

Colorado Partners for Sustainable Change

“Getting Started” Workbook

First in a six-step series

Step 1: Getting Started

Step 2: Needs Assessment

Step 3: Strategic Planning

Step 4: Implementation

Step 5: Evaluation

Step 6: Sustainability



Getting Started

Why Start Here? Planning is especially valuable when working collaboratively with multiple stakeholders to develop a comprehensive strategic plan or to achieve community-level change. Often our instinct is to forge ahead and “get something done” so it is not uncommon to question the need for all the planning, meetings, and process-focused work. Having said that, the time taken to pre-plan and get key players participating from the outset will pay off exponentially when you are ready to implement the “action” phases.

This *Getting Started Workbook* is comprehensive and best completed in sequence. Depending on your community, you may already have some of these components in place. If this is the case, simply make note of what exists and move onto the next step.

Using the Workbook

The six sections of this workbook are organized in the same format, and you will see the following headings in each section:

- Action:** Provide an overview of work to consider, or goals to obtain, when forming and working with a coalition.
- Tools:** While the suggested tools may be followed step-by-step, they can also be used “stand alone” for a specific topic in which your existing coalition may need support.

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Workbook Sections

Strategy I: Identify Coalition Coordinator/Facilitator

Action

1. Find a qualified coalition coordinator or facilitator

Tools

- Job Description Sample
- Skill Set for Facilitation Sample

Strategy II: Form a Core Work Group

Action

1. Help recruit members and explain the purpose of the coalition
2. Provide self-reflection about making positive contributions to the process
3. Help core group members achieve consensus about forming the main coalition and the work they intend to do

Tools

- How to Create an Elevator Speech
- What Makes a Great Group Leader
- What Makes a Great Group Member
- Guiding Work for Initial Meeting Tool

Strategy III: Inventory Existing Community Services

Action

1. Ensure group knows what else may be occurring in the community as they think through the work they are undertaking

Tools

- Coalition and Community Scan Tool



Workbook Sections (Continued)

Strategy IV: Engage Key Coalition Members

Action

1. Provide an introduction as to who should be recruited for coalition membership and what will be asked of those who participate
2. Create a list of potential members to engage in the process
3. Track stakeholder motivations and needed resources
4. Provide a template that explains the coalition in order to garner interest among potential members
5. Track contact efforts and assignments

Tools

- Engaging Key Stakeholders Tool
- Membership Examples Tool
- Contact Roster Tool Sample
- Identifying and Understanding Your Stakeholders Tool
- Outline of Meeting Invitation Efforts Tool

Strategy V: Community Change Process and Timeline

Action

1. Use examples outlining steps and timeline for community change work to inform coalition members of the complexity involved in this endeavor

Tools

- Process and Timeline Tools



Workbook Sections (Continued)

Strategy VI: Preparation for Initial Coalition Meeting

Action

1. Provide the core work group with a first meeting guide, which includes tools for mission statement and group goals development, and general coalition tips
2. Provide tools for planning, running, and maintaining effective meetings

Tools

Coalition Tips

- 1) Framing the Process
- 2) Setting the Mission Statement and Goals
- 3) Creating a Structure
- 4) Maintaining & Sustaining Coalitions
- 5) Some Helpful Do's
- 6) Some Helpful Don'ts
- 7) Recognition
- 8) Evaluation

Meeting Tools

1. Running an Effective Meeting
2. How to Plan an Effective Meeting
3. Meeting Agenda Design
4. Meeting Assessment Checklist
5. Meeting Evaluation
6. Coalition Meeting Assessment



Identify Coalition Coordinator/Facilitator

Actions in this Section

1. Find a qualified coalition coordinator or facilitator

Tools in this Section

- Job Description Sample
- Skill Set for Facilitation Sample

Tips for Success

- The coordinator needs to have excellent communication skills and the willingness to put oneself out into the community.
- Ensure the potential hire understands the difference between coalition work and direct services.
- It is best if the person hired is comfortable delegating responsibilities to coalition members rather than trying to do everything him-/herself.
- A coalition serves the community and, therefore, a coalition coordinator must be willing to follow the lead of community members.
- Although it is helpful to have a background in prevention, the key qualification for this position is the ability to organize or mobilize the community.



Sample: Job Description *Coalition Coordinator/Facilitator*

Responsibilities

- Coordinate and chair coalition meetings
- Attend meetings and other activities with fellow coalition members
- Determine additional needs and offer support to coalition members (e.g., note taking, presentation preparation, delegating tasks)
- Serve as a liaison between the community and coalition
- Prepare and present presentations for municipality/councils/advisory boards
- Assist in preparing and submitting community funding applications by stated deadlines, if applicable
- Collaborate with Fiscal Agent to ensure compliance with fiscal requirements, if applicable
- Obtain Memoranda of Understanding from key community leaders
- Serve as a liaison with the Community Coalition as these groups are developed
- Coordinate logistics for orientation, training and other grant-related meetings
- Coordinate and provide facilitation of community meetings
- Ensure compliance with all grant-related reporting requirements, if applicable
- Identify evaluation coordinator, or assume responsibilities for fulfilling evaluation requirements
- Complete other duties as assigned

