerPoint, the slide notes will direct you to lead a discussion on the topic at hand. In a discussion, you are the guide. You should show enthusiasm for the topic and for participant’s contributions. Often you can generate enthusiasm by asking questions with real curiosity, which also helps reinforce the point that we need to have conversations. Some sample questions:

- Open ended, allowing several possible responses. *“Our taxes pay for the things that we are dependent on everyday- what are a few that you can think of?”* Memory based, so no one can disagree: *What did your parents ever tell you about taxes? ... and “What did you take away from those messages?”*
- Directed initially at the whole group.
- Redirected to individuals chosen randomly if no one has volunteered an answer after several seconds.

## VII. PROBLEMS AND SOLUTIONS IN TRAININGS

### 1. Discussion gets out of control or off the topic.

- Summarize.
- Interrupt and ask a question concerning the topic.
- Use physical movement (i.e. stand up) or eye contact to take more control over the group.
- Use a series of probe questions to relate the material back to the topic.
- Cut the discussion (“thank you” and “let’s move on”) and re-direct to new material.

### 2. Group or individual does not contribute.

- Use a question that you know someone can answer.
- Use simple questions initially, building up slowly to more complex ones.
- Provide rewards for attempted answers. Seek nonverbal cues that indicate interest in the topic, and then invite an interested trainee to comment. (If the trainee is uninterested, he or she is unlikely to feel “on the spot.”)
- On **webinars**, it is more difficult for people to speak up on a call. Encourage people to write their questions or thoughts on the webinar chat room, and if the group is small, simply ask people by name to share brief thoughts, with the opportunity to pass if they do not have anything to share. This helps to get some thoughts out and for people to ask questions also.

## VIII. HANDOUTS

You are welcome to make copies of the PPT presentation for everyone in the training, and you may want to make copies of some of the other handouts that are on this zip drive (and also available on the website: [www.nonprofitstalkingtaxes.org](http://www.nonprofitstalkingtaxes.org)).

1. PowerPoint slides: The workshop slides act more as visual guide to the discussion and in thinking about the care of the environment; we recommend that you do not print out copies unless specifically asked for ahead of time. People sometimes like to have the slides and to write things down- if you do print copies, use the “handouts” print setting, with 3 slides per page. This gives people a visual reference for taking notes. Print back to back to save on paper.
2. There is a 1 page workshop Fact Sheet you can copy and pass out to participants—this was created so that participants are encouraged to have future conversations, using some of the ideas from the workshop to engage co-workers, client/constituents, family and friends. You can encourage them to place it near their desks, on the refrigerator or in their wallets for quick reference when initiating a discussion.
3. If you want participants to have more information about ways to increase revenue in your state, go to the State Fiscal Analysis Initiative, [www.SFAI.org](http://www.SFAI.org) to look for relevant facts and analysis about common good issues in your state budget. The State Fiscal Analysis Initiative brings together nonpartisan, independent, nonprofit organizations in each of 40 states and the District

of Columbia. They share a commitment to rigorous policy analysis, responsible budget and tax policies, and a particular focus on the needs of low- and moderate-income families.

4. Discussion Exercise: “Four Ways to Pay.”

This is a fun exercise that you can use in the workshop to get people thinking about their values and the variety of ways that things we use and benefit from can be paid for. Split people up into group and give them 5- 10 minutes to discuss how they think a particular structure should be paid for. The four structures we include are: dog parks, performing arts, fire protection in high risk areas, and playgrounds. The groups can decide from four different pay options:

- Paid for entirely by taxes
- Paid for mostly by taxes with a small fee for the user
- Paid for in part by taxes with a nominal fee for the user
- Paid for entirely by those who use the structure, with no tax support.

Print out these graphics and insert the exercise in the workshop wherever you feel it is appropriate for your group. (Handouts in a separate document on zip drive.)

Debrief: Ask participants to explore what it was like to be making these kinds of decisions. What personal experience influenced their opinion? Were there very divergent opinions among group members? What was it like discussing how to fund these structures in a group of people? Was it hard to find consensus? Did you learn a new perspective?

