

## Appendix C: EXERCISES

This appendix contains a number of exercises that may be useful for communities developing indicators for sustainable forestry and sustainable forestry management. Each exercise is described briefly and instructions are included as necessary. Where appropriate, worksheets are included that can be tailored to the specific circumstances of a particular community.

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### **C.1 Name That Indicator**

This exercise helps participants distinguish between indicators and other items (e.g., goals, issues, and targets) and is particularly useful for communities which are just beginning to develop indicators.

Some of the items below are indicators – a measurement, something to which a numeric value can be attached and for which changes can be reported over time. Some of the items are not indicators but rather issues or problems. Still others are indicators but they have been stated as a goal or target. For each of the items, if it is an indicator, put a check in the box. Otherwise, restate it as an indicator (leaving off the goal).

	<b>Item</b>	<b>Check if ok or reword if not an indicator</b>
1	Percent of land that is forested	
2	Number of private owners in the County	
3	Growing trees	
4	Size of average forest block	
5	Species diversity	
6	Retaining the current forest cover/acreage	
7	Best management practices	
8	Poverty rate	
9	Number of wood processors with state-of-art mills	
10	Education and training	
11	Crime rate	
12	Quality of life	

## Name that Indicator! (Answers)

Here are answers with some possible rewordings for non-indicators or indicators that were stated as a goal. A checkmark (√) means that, as worded, the item is a measurable indicator. If the item is not an indicator as worded, one or more possible indicators have been given that could be used as indicators for the item as originally written. Note that your suggested rewordings may be different. It is important that participants realize that none of the items or the reworded indicators listed are the only 'correct' indicators. They are only suggested here to help participants understand what is meant by the term 'indicator.'

	<b>Item</b>	<b>Check if ok or reword if not an indicator</b>
1	Percent of land that is forested	√
2	Number of private owners in the County	√
3	Growing trees	% increase in forest cover % forest harvested at sustainable yield rate
4	Size of average forest block	√
5	Species diversity	Number of forest dependent species Forest dependent species as % of all species.
6	Retaining the current forest cover/acreage	% of land covered with forest (as stated, it was a goal where the % of forest cover stays the same from year to year)
7	Best management practices	% of forest land certified or registered under best management practices
8	Poverty rate	√
9	Number of wood processors with state-of-art mills	√
10	Education and training	Percent of population with college degree or higher. Percent of population with training in forestry related professions
11	Crime rate	√
12	Quality of life	Percent of local residents reporting high quality of life (based on a survey).

## **C-2. Frameworks for Organizing Issues and Indicators**

As discussed in Appendix B, an indicator framework is a way to organize or categories issues, concerns and indicators to better understand complex systems and to ensure that a project is adequately addressing all aspects of the system, not focusing inappropriately on a subset of the system. A useful exercise using frameworks is to have participants write down all the issues or concerns that they have about their community or the forest resources, and then organize these issues or concerns within a particular framework. The following worksheets can be used in small group exercises or can be done as stations in the Round Robin exercise format described in C-3. The worksheets as written would be used to identify issues, but the column headings can be modified to identify indicators rather than issues.

### C-2a. Montréal Process Framework

In the table below, identify the critical issues or concerns related to your community's forest resources for each of the criteria. If an issue or concern seems to fit into multiple categories, try to identify the specific aspect of the issue that relates to a particular criterion.

<b>Montréal Process Criteria</b>		<b>Issue or Concern</b>
1	Conservation of biological diversity	
2	Maintenance of productive capacity of forest ecosystem	
3	Maintenance of forest ecosystem health	
4	Conservation and maintenance of soil and water resources	
5	Maintenance of forest contribution to global carbon cycles	
6	Maintenance and enhancement of long-term multiple socio-economic benefits to meet the needs of society	
7	Legal, institutional and economic framework for forest conservation and sustainable management	

**C-2b. Community Capital Framework**

In the table below, identify the critical components of community capital for your community's forest resources. First identify those components that are local to your community, then identify those that are either imported or used from a distance – i.e., oil is imported energy, exporting waste to a landfill in another community is using that community's capital from a distance (an ecosystem service – the ability of land to contain waste), customers in other communities are social capital.

<b>Type of Capital</b>	<b>Local</b>	<b>Non-Local</b>
Built Capital		
Social Capital		
Human Capital		
Natural Resources		
Ecosystem Services		
Beauty of Nature		

**C-2c. Montréal Process and Pressure-State-Response Framework**

Using the table below, list issues that are of concern for your community's forest resources, categorizing the issues for each criterion as to whether they are a pressure, state or response issue.