Qualifications

- Ability or potential to build strong leadership skills
- Ability to work with and value youth in all aspects
- Possesses the following skills:
 - interpersonal communication skills
 - organizational skills
 - community development skills
 - facilitation skills
 - grant management skills
- Ability to be assertive, especially in delegating tasks and following-through with coalition members, who may have picked up tasks where other members left off
- Ability to remain unbiased and impartial; is collaborative and willing to advance coalition interests and efforts rather than one's personal agenda
- Ability to ask difficult questions of the group
- Is task-oriented, accountable and innovative

Professional Background

- A background in prevention, community development, and related issues is encouraged
- Completion of Substance Abuse Prevention Specialist Training, MAPP training, or Public Health training is encouraged



Sample: Skill Set for Facilitation

Platform Skills

Public Speaking
Reflective/ Active Listening
Interviewing Skills
Clear and Readable Flip Charts and Board Work
Eye Contact
Inviting, Affirming Style
Pacing and Timing

Facilitation Techniques

Brainstorming
Cardstorming
Questioning Techniques
Manage Group Dynamics
Graphic Facilitation
Appreciative Inquiry
Dialogue Method

Systems Change

Corporate Planning
Self-Directed Work Teams
Organization design
Organization Development

Participatory Methods

Discussion
Workshop
Group Study
Case Study
Simulation
Role Play
Games
Nominal Group Process
Ground Rules

Process Design

Environmental Scans
Meeting Planning
Process Design
Focus Question
Event Formulation
Event Orchestration
Strategic Planning

Philosophy and Values

Corporate Policy
Organizational Values
Corporate Culture
Philosophy and Mission Statement

Adapted from *Facilitation & Training*
Technology of Participation® of the Rockies,
1997



Strategy II: Form a Core Work Group

Actions in this Section

1. Help recruit members and explain the purpose of the coalition
2. Provide self-reflection about making positive contributions to the process
3. Help core group members achieve consensus about forming the main coalition and the work they intend to do

Tools in this Section

- How to Create an Elevator Speech
- What Makes a Great Group Leader
- What Makes a Great Group Member
- Guiding Work for Initial Meeting

Tips for Success

- Engage key people from the community who are already invested in prevention and who have track records with getting a process “up and running.”
- Keep the workgroup’s focus short-term and temporary with a concrete timeline for having a full coalition in place.
- Use the tools in this section as opportunities to clarify a shared vision that is easy to communicate with others.
- Practice elevator speeches (i.e., role-playing) during meetings. This is helpful in articulating the coalition’s purpose before testing it in the community with potential coalition members.
- Elevator speeches should have a consistent core message so new recruits come to the table with similar expectations.
- Relationships. Relationships. Relationships.
- Coalitions are “two-way streets.” However, leadership should be prepared to give more to members than it receives until coalition members fully understand the benefits and are willing to contribute in return.
- Ensure coalition members understand they will have a role outside of monthly meetings in order to make the coalition successful.
- The first few coalition meetings may resemble orientation meetings to affirm goals and processes. Leadership should be prepared to engage coalition members outside of meetings for two-to-three months so it will not feel like “just another meeting” to them.
- Some coalitions will form with a core group of people, who may phase out once the coalition is stable and new members are recruited to maintain coalition functioning.



How to Create an Elevator Speech

Prospective members often want to know how the time and effort they invest in a coalition will benefit their individual organizations. Anticipating this concern is an essential part of getting new members involved in the effort.

An “elevator speech” is a prepared presentation that grabs attention and communicates a lot using only a few words. As the name suggests, it is presented in the time span of an elevator ride and includes a short description of what you do, or the point you want to make.

The elevator speech provides coalition members with a tool to recruit additional community support by helping to answer the question, **“Why is this worth my time and effort?”** Taking the time to identify the unique benefits that your prevention works offers to each sector of the community will make it easier to get more people involved.

Key question:

- What is the coalition’s realistic, challenging vision of success?

Solicit advice from the leaders of local organizations, the heads of volunteer services in your city/town, and community-minded business leaders. Ask each to help envision a community coalition with a clear mandate, sensible parameters, and a coherent course that includes both immediate and long-term goals. Better yet, invite this core group to an informal meeting to discuss the potential value of a coalition. Gathering the ideas of others will suggest possible directions while giving you an idea of the type of effort that is likely to find strong support in your community.

From there, condense the advice you receive into a one-sentence, common sense description similar to one of the following:

- The coalition will work to make service-learning available to all students attending area colleges.
- The coalition’s goal is to de-normalize commercial tobacco abuse in the region.
- The coalition will encourage cooperation between colleges and the non-profit community through projects that help to prepare today’s students for employment in tomorrow’s workforce.

This description is an important tool for recruiting help, seeking advice, and gathering support. Expect to refine the elevator speech over the first few months as its use with community members will give them context against which to frame their questions and ideas.



What Makes a Great Group Leader?

The way a group is led has a major impact on its success. When asked what they want a group leader to exemplify, coalition members often identify leaders who possess the following values:

Commitment to People

Most group members are highly concerned about relationships and being valued as a participant. If a person feels secure in a group, s/he is more likely to contribute. A good group leader invests time in building and reinforcing the group not only when the group is starting out, but also whenever a newcomer joins.

Desire to Support and Serve

While group members want to see the group leader take charge, they are also strongly motivated by a leader's ability to lead behind the scenes! A group leader who is supportive when other members "take the wheel" is more successful than one who controls, or micromanages, everything.

Enthusiasm, Energy, Inspiration and Expertise

Not surprisingly, group members want to be inspired and motivated by a group leader with the energy and enthusiasm to fire them up. At the same time, they want to feel secure that the group leader has, or has access to, the necessary expertise to lead the group in the right direction.