5. Role Playing Exercise: Soda Tax Discussion

This exercise requires 10-15 minutes. Print out the role playing cards (included in a separate document on the zip drive) and cut them up, so that you can hand out each role description is on a separate slip of paper. Split up participants into groups of five, and hand out the roles so that each person in the group has a slip of paper with a different viewpoint on a soda tax. Instruct participants to have a discussion in their group, with each person representing the role they were given. If there is time, after some discussion, ask people to switch slips of paper with another person in their group, so that they have the opportunity to represent a different point of view.

Debrief: Ask participants to explore what it was like to have this discussion when everyone had a different view point. What was it like to represent a view point that may have differed from your own? Was it hard to have a conversation where no one exactly agreed? Were group members listening to each other collaboratively or competitively? How does this experience influence your own opinion? How does it experience the way you might express your opinion to others in the future?

Overall, the training doesn't require any handouts and we have generally done it without handouts. The goal is to spark conversation, to encourage people to think for themselves and to de-emphasize the

need to have “expertise” in order to think through what a commons-based society would look like. We believe each person has enough knowledge to contribute in a meaningful way to the conversation.

## **IX. FACILITATING COLLABORATIVE CONVERSATIONS (WHILE AVOIDING ARGUMENTS)**

Many people over the past several years have led this training, in one version or another. In the past three years, almost 4,000 people have participated, mostly from nonprofit organizations in California. We have evaluated the workshop through participant surveys and we know that workshop makes a difference in raising awareness, increasing people’s confidence in having conversations about the commons and prompts further action—such as writing letters to the editor and voting in elections. In these evaluations, many participants have also remarked “the workshop got me to think about my values and taxes, and I had a fun time doing that”. As a workshop presenter, you’ll find that the discussions can be rewarding when people connect the work they do in nonprofits to common good values and see that they can express opinions, agree and disagree, and even think out loud without being judged.

Because we are placing a high value on having a conversation, forming opinions and learning that disagreement doesn’t mean disrespect, we believe that anyone can lead these workshops if they are willing to abide by those understandings also.

From time to time, workshop leaders will come up against a difficult participant. Sometimes these will be people with very firm ideas and sometimes you’ll have participants with lots of knowledge about taxes (such as professional tax preparers). In either case, just acknowledge the participant, i.e., “Mary, you have really thought about this a lot. We find that most people have not and are not as confident in their beliefs as you are. When you look back on your life, how did you develop your thinking?” OR: “I am really happy that we have someone with a lot of actual tax knowledge here today. Maybe you can really help shed some light on the values that drive the creation of tax policy.” When you as the workshop leader note that someone already has done the work you are trying to get the rest of the group to do or that person knows more than you, that person no longer has to prove that to the class. You might also have to ask them to give time and space for others to contribute.

Keep the focus on having conversations, listening to each other and being clear that taxes are a mirror of community values. We know how to form values and how to act from our values.

## **X. THE ART OF CONVERSATION**

Asking engaging questions and listening well to other people’s opinions are critical part of conversations about the commons and they are skills that we reinforce in the workshop. You may not think we need to develop skills in this area, and yet political discussions break down everyday because people stop listening to each other, and they don’t ask questions out of true curiosity, to learn from each other.

When you review the presenter notes in the power point slides, you will find several opportunities to engage people in conversation with you, in pairs and in small groups.

When you use these exercises, notice how open you are to hearing opinions that are different from your own. Know that you do not have to agree or accept that person's position by listening to them fully. Share your own experience and do not expect that they will accept your position or agree with you. When we share and listen for the life experience that shapes those opinions we build the respect and empathy that can deepen the conversation towards common ground and solutions.

If you have any further questions about using the materials, you can contact Kim Klein, ([Kim@kleinandroth.com](mailto:Kim@kleinandroth.com)) who, along with a number of colleagues, will continue to do this work.