<b>1. Conservation of biological diversity</b>		
Pressure	State	Response
<b>2. Maintenance of productive capacity of forest ecosystem</b>		
Pressure	State	Response
<b>3. Maintenance of forest ecosystem health</b>		
Pressure	State	Response

<b>4. Conservation and maintenance of soil and water resources</b>		
Pressure	State	Response
<b>5. Maintenance of forest contribution to global carbon cycles</b>		
Pressure	State	Response
<b>6. Maintenance and enhancement of long-term multiple socio-economic benefits to meet the needs of society</b>		
Pressure	State	Response
<b>7. Legal, institutional and economic framework for forest conservation and sustainable management</b>		
Pressure	State	Response



### **C-3. Round Robin Discussion Exercise**

#### C-3a. General Description

The Round Robin Discussion Exercise is a useful process when there are a large number of participants and a relatively short amount of time for brainstorming ideas or generating a list of issues or indicators and reporting back in an organized fashion. The basic structure of the exercise is as follows:

1. Participants are divided into 5 to 12 small groups of 5-7 people depending on the number of participants and number of stations.
2. Each group is assigned to a station where there is a topic, question or issue to be addressed and an easel with flipchart pages and markers for writing down responses. The stations are set up around the room with adequate space in between each station to allow groups to converse quietly without distracting other groups.
3. After a certain amount of time (see below for timing), each small group is asked to move clockwise to the next station. (Group 1 moves to Station 2, Group 2 moves to Station 3, ... the last group moves to Station 1.) At their next station, the group spends a few minutes reading what the prior group wrote and then adds their own ideas or makes additions or comments on the prior ideas. Again, after a certain amount of time, each group moves clockwise. (Group 1 now goes to Station 3, Group 2 goes to Station 4, etc). This continues until every group is back to their original station.
4. Once all groups are back to their original station, each group reads all the material that has been written by all the participants and summarizes it to report back to the larger group.

#### Timing

This is generally a fast-paced exercise and works well with 7-9 stations with about 5-10 minutes per stations. For calculating the amount of time needed for the entire exercise, it is important to add 1-2 minutes per station for moving from one station to the next and to add in time for summarizing the work once a group gets back to their original station. The report back time also needs to be added into the final schedule.

#### Things to consider

- It helps to have one person who is responsible for keeping track of the time with a stopwatch (or watch with a second hand) and some audible device (a whistle, chime, bell, etc.) for signaling when it is time to move. This person should not be part of any group.
- Although there is no facilitator at each station, it is useful to have one person who is a roving facilitator to answer questions and to make sure that the groups are staying on task and moving along to the next station when time is up.
- There is a tendency in some groups for 'the person with the pen to wield the power' – that is, if one person is the recorder for a group, that person's ideas tend to take

priority. It is important to emphasize to the large group that everyone has the right and responsibility to get their ideas down on the paper.

- Neatness counts! Since many people are writing their ideas down but one group will be summarizing the results, anyone with unreadable handwriting will not have their ideas included in the final result.
- The timing for this exercise will depend upon the topics being discussed, the number of participants and the number of stations. If the purpose is a brainstorming session, 5 minutes may be plenty for each station. If in-depth discussion is desired, 20 minutes per station may be necessary.
- It is important that the amount of work to be accomplished at each station be similar across all the stations (i.e., it will not work if Station 1 can be completed in 5 minutes but Station 2 takes 20 minutes since the people at Station 1 will want to move on while the people at Station 2 will still be working).
- However, it is generally the case that the amount of time needed per station decreases as groups move through each station since many ideas will have already been written down by preceding groups. For example, if the process starts with 20 minutes per station, towards the end groups may only need 10 minutes per station to read what is there and add a few more comments.
- This exercise is a useful icebreaker exercise if the small groups are organized so that people are not with others who they already know.

### C-3b. Round Robin Indicator Selection Exercise

The purpose of this exercise is to help select a small number of indicators from a larger list of sustainable community/sustainable forestry indicators that reflect community goals, issues and priorities.

Participants are divided into small groups of 5-6 persons. The long list of indicators (community indicators or forestry-related indicators) is divided into several smaller lists of about 10-20 indicators. Each group goes through each worksheet list of indicators and picks up relevant indicators for their community by putting a checkmark in the relevant column (you may decide to pick up about 2-3 indicators from each group or 5-6 from one group and none from another). If Montréal Process Criteria and Indicators are used, it is recommended that participants are divided into 7 groups and there are 7 lists of indicators, each corresponding to one of the seven Montréal Process criteria.

When the groups have gone through all lists, they go back and re-evaluate selected indicators to choose max 10 best/most appropriate indicators (based on the criteria agreed on by the group) and circle these on the worksheet. When each group is ready, one person goes to the lists on the wall and puts a checkmark next to the selected best indicators.

Finally, as a large group the participants review each list of indicators to see what indicators were selected by most of the groups. Large group discussion time allows each group to report back on their selection process as appropriate.

## C-4 Trouble in River City (Selecting and Using Indicators for Different Purpose)

### Objective

The purpose of this exercise is to provide participants with experience using indicators for different purposes – assessing system conditions, policy/program evaluation, determining whether projects or activities are on track.

This exercise can be used as is or it can be tailored to a specific community or organization by modifying the material to be more specific to the group's circumstances. Tailoring this exercise would involve the following steps:

1. Identify a key problem for your community (in this case it is water, but it may be forest health, unemployment, loss of farmland, etc.) and write a brief (one paragraph) description of the local community and the specific problem.
2. Identify existing information and construct a few indicators related to the key issue/problem.
3. Come up with several different groups that represent local interests (e.g., environmental group, economic development group, city council, etc.) Briefly describe each group's position and activities related to the main problem/issue.
4. Create a table similar to the one below, where the columns correspond to the indicators (A, B, ... ) and the rows represent the different interest groups.
5. Remember that the objective is the same as in the sample exercise: to gain experience using indicators for different purposes – to assess system conditions, policy/program evaluation, determine whether projects or activities are on track.
6. As the groups go through the exercise they choose relevant indicators from the list that will help them make better decisions. Each group puts a checkmark in the cell that corresponds to the selected indicators in the table.