Willingness to Shoulder Responsibility

Group leaders may find themselves tested when difficulties arise or circumstances do not go as smoothly as anticipated. When challenges arise, as they inevitably will, the leader must take responsibility for addressing them as quickly and effectively as possible. While group leaders are allowed to make mistakes, they should admit errors. Instead of dwelling on what went wrong, a good leader will ensure the group stays on course, recognizing that working through difficulties strengthens the coalition.

Ability to Achieve More as a Group than as Individuals

Groups become most effective once there is synergy, meaning the results achieved by the coalition working together is greater than the sum of their assembled individual capabilities. This requires the group leader to: (1) explore leadership models that involve shared leadership among group members, (2) have an understanding of different individuals' group member roles, (3) establish mutual accountability within the group, and (4) create a group environment that is open, fun, and allows for healthy, productive discussion.

Adapted with permission from *What makes a good team leader?*
Retrieved on August 6, 2003, from <http://www.teal.org.uk/et/page5.htm>.
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What Makes a Great Group Member?

Coalition members who make the most of the group experience and process typically possess the following values:

Commitment to the Group above Themselves

Great group members are service-minded in that they seek to move the group forward more than they seek to advance personal agendas.

Positive Contribution to Group Process and Goals

Great group members provide both suggestions to improve the group process and fresh ideas to help achieve the group's goals. The active participation of group members often leads to shared group leadership, with different members driving the process at different times.

Enthusiasm, Energy, Inspiration and Expertise

Great group members inspire and motivate others. Having a group structure that enables individual expertise and gifts to be recognized and productively used is affirming to group members and encourages their contributions. Everyone shares responsibility for developing and nurturing this kind of group structure.

Willingness to Take Responsibility for the Group's Work

Great group members willingly accept responsibility for major components of the coalition's work., including elements of group development and leadership.

Delivering on Commitments

Individuals committed to the group's success are most valued by the other members. Those who agree to implement action steps must hold themselves accountable for completing their tasks as group members who fail to deliver lose the trust of others. It is in the best interest of the group for members to set appropriate, realistic expectations for their participation rather than agreeing to complete tasks on they cannot possibly deliver.

Adapted with permission from *What makes a good team member?*
Retrieved on August 6, 2003, from <http://www.teal.org.uk/et/members.htm>.
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Guiding Work for Initial Meeting Tool *Engaging the Core Work Group*

Start with a Plan

Certain tasks must be carried out by a coalition, regardless of its type, in order for it to function effectively. These tasks include:

- Recruiting members
- Naming a coordinator/facilitator
- Obtaining commitment from members
- Assessing needs and gathering background data
- Writing a mission statement
- Determining short- and long-term objectives
- Evaluating the work as the coalition progresses
- Exploring opportunities for additional funding
- Implementing the plan using appropriate merchandising and evaluation techniques
- Finding rewards for coalition members

Once potential members are recruited and it is determined there is significant interest, it is helpful to:

- Prepare a letter stating the problem the coalition is being formed to address
- Invite the person/organization to be part of the solution
- Arrange an initial meeting at a convenient time and location
- Prepare an agenda for the meeting

During the first meeting, make a strong first impression. Often this introduction sets the “stage” in people’s minds as to whether the coalition will be primed for success or struggle. For this reason, it is essential to have clearly defined the purpose, goals, and desired outcomes for the first meeting. In other words, know what you are trying to accomplish.

The best meetings are those with a clear set of questions to be answered and an established process that permits everyone at the meeting have a say in answering those questions. At the end of the meeting you should have an agreed upon set of operating principles each representative can then take back to his or her organization.



Strategy III: Inventory Existing Community Services

Actions in this Section

1. Ensure group knows what else may be occurring in the community as they think through the work they are undertaking

Tools in this Section

- Coalition and Community Scan Tool

Tips for Success

- These days there are multiple coalitions operating within communities that have multiple missions. It is important to identify existing supports within a community in order to avoid duplication of efforts. This is especially true when funding requires a coalition.
- If a coalition is formed for the right reasons (i.e., no other coalition exists that could address the issue, the coalition is formed from the community and not just one person or organization, the coalition is linked to real community issues and not just available funding, etc.), it can be highly effective in leveraging resources, building community support for issues, and influencing public policy and norms.
- If a coalition is formed for the wrong reasons, the potential is created for fostering mistrust in the community for these kinds of processes in the future and lead to difficulties sustaining its efforts and membership.
- Use this step to develop a clear idea of what is already occurring within the community. Specifically, look for duplication of efforts, identify possible partnerships, and confirm interest in pursuing this project.
- Combine formal and informal approaches. Use the *Coalition and Community Scan* in conversations with existing councils and key people who are familiar with the community landscape.



Coalition and Community Scan Tool

What is a coalition and will you need to form one?

In theory, a coalition is a group composed of diverse organizations, factions and constituencies, which have come together to achieve a specific goal. A coalition is usually formed in response to a need within the community. Coalitions vary in their purpose, intensity, and duration depending on the community and need. Some coalitions, for example, are formed merely to share information and ideas while others collaborate about on-going programs, to accomplish a particular goal, or to solve an identified problem.

Coalitions are sometimes the most effective way to approach a problem in a community because they can have greater impact than individual organizations.

Coalitions can also develop stronger support for an issue than a single organization by increasing visibility and public awareness.

Initial Considerations

When considering whether to form a coalition, begin by answering these questions:

1. Does a coalition already exist in your community?
 - If so, what is their vision and mission? Does it fit with what you are trying to accomplish?
 - Are the people you want to involve in your coalition involved in the existing coalition? Will membership overlap?
2. Do you think your community needs a (another) coalition? Why?
3. For what purpose would your coalition exist?
4. What would be the coalition's goals?
5. How should it be structured?
6. Will your community support a coalition?
7. How long should the coalition exist?

Criteria for a coalition:

- Ability to impact the issue
- Potential for community-level change
- Supported by data/data-driven
- Viewed as critical/important
- Will be and make good use of resources
- Affects other areas – seen as having a rippling effect
- Collaborative effort (potential for multiple sectors and strategies)



Coalition and Community Scan Tool (continued)

Coalition building is needed when one organization recognizes it alone does not possess the technical capability or people power to have real impact on an issue. Today's issues are complex and audiences are larger. To accomplish a goal, representation must often be broadened to include non-traditional, vested-interest groups that have larger roles in local, state and national policymaking.

Coalition Realities: Benefits and Hurdles

There are many **advantages** to forming a coalition:

- A coalition of organizations can win on more fronts than a single organization working alone, increasing the potential for success.
- A coalition can develop new leaders. As experienced group members move into coalition leadership, openings are created within individual groups. With training, new leaders emerge, broadening the leadership ranks.
- A coalition increases the impact of each organization's effort by providing more information to citizens, interest groups and policymakers. The more people who are involved in the coalition with an understanding of your issues means there are more people to advocate for your group.
- A coalition increases available resources. Additional members can directly benefit your group and coalition members by sharing resources, such as office space, meeting connections, and their established relationships with other groups.
- A coalition broadens your organization's scope by providing groups with the opportunity to work on regional, state or national issues, thereby making the results of your local efforts more effective and far-reaching. As the results of coalition activities are likely to be reported through the media, this may garner more attention for your issues.
- A coalition can build a lasting base for change. When groups unite, each group's vision of social justice and collective social change broadens, thereby weakening the ability of opponents to label the coalition's efforts as those of "special interests."
- A successful coalition is comprised of people who come from diverse backgrounds and different viewpoints. Given this, members must figure out how to respect each other's differences while working to accomplish considerable objectives.

At the same time, there are some **disadvantages** to working in a coalition:

- Member groups can get distracted...
- A coalition may only be as strong as its weakest link...
- To keep the coalition together, it is often necessary to cater to the lowest common denominator...
- The democratic principle "one group, one vote" does not always sit well with groups with...
- Individual organizations may not receive credit for their input...

So when it comes to coalitions, how do we accentuate the advantages and curtail the disadvantages?



Strategy IV: Engage Key Coalition Members

Actions in this Section

1. Provide an introduction as to who should be recruited for coalition membership and what will be asked of those who participate
2. Create a list of potential members to engage in the process
3. Track stakeholder motivations and needed resources
4. Provide a template that explains the coalition in order to garner interest among potential members
5. Track contact efforts and assignments

Tools in this Section:

- Engaging Key Stakeholders
- Membership Examples
- Sample Contact Roster
- Identifying and Understanding your Stakeholders
- Outline of Meeting Invitation Efforts

Tips for Success:

- When recruiting key stakeholders remember: WIFM – “What’s in it for me.”
- There are many components for creating a diverse coalition including people who might not agree with your efforts, various ethnicities and religions, different ages and ideologies, and people who work in the field and citizens who are not involved in prevention.
- Recruitment will probably take more than an email for most people. Make the invitation personal and call the person or ask them to briefly meet in person. This will make a much larger impact than a group email. This is the start of building the relationships!
- Take time to gather a strong coalition from the start and keep recruitment ongoing
- Use the connections of your Core Workgroup to network and recruit members
- Look beyond the usual suspects in your recruitment
- Make sure meeting invitations go out far enough in advance that people can attend the meeting.
- Make it easy for non-traditional members to participate by setting convenient meeting times and locations
- Convey shared ownership at the first meeting and make it clear how valuable each member is to the process
- Along with a meeting invitation, it is helpful to follow up after the initial meeting to thank people for their participation.



Engaging Key Stakeholders Tool

Locate Allies

Your core group can also help identify other people and groups with an interest in education in general, and with volunteerism in particular. The coalition does not need to include everyone or every interest, only those who genuinely want to improve volunteerism and who see the potential value of the group. Your coalition might include five, ten, or fifteen people at the outset. The list may change and grow as you refine your goals and begin to take on projects.

Who Should Be Involved?

Consider the diversity of the coalition members. The goal when creating a coalition is to be as diverse as the community you are serving. Think of organizations and individuals who might be interested in the issue or already involved. Consider organizations that are professionally, politically, demographically, geographically, or functionally interested in the issue. What service professionals could help your effort through in-kind support and be part of the decision-making process such as printers, accountants, media, public affairs folk, graphic artists, writers, etc.?

Consider the size of the coalition. More resources may be needed initially for a larger group and it may take longer to come to a group identity and common purpose. The coalition can grow over time. Initially you need a “critical mass” of sufficient energy to start the coalition and create enough activity or success to attract other members.

Make a list of potential coalition partners. Try to identify stakeholders, formal and informal leaders, and community organizations.