<b>Group</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>...</b>	<b>...</b>
1.							
2.							
3.							
4.							
...							

**Objective:**

Have experience using indicators for different purposes – assessing system conditions, policy/program evaluation, determining whether projects or activities are on track.

**Scenario – Trouble in the River City**

Trouble is brewing in River City. The river that runs through the town, for which the town is named, has been getting lower and lower. The river is the source of water for the town's residents and businesses. It is also home to a number of rare fish and mussels. Last year it looked like the river was about to run dry but there was a rainy spell and tragedy was narrowly averted. Attached are some graphs that provide information about various aspects of the water situation.

This exercise will be done in small groups: each group will be given the same set of indicators but each group will be assigned different tasks to accomplish with those indicators. The purpose of the exercise is to see how effective different types of indicators are for different tasks. The groups and their assigned tasks are:

- **Group 1: Save Our River (SOR)** – the local environmental coalition that is concerned about the condition of the river. Some members are primarily concerned about protecting rare species, while others are primarily concerned with the supply of drinking water. This group is developing a campaign to raise awareness and inspire action. Pick three indicators that will be useful in the campaign. Be prepared to state why you have selected these indicators, and to state whether they are system, program/policy, or activity indicators.
- **Group 2: City Council** – most of the town council members have been convinced by SOR that there is a serious problem. This group is trying to decide what policy changes to make. Pick three indicators that will be useful in determining what policy changes to make. Be prepared to state why you have selected these indicators, and to state whether they are system, program/policy, or activity indicators.
- **Group 3: A neighborhood group** that meets on a monthly basis to discuss issues of concern. This month the group is talking about water because one person in the group is also a member of SOR. Pick three indicators that could help households identify actions that they can take to be part of the solution, not part of the problem. Be prepared to state why you have selected these indicators, and to state whether they are system, program/policy, or activity indicators.
- **Group 4: The River City Economic Development Committee** – River City has an unemployment problem in addition to a water problem. This group is making recommendations to the Town Council on a program to attract businesses to the River City Industrial Park. Pick three indicators that are useful in selecting the type of development that will best fit the town's circumstances. Be prepared to state why you have selected these indicators, and to state whether they are system, program/policy, or activity indicators.

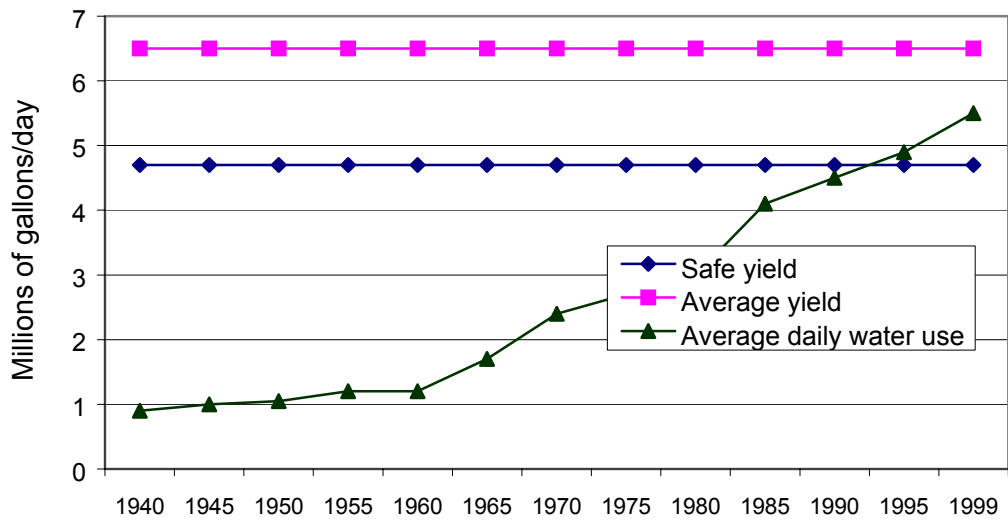
- **Group 5: River City News (one year later)** – the local newspaper is reporting on the success of actions proposed or taken by City Council and the other groups. Pick three indicators that will be useful in showing progress or lack of progress. Be prepared to state why you have selected these indicators, and to state whether they are system, program/policy, or activity indicators.