Consider the type of members. The coalition has several decisions to make about its membership. The group needs to decide whether or not to have individual members as well as member organizations. In addition, the right people from the organizations must be recruited; ideally, someone whose membership in the coalition is part of their job and who has the power to act on behalf of the member organization. There will be different layers of commitment. Following are suggestions of the types of organizations to include:

- Local Colleges or Universities
- Student Organizations
- Non-profit Organizations
- Community Service Groups
- Minority or Ethnic Community Organizations
- Elected Officials
- Religious Organizations
- Media Outlets
- Faculty/Teacher Organizations



Coalitions must constantly be maintained and members must be recruited; as some members drop out, new ones must be recruited. New membership will also keep the enthusiasm high. Be sure to develop some sort of orientation process for new members to make them feel involved as soon as possible.

Each member of the coalition will have a separate agenda. Although as a coalition all members should be focused on the same agenda, each member should be aware and sensitive to all the other members of the coalition.

Recruitment

To recruit people to your coalition, you need to pinpoint all the possible organizations that have a stake in your issue. Identify the right people to talk to in each of these groups and then go door knocking.

Once your core group has decided which other groups it might approach, the next step is to prioritize the list of groups. Which one of these groups will need to take just a small step to join the coalition? Which of these groups would have to take a big leap to join the coalition?

Decide which people in your core group could recruit the most likely coalition members. Does anyone in your group know anyone in these organizations? Get a clear commitment from your group members on who they are willing to visit. Role-play what you are going to say in these visits. Remember you need to offer the group you are asking to join your coalition something that they see as in their self interest.

Pick a date by which all first-round visits will be done. It may help to first choose a meeting date on which the first round of prospective coalition members can meet. Put together a timeline that allows you time to visit each group at least a few weeks before the initial coalition meeting date.

If groups join a coalition, what are they promising? Troubleshooting problems as an ongoing effort increases the chances for successful coalition building. The following rules for commitment should help keep all groups on the same track.

- Each organization must be committed to the problem
- Each organization must be committed to solve the problem, not just gain public recognition
- Each organization must be committed to the belief that every other organization has the right to be involved
- Each organization must be committed to open communication
- Each organization must be committed to coalition recognition, not individual recognition



Membership Examples

<p>Government Elected Officials Mayor or City/County Council Substance Abuse Prevention Substance Abuse Treatment Department of Public Health Local Health Departments Community Health Clinics Department of Recreation Driver's Licensing Agencies Public Works Department Armed Forces – All Branches Other: _____</p>	<p>Businesses/Employers Businesses Employing Underage Youth Fast Food Movie Theatres Amusement Parks Retail Alcohol Industry Bars Restaurants Liquor Stores Beer Distributors Liquor and Wine Wholesalers Insurance Companies Chambers of Commerce Labor Unions Arenas Record and Video Sales Media Television Stations Radio Stations Newspapers</p>	<p>Education Education (K-12) School Superintendent(s) Principal Prevention Coordinator(s) High Schools Middle Schools PTA Organizations School Resource Officer(s) Colleges and Universities Administration Student Affairs Resident Managers Substance Abuse Prevention Judicial Review Campus Police Fraternities/Sororities</p>
<p>Judicial Community Prosecutors/County/City Attorneys Judges Juvenile Court Judges District/Adult Court Judges Juvenile Justice System Admission/Intake; Family/Parent Education; Probation Probation & Parole (18-20 year olds)</p>	<p>Law Enforcement Community Chief's Office Local and State Police/Sheriffs Alcohol Unit/Traffic Safety Unit Community Relations/Affairs Alcohol Beverage Control Agency</p>	<p>Youth and Youth Organizations SADD Organizations Boys and Girls Clubs Boy Scouts/Girl Scouts YMCA 4-H Clubs Substance Abuse Prevention Groups Religious Groups/Faith Organizations</p>
<p>Health Care Community Hospitals/Trauma Centers Physicians Pediatricians Medical Associations Nurses Emergency Dept. Physicians and Nurses Health Maintenance Organizations Health Insurance Companies Emergency Medical Technicians and Paramedics</p>	<p>Community Parent Groups Faith Community Citizen Activist Groups MADD chapters RID chapters Civic Groups Kiwanis/Lions/Rotary Junior League Other: _____ Neighborhood Associations Minority/Cultural Organizations</p>	



Identifying and Understanding Your Stakeholders

Stakeholder	How will they be involved or affected?	What criteria will they use to judge our success?	Why are they important to us?
Example: Superintendent of schools	Responsible for the education of youth	Success in improving academic achievement	Knowledge, resources (space, volunteers, grant writing skills)

Worksheet created by: Karen Abrams, CSAP’s Southwest Center for the Application of Prevention Technologies, College of Continuing Education, The University of Oklahoma, 2003.



Outline of a Meeting Invitation

When creating an invitation to attend a coalition meeting and/or to recruit new members here are some things that should be included:

- Purpose of the project
- Goal of the project
- How they were selected as a potential stakeholder/member
- Why the project needs them to succeed
- The level of commitment expected for participation
- Why their participation is crucial for the success of the effort
- Schedule and location of the meetings
- Number they can call for questions (or email)
- Reminder to send in the postcard (RSVP)

Some other things to keep in mind include if a potential stakeholder does not respond they should be contacted by a member who knows the person. Personal phone calls or in-person contacts are always helpful in getting people to commit their time and effort to the coalition.