**Instructions:**

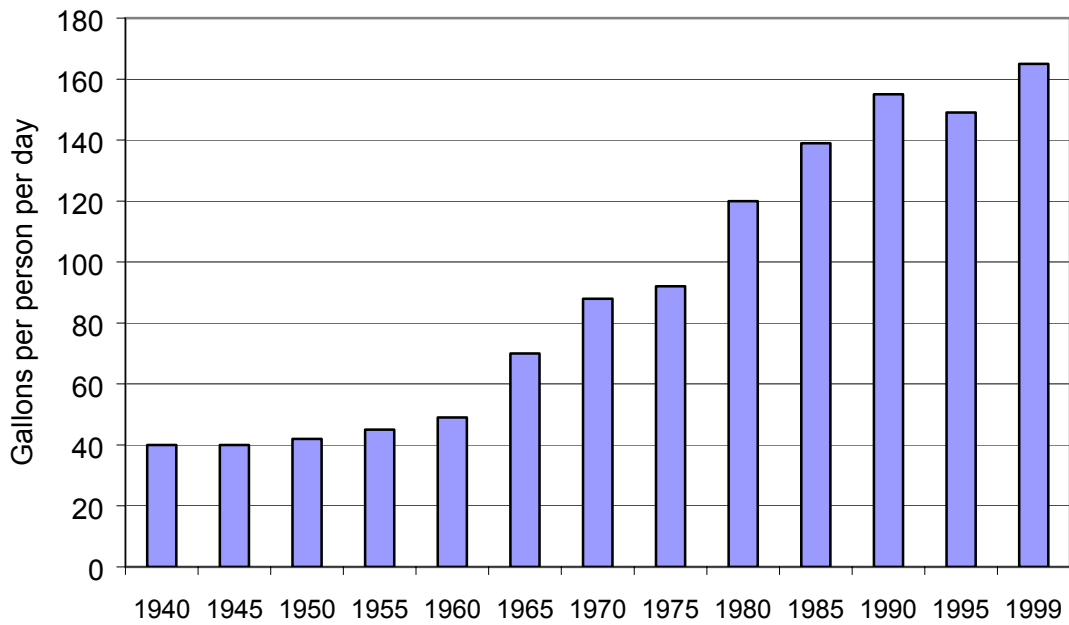
- You have 15 minutes to look over the different graphs and decide which three will be most useful for your group to accomplish its task. For each indicator, be prepared to say which level it is at: system, program, or action indicator. Use the matrix below to record which graphs your group selected. Use “S” to show that the indicator selected is a system level indicator, “P” to show that it is a program level indicator, and “A” to show action level indicator.
- If there is information that would be more useful than the indicators provided, feel free to make up your own charts and graphs using the flip chart. For any new indicator, try to describe where the data would come from, how it would be collected, and who would be responsible for managing it.
- When you are done, send someone up to record your group’s selection on the flip chart page at the front of the room.

Group	Indicators selected							
	A	B	C	D	E	F	G	H
1. Save Our River								
2. City Council								
3. Neighbors								
4. Economic Development Committee								
5. River City News								