Also, if there are any individuals who have been (or felt) left out, ignored, or unsuccessful in community efforts, may require a different approach to gain their commitment to the process. Many times, face to face contact by members or by trusted individuals is required to gain participation. Be creative; take the time to enlist all important participants.



Strategy V: Community Change Process and Timeline

Actions in this Section

1. Use examples outlining steps and timeline for community change work to inform coalition members of the complexity involved in this endeavor

Tools in this Section:

- Example Process and Timeline Tools

Tips for Success:

- Address the balance of “Process” and “Action” from the outset. Convey the importance of both in a successful project
- Whenever possible, include research and rationale behind the Process and Timeline
- Share success stories and best practices from other communities
- Different people might be involved in the first year than in the following years.
- Although it may take one year to reach strategy implementation, there are still plenty of tasks to do in the first phase of the project.
- Celebrate small successes along the way!



Example Process and Time Line

Adapted from Communities that Care Training, 2007

Time line

Something similar to the following timeline should be given to the coalition members in the beginning to help inform people about the type of process and timeline for the work before they commit. It is always best to know what to expect rather than have unrealistic expectations.

6 months – 12 months:

- Assess readiness of the community and mobilize the community
- Assessment of community indicators and resources
- Develop a community prevention plan

1 year – 1 ½ years

- Implement tested, effective prevention strategies

2 – 5 years

- Decrease in prioritized data areas

3 – 10 years

- Increase in positive community development
- Reduction in problem behaviors

10 – 15 years

- Vision for a healthy community



Strategy VI: Preparation for Initial Coalition Meeting

Actions in this Section

1. Provide the core work group with a first meeting guide, which includes tools for mission statement and group goals development, and general coalition tips
2. Provide tools for planning, running, and maintaining effective meetings

Tools in this Section

Coalition Tips

- 1) Framing the Process
- 2) Setting the Mission Statement and Goals
- 3) Creating a Structure
- 4) Maintaining & Sustaining Coalitions
- 5) Some Helpful Do's
- 6) Some Helpful Don'ts
- 7) Recognition
- 8) Evaluation

Meeting Tools

- 1) Running an Effective Meeting
- 2) How to Plan an Effective Meeting
- 3) Meeting Agenda Design
- 4) Meeting Assessment Checklist
- 5) Meeting Evaluation
- 6) Coalition Meeting Assessment

Tips for Success:

- Make it a goal that people leave the first coalition knowing it was a valuable use of their time
- Facilitating a successful meeting means carving out plenty of time for planning and preparation.
- Bring energy and enthusiasm to your first meeting. This will set the stage for your efforts.
- Encourage input on the issue from participants during the first meeting. Be prepared to validate personal stories.
- Make sure every voice is heard. This might require calling on the quiet members and facilitating more vocal members.
- Keep members active (but not too active). There is a fine line between keeping members engaged with responsibilities an overloading their already full schedules.
- Recognize members often. The coalition and its members should be attributed with success and the coalition coordinator should allow that to happen (even if much of the work is completed by the coordinator).
- Meetings should start and end on time and be productive.
- Don't overload agendas...it is easy to do.



Coalition Tips

Framing the Process (At the First Meeting)

First impressions are strongest, and your first meeting can set the stage for success or struggle. For this reason, it is important to have clearly defined purposes, goals, and desired outcomes for the first meeting-know what it is you're trying to accomplish.

The best meetings are those with a clear set of questions to be answered and an established process that lets everyone at the meeting have a say in answering those questions. At the end of the meeting you should have an agreed upon set of operating principles that each representative can take back to his or her group.

1. Bring interested groups together. Carefully select those groups that will be invited to meet together. Identify yourself as the first meeting facilitator in the initial call or letter. (It is anticipated that a facilitator will be elected at the first meeting. You may wish to make that clear to those attending when you write or call them.) Ask each individual to come prepared by bringing their address card file, appropriate newsletters, organization membership books that include their mission statements and plans for action, and telephone books to find agency phone numbers.
2. Prepare a written agenda. Tell people what you will be doing at the first meeting, who will be speaking on what topic, and how long the meeting will last. Attach a list of invited participants.
3. Describe the problem. Early in the meeting have a speaker accurately and succinctly describe the problem in your community that the coalition will address. Choose a speaker who can speak with authority and do so in a compelling manner. This is the speech that will convince others to join your effort.
4. Work through a team building exercise. Pair those attending with someone they do not know. Ask them to introduce themselves briefly by telling the other person at least one and no more than three groups they belong to, and a skill or talent they have. Ask each pair to introduce their partner using the other person's name, where that person is from, groups the person belongs to, and a skill or talent the person possesses. Comment on the number of groups mentioned, the various skills named, and how this is a beginning to build an effective coalition.
5. Solicit their involvement. Once informed, it is time to solicit their participation in the effort, whether they want to do a one-time project or collaboration, develop an individual on-going partnership, or commit to forming a coalition. Ask them if they want to help and what form that would take. It is helpful to openly discuss the pros and cons of each of these strategies, as well as other potential problems that could arise by forming partnerships and coalitions.



6. Ask them to make a specific commitment. One way to get involvement is to ask for a specific commitment. Ask them what their group could do on its own to help the effort, without additional outside resources. Or, you may want to give them a list of suggested programs they can do within their own groups; and, ask them to commit to adopting one or more of them.
7. Develop a mission statement for the coalition. Begin to outline the mission of this coalition. The facilitator may need to further develop the statement and send it to attendees for comments at the second meeting.
8. Elect a facilitator for future meetings and develop an agenda. Identify who will continue as facilitator. The facilitator should offer to invite other organizations to join in the coalition at the next meeting. When inviting groups to join the coalition, define the issue in a way that appeals to their self-interest. Make committee assignments to coordinate an agenda for the next “real” meeting of the coalition.
9. Follow-up after the meeting: stay in touch. Rapid follow up after the first meeting will convey the right message—that you are serious about this work, time is of the essence, and you want their group to stay involved.
10. Send a brief summary of the first meeting. Attach an attendance list, decisions made about involvement, the list of commitments each group made, and a reminder of the next meeting date and location. You may also want to send some program ideas. If time permits, call attendees to thank them for attending and ask what they thought of the meeting. It is extremely important in the beginning to stay in touch. Don’t just say “good-bye” at the first meeting and not speak with them until the second one. That’s the quickest way to lose new members.

Setting the Mission Statement and Goals

Whether at the first meeting or a subsequent meeting, once the decision is made to form a coalition, you need to develop a written statement about this new entity. This document should spell out the purpose, goals, and mission statement for the coalition.

Begin by explaining that coalitions are successful at accomplishing many goals that reach beyond the ability of any single member. Describe various functions a coalition might serve. A coalition can have a number of functions: information sharing, coordination of services, community education and awareness, and advocacy. Then pose the questions: For what purpose does this group exist? Write down their responses and decide which to adopt.

Next, set some goals for the coalition. What does this group specifically want to achieve?

Third, develop a mission statement. The mission statement should be short, simple and specific. It should combine aspects of the purposes and goals already listed, and written in a way that clarifies



the purpose of the group, and guides and focuses your organization through its growing pains. The mission statement will eventually be used to educate and persuade the community, the media, and future coalition members about your purpose and cause.

Finally, choose a couple of activities that have a likelihood of early success. This will help get the coalition going and strengthen them for the more difficult tasks. You need to make the members feel good about their participation in the group by actually accomplishing some stated goals.

Creating a Structure

At some point after the coalition formation, you must decide how the coalition will make decisions, develop working or standing committees, and determine its leadership. At a minimum, the coalition needs to have a steering committee and make a decision about who the spokesperson(s) will be for the coalition.

One way to brainstorm about which working groups or committees to form is to create a wish list of projects to undertake. Following are some ideas:

- Develop a speakers' bureau to increase public awareness, target specific groups to educate and potentially recruit members to the coalition. The speakers' bureau could be directed by one of the service organizations or a combination of the individuals.
- Create a long-range marketing/promotion plan integrating existing activities and new ones suggested by coalition members. The plan may include special events to increase public awareness, gain publicity, and increase volunteerism.
- Target private sector and businesses to join the coalition.
- Solicit money for coalition activities or other programs that the coalition feels are important. This may also include cash and in-kind contributions. This committee may also create a generic sponsorship package and wish list.
- The coalition can establish its priorities from the wish list and develop committees from the final list of projects the coalition wants to do. Each individual can choose one or several committees on which to work.

Maintaining Coalitions

There are several things you can do to help maintain interest and participation in the coalition:

- Communicate to or make sure that each member is communicated to about the activities of the coalition: newsletters, conference calls, mailings, regular meetings, etc.
- Share power and leadership.
- Address coalition trouble early. Acknowledge problems, do not be in denial.
- Hold regular meetings of the entire coalition and other meetings with a purpose.
- Perform evaluations and assessments.
- Recognize and reward achievement and successes; hold award ceremonies.
- Remember to say thank you often.



The following will help sustain a coalition.

- Stay focused on your mission.
- Keep the demands on members simple and realistic.
- Develop clear roles and expectations for members.
- Provide ongoing opportunities for members to interact socially within the coalition.
- Focus on the assets you have to work with and to the deficits that you face.
- Encourage members to see the coalition as a resource that can help them do their job more effectively.
- Plan activities that demonstrate the impact of your group.
- Give recognition to coalition members as often as possible.
- Legitimize the need for each individual to reevaluate their role periodically.
- Look for ways to recruit new members.

Some Helpful Do's

- Be inclusive. Do not limit the types of organizations and individuals to approach for membership.
- Understand the needs and concerns of each prospective member and organization. Make sure everyone understands what you are trying to accomplish and how you think they can help. Larger organizations usually need time to plan and include coalition activities within their current work. Do not expect everybody to drop everything to join your coalition.
- Be patient. This seems to be a recurring theme, but a necessary one.
- Be very clear about the roles and responsibilities of the coalition. People need to understand what is expected of them. They can help develop a work plan, but that should be included in their roles and responsibilities. Ambiguity only leads to confusion and this can cause people to drop out of the coalition.
- Develop specific activities. The best way to keep people involved and motivated is to give them responsibilities to fulfill and make sure their tasks are short and sweet.
- Ask for ideas, suggestions, and help. When asking for help and assistance, the organizer or leader needs to be a facilitator, not a speaker. That individual also needs to make sure all coalition members offer their views, and that people who might be shy are called upon to give their opinions. Keeping track of every suggestion is also important. Make sure that everyone's opinions and views are counted. The facilitation process should lead to members "buying in" to the coalition's goals, because people feel their contributions are valued.