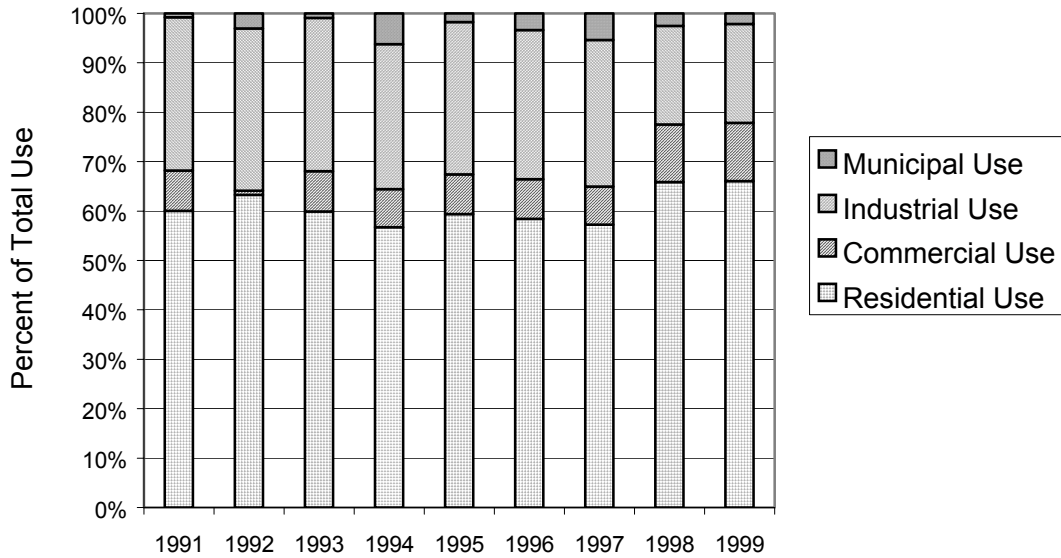
## A - River City Water Use 1940-1999



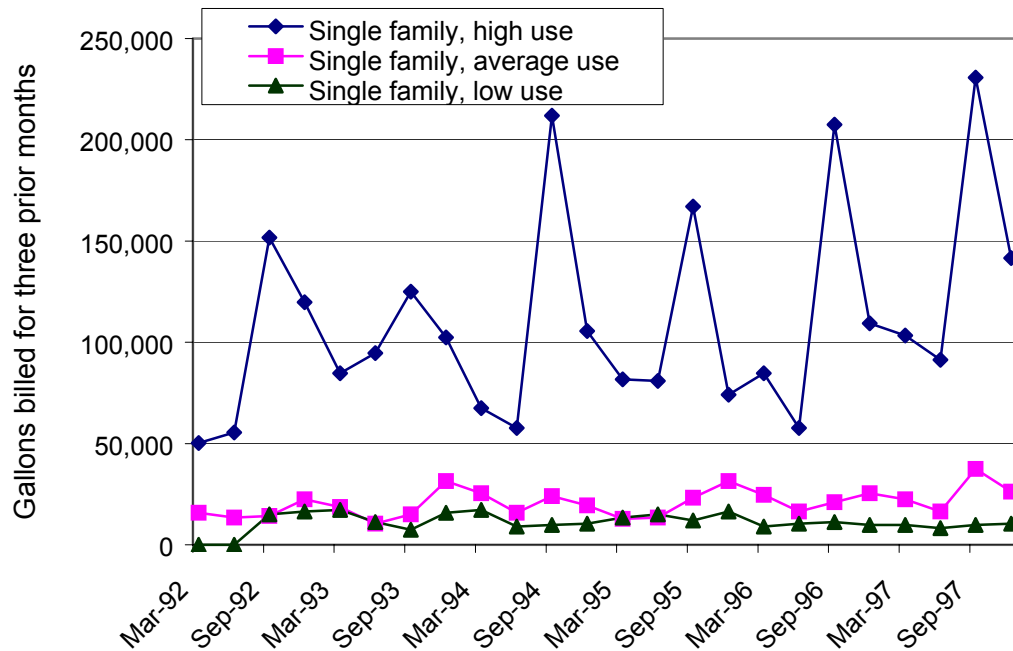
## B - Per Capita Water Use



### C - River City Water Use

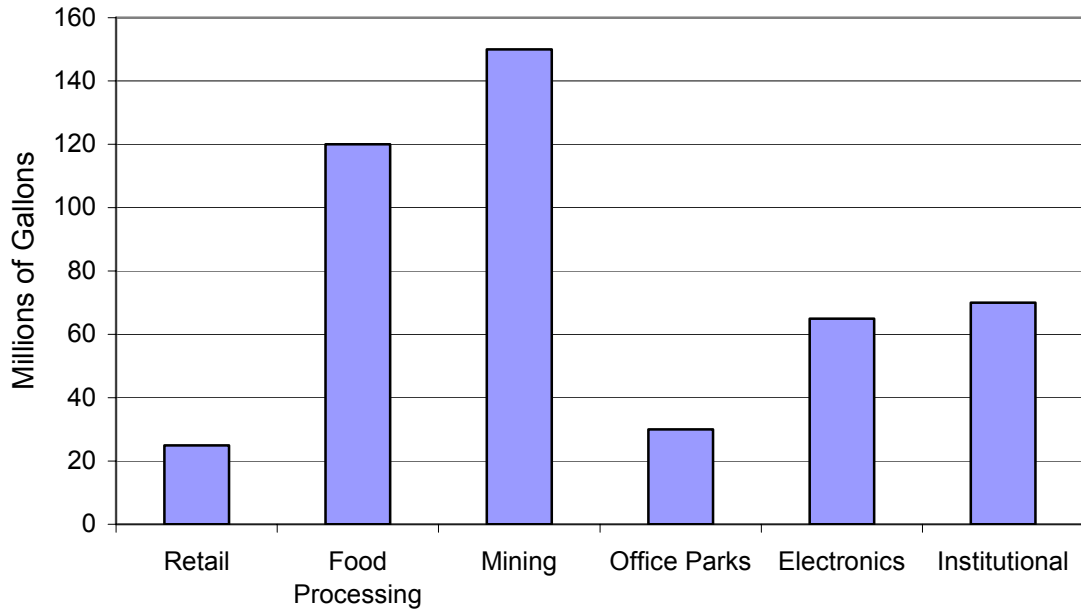


### D - Quarterly water bills for sample households

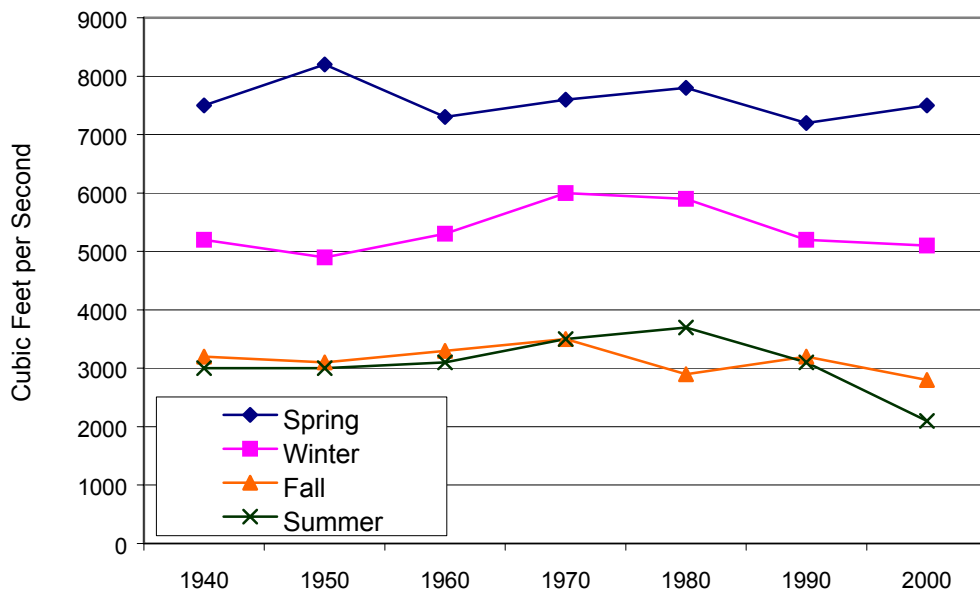




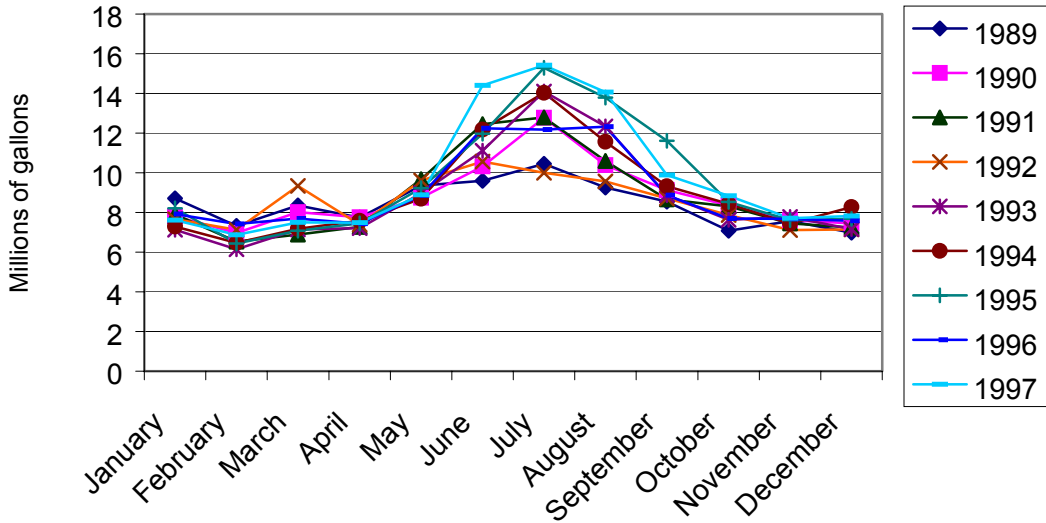
### E - Water Use by Industry (1999)



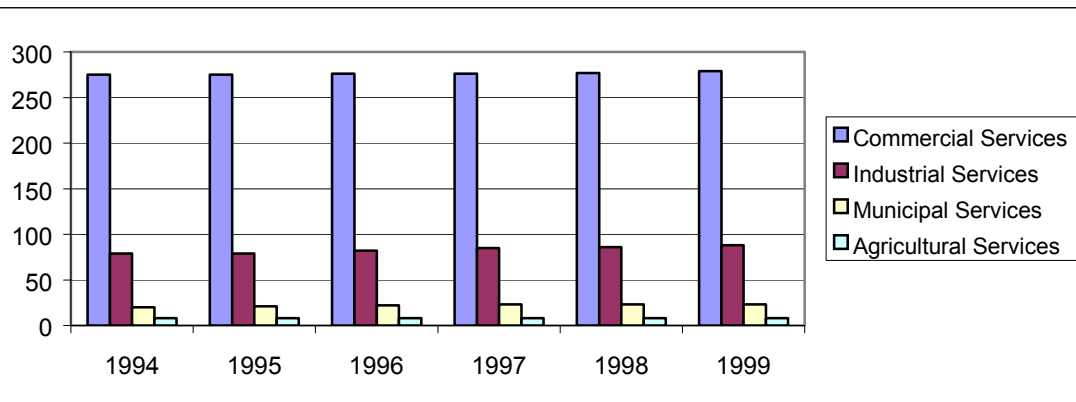
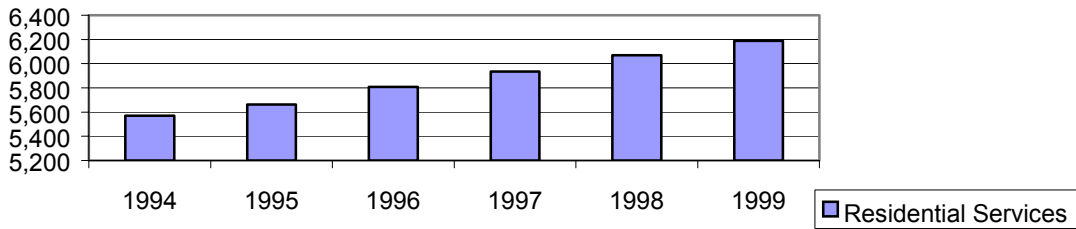
### F - Deep River Seasonal Average Flow Rate



## G - Monthly water withdrawals



## H - Number of water service customers



## C-5 Aligning Vision and Goals to Sustainability

The worksheet can be used for reviewing the extent to which existing vision and goals incorporate sustainability concepts.

Vision:									
In the right hand column below write the potential changes to the vision so that it reflects the sustainability concept in the left hand column.									
Sustainability Concepts									
Long-term balance between economic, social and environmental goals ( <i>look ahead 20-50 years, understand the connections</i> )									
Limits to natural, social, and built systems ( <i>live off the interest of community capital, don't degrade or use it up</i> )									
Inter- and intra- generational equity ( <i>share with future generations and current inhabitants, local sustainability in harmony with global sustainability rather than at expense of others</i> )									
Goal	Criteria for 'Good' Goal					Addresses key concepts of sustainability:			Select?
	Looks to the future	Potentially measurable	Potentially achievable but not automatically	Reflects broad agreement & community values	Represents desired outcomes or community conditions	Link-ages	Limits	Equity	Yes/No

## C-6 Selecting Indicators

### C-6a Useful, meaningful indicators

The worksheet below can be used to select a few indicators for a specific goal based on standard indicator evaluation criteria. Review each indicator and consider it in relation to the specific goal – is it a meaningful measure that is relevant to the goal? Is the indicator understandable and reliable to its audience? Does it provide a systems view rather than look at an isolated part? Can it be measured and is it verifiable?

Goal:	Evaluation of ‘Good’ Indicator						Select?
Indicators	Relevant	Understandable	Reliable	Timely	System View	Measurable	
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							

C-6b Sustainability indicators

The worksheet below can be used to evaluate indicators relative to the three key sustainability concepts.

<b>Goal:</b>	Addresses key concepts of sustainability – relative to goal			Is this sustainability indicator?	Select?
<b>Indicators</b>	Long-term linkages	Limits	Equity		
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					

C-6c Report Back Summary Sheet

This worksheet can be used to summarize the results of the indicator selection by the small groups. List all the indicators and have each group (A, B, C, etc.) put a check mark in their column for those indicators they selected. Once all the groups have made their selection, discuss the results. (Which indicators were chosen by most groups or not chosen by most groups? For which indicators was there a lack of consensus? – discuss why.)

<b>Goal:</b>	<b>Groups</b>					
<b>Indicators</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						

## C-7 Evaluating Indicators in Framework

This worksheet is useful for examining a set of indicators within a particular framework, in this case, the Montréal Process Criteria framework. List all the indicators and then check off which criteria the indicator relates to. It is possible for an indicator to relate to multiple criteria. Once all the indicators have been reviewed, check to see that all the criteria have sufficient indicators. In the example below, there are no indicators for Criteria 7 and Criteria 5 and 6 only have one indicator. This set is somewhat biased towards the first four criteria.

Indicator	Criteria						
	1	2	3	4	5	6	7
Tons of CO <sub>2</sub> released as result of burning wood					X		
Acres of forest in protected area categories	X						
Number of forest species occupying smaller portion of range	X						
Ratio of net growth to removal for wood products		X	X				
Percent of forest damaged by fires		X	X				
Percent of forest area with significant soil erosion				X			
Percent of water bodies with low dissolved oxygen				X			
Percent of GDP from forest-related products						X	

### Montréal Process Criteria

1. Conservation of biological diversity
2. Maintenance of productive capacity of forest ecosystem
3. Maintenance of forest ecosystem health
4. Conservation and maintenance of soil and water resources
5. Maintenance of forest contribution to global carbon cycle.
6. Maintenance and enhancement of long-term multiple socio-economic benefits to meet the needs of society.
7. Legal, institutional and economic framework for forest conservation and sustainable management

### C-7 Evaluating Indicators in Framework

Indicator	Criteria 1	2	3	4	5	6	7

**Montréal Process Criteria**

- 1. Conservation of biological diversity
- 2. Maintenance of productive capacity of forest ecosystem
- 3. Maintenance of forest ecosystem health
- 4. Conservation and maintenance of soil and water resources
- 5. Maintenance of forest contribution to global carbon cycle.
- 6. Maintenance and enhancement of long-term multiple socio-economic benefits to meet the needs of society.
- 7. Legal, institutional and economic framework for forest conversation and sustainable management



## C-8. Creating Principles and Criteria for Sustainable Community Development<sup>1</sup>

This exercise introduces participants to principles and criteria – what they are and how are they developed. The exercise is particularly useful to communities which would like to develop their own principles and criteria for sustainable forestry. For communities that have chosen to use the Montréal Process Criteria the exercise can still be useful because it raises awareness about principles and discusses a slightly different type of criteria than the ones presented in the Montréal process framework. The latter uses criteria more like core principles for sustainable forestry, which identify specific conditions to be achieved for meeting the community's broader goals. This exercise defines criteria in a more general way – as a means of judging or a test by which something can be judged (see below).

**principle** *n.* – a rule of conduct, esp. of right conduct

Sustainable Development principles are rules that a community uses to guide its choices. These principles reflect the key components of sustainable development: living within the limits of community capital; finding the long-term balance between economic, social, and environmental goals; and achieving inter- and intra-generational equity. These principles also provide a foundation for the community's values concerning social, economic and environmental health and well-being.

**criterion** *n.* – a means of judging; a test by which something can be judged

Criteria can be designed to provide means of judging whether a particular choice, action or strategy is compatible with the community's principles for sustainable development. They also may be used to identify ways to revise a choice, action or strategy to make it more compatible with the community's principles. Often, criteria are stated in the form of questions.

When pursuing sustainable development strategies, criteria can help determine which businesses (or types of business) and projects or activities to promote or assist. They also may be used to set standards that businesses and community projects may strive toward to become more compatible.

### Examples

The following examples below are specifically related to business development but could be modified to relate to other community development activities such as infrastructure development.

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<sup>1</sup> This exercise was adapted from the Center for Compatible Economic Development's Workshop on Compatible Business Development

**Principle:** Projects enhance (or do not diminish) the size and condition of key species, natural communities or habitat types

**Criteria:**

- Does the business, industry or project help enhance the size or condition of the local population of key species?
- Does it help decrease the flow of sediment or chemical pollution into the local rivers, lakes and streams?
- Does it help enhance the size and condition of mature forest within the local watershed?

**Principle:** Businesses enhance the long-term viability of the local economy and provide economic benefit fairly to community members

**Criteria:**

- Does the business or industry add value to local resources?
- Does the business or industry use local resources at a renewable rate?
- Does the business or industry create jobs with living wages and benefits?
- Can the business or industry use the skills and abilities of available labor or will labor need to be imported?
- Does the business or industry produce goods or services that benefit community members?
- Does the business or industry purchase supplies or other inputs substantially from individuals or other businesses in the community?
- Does the business or industry contribute to diversification of the local economy?
- Does the business reduce waste generation in the community?

**Principle:** Projects enhance the rural character of community

**Criteria:**

- Does the physical facility (appearance, noise, etc.) complement or enhance the character of the community?
- Does the location of the business and its operation fit well with neighboring land uses?
- Does the business use land that is not prime agricultural or resource land (such as habitat, natural area or timber land)?
- Is the business (owners, management or employees) actively involved in the civic life of the community?
- Does the long-term economic viability of the business require growth or change that is in harmony with the rural character of the community?

## **Principles for Sustainable Development**

Consider the following statements of principles for business development. Which statements reflect the principles of sustainable development? Which do not? For those that do not, how could they be modified to incorporate some sustainable development principles? For those that do reflect sustainable development principles, which of the three basic concepts do they reflect? How can they be improved on? Write your answers below the statements.

- Businesses do not diminish the size and condition of key species, natural communities or habitat types.
- Businesses enhance local retail economy for the community's benefit.
- Businesses can thrive with existing local infrastructure.
- Businesses provide a substantial number of well-paying jobs.
- Business activities are consistent with a healthy environment.
- Businesses use the Internet and are in one of the high growth industries.
- Businesses provide opportunities for local young adults to stay.
- Businesses use local resources in a sustainable fashion to provide high quality products for the global economy.
- Businesses are technology savvy and are proactive about change.

## Criteria for Sustainable Development

A community has selected the following statement as one of its principles for sustainable business development:

Businesses will be compatible with and enhance the rural character of the community.

Which of the following criteria are relevant tests for judging if a new business idea is compatible with the principle? Why or why not?

- Does the business require additional infrastructure (roads, sewer or water lines, large buildings)?
- Will the business generate additional traffic?
- Is the business in a high growth industry?
- Does the business use existing natural resources in a sustainable manner?
- Does the business create new jobs?
- Does the business incorporate new technology in its employee development?

Note that a criterion may be good to use even if it is not relevant to a particular principle. In this case an additional principle may be necessary.

## Exercise – Sustainable Business Criteria

This exercise introduces an approach that can be used by a community-based group to develop sustainable business criteria. Through the exercise you can practice developing one principle and several related criteria, and can “test” the criteria by using them to assess a business or industry. Based on this practice, you can work with your local team or group to develop a set of principles and criteria to guide your business development efforts.

### Instructions

The larger group will be divided into three small groups for this exercise. For all three groups the instructions are the same, however, in Step 3, each group will be asked to apply the criteria developed to different types of businesses – manufacturing, services, and natural resource-based.

### Step 1 – Develop Principles

**1.A. List ideas for principles.** Working individually, have each member review the definition and examples of principles and write one or more ideas for principles below. Think of these principles as operating rules that would determine the types of business that the community would try to grow or develop. Feel free to borrow from the examples.

My ideas for principles:

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**1.B. Record proposed principles.** After each member of the group has had time to write at least one principle, have each member report one of their proposed principles at a time. Record the proposed principles on a flip chart. Continue the reporting until each member has reported all of his or her ideas.

**1.C. Discuss proposed principles.** Take a few minutes to discuss the proposed principles as a group. Ask clarifying questions to ensure you understand each of the ideas. You may consolidate proposed principles that represent the same idea.

**1.D. Select one principle.** Try to reach a consensus within your group concerning one principle to use for the next part of the exercise. Write the principle clearly on a flip chart.

## Step 2 – Develop Criteria

**2.A. List ideas for criteria.** Working individually, have each member of the group review the definition and examples of criteria and write one or more ideas below. Think of these criteria as questions you could use to judge compatibility with the selected principle.

My ideas for criteria:

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**2.B. Report criteria ideas.** After each member of the group has had time to write at least one criterion, have each member report one of their proposed criteria at a time. Record the proposed criteria on a flip chart. Continue the reporting until each member has reported all of his or her ideas.

**2.C. Discuss proposed criteria.** Take a few minutes to discuss the proposed criteria as a group. Ask clarifying questions to ensure you understand each of the ideas. You may consolidate proposed criteria that represent the same idea.

**2.D. Select three or four criteria to test.** Try to reach a consensus within your group concerning which criteria to select. Circle the selected criteria.

## Step 3 – Use and Refine Criteria

**3.A. Select business to assess for compatibility.** Brainstorm examples of actual businesses that are operating, or trying to start up or to locate, in your communities. As a group, select one to consider against your draft criteria.

**3.B. Evaluate selected business.** As a group, discuss how well the selected business (or type of business) satisfies your criteria. What ideas do you have for ways the business might improve its standing against the criteria?

**3.C. Evaluate criteria.** Did the criteria help you in considering the compatibility of the selected business? What ideas do you have for improving your initial criteria?