Some Helpful Don'ts

- Don't be demanding. Appreciate everyone's contribution.
- Don't be impatient. Democracy works, but it takes time.
- Don't be confusing. State plans clearly and concisely.
- Don't lecture. You are not in a classroom
- Don't waste time; people's lives are too busy.
- Don't forget reminders. When sending out a meeting notice, follow up with a phone call the day before the meeting to remind people.
- Don't forget newsletters, minutes, and regular up-dates.

Recognition

One of the most frequent problems in coalitions involves the giving and receiving of credit. At times, the fighting and jockeying over who gets recognition for what often seems petty. Some may feel that this is something that groups need to be cured of, and that the proper attitudes will make it go away. But quite to the contrary, these problems are rooted in a basic survival instinct. They will never go away, nor should they.

An organization's ability to raise money, recruit members, build power, attract staff, develop leaders, and fulfill its mission depends on the amount of public credit it receives, particularly in the media. Coalitions that lose sight of "giving credit where credit is due" do not last long.

When the issue of the coalition is of secondary importance to a particular member group, then the issue of giving credit is less of a problem. But when the issue of the coalition is also the main issue of the member group, then the issue of giving credit is a thorny one. The coalition's strategy needs to be structured so that there are actions the affiliates do jointly as a coalition, and others that the coalition helps member groups do in their own names. Groups join coalitions to gain power, not to give it away.

Evaluation

There are several questions to ask of the coalition on a regular basis, at least once each year. The same questions should be asked after work is completed on each project. Does the coalition work well and is it effectively reaching its goals? Were there unintended results of coalition efforts? Were they positive or negative? Be open to the possibility of dissolving the coalition, some cannot be repaired. Evaluation is critical and an on-going process.



Meeting Tools

Examples of the following tools can be found on subsequent pages.

1. Running an Effective Meeting

- How to prepare for the meeting, develop an agenda, things to consider when facilitating, concluding and following the meeting, and some effective meeting characteristics.

2. How to Plan an Effective Meeting

- Some questions to think through before you hold a meeting.

3. Meeting Agenda Design

- Template to follow for designing a meeting agenda that includes pre-meeting tasks, time estimates for items, who is responsible for what, etc.

4. Meeting Assessment Checklist

- A checklist to complete to ensure well-run meetings, realistic expectations and increased productivity for the group.

5. Meeting Evaluation

- Examples of ways to record participants' comments at the conclusion of a meeting.

6. Coalition Meeting Assessment

- An assessment tool to allow coalition members to voice their opinions of how well the group is functioning.



Running an Effective Meeting

Preparing for the Meeting

- Define the purpose, objectives, and outcomes**
What do you expect to result from this meeting?
- Determine what type of meeting is necessary (face-to-face, conference call, etc.)**
Not every meeting needs to be face-to-face. Consider the logistical needs of meeting participants and the functional needs of the meeting.
- Set time and place based on mutual availability**
When and where is best for the majority of meeting participants?
- Select meeting participants**
Make sure all of the key players are a part of the process.
- Make invitations**
Participants should receive a formal written invitation. Additional personal invitations to key participants can also ensure meeting success.

Developing an Agenda

- Develop a thorough agenda**
A well-constructed agenda keeps the meeting on task and moving. In developing the agenda, you should also consider the most appropriate forms of participation (i.e. brainstorming, small group work, large group discussion, etc.). Ideally, the agenda should include the following:
 - Meeting time
 - Date
 - Location
 - Who called meeting
 - Purpose and desired outcomes
 - Agenda items
 - Desired outcomes for each agenda item
 - Persons responsible for each item
 - Time allotted to each item
 - Required materials and necessary preparation
 - Breaks
 - Ground rules



Disseminate agenda and necessary materials in advance of meeting

Participants should have a copy of the agenda and meeting materials far enough in advance so they can prepare for the meeting.

Facilitating a Meeting

Opening the Meeting

Start and end on time

Punctuality counts when people are on a schedule.

Do introductions and provide nametags or table tents if appropriate

A meeting is greatly enhanced if you assure that everybody knows each other's names. People do not like to admit they have forgotten somebody's name, so nametags and tents assure that names are not a problem.

Establish expectations

Restate the purpose, objectives and outcomes for the meeting.

Review and revise agenda

Give participants a chance for input on the content and process of the meeting before you begin.

Assign roles

Take time before or at the beginning of the meeting to recruit a facilitator, recorder, note-taker and other roles as needed.

Determine what notes should be taken and to whom they should be sent

Notes serve three primary purposes: providing information for people not attending, keeping an historical record, and recording action steps. Decide which of these is relevant and take notes accordingly.

State ground rules

State up front what the parameters of the meeting (i.e. decision-making process, group authority, conduct, budget constraints, etc.)

Encouraging Participation

Utilize participation techniques

How can the collective ideas and insights of meeting participants best be gathered?

Maintain meeting focus

Keep participants on time and on task.

Develop action steps

Identify specific actions to be taken, who will take them, and by when they will be completed.



Concluding the Meeting

- Review action steps to be completed**
Who is going to perform action steps? When will action steps be complete?
- Final comments**
Give participants a chance to provide closing comments on the content of the meeting.
- Discuss need for additional meetings**
Is another meeting in order?
- Set dates, times and agenda items for the next meeting**
If possible, set meeting schedule for the long term to assure more complete participation.
- Assess meeting**
Get constructive critiques of the meeting and integrate recommendations into the process of the next meeting.

Following the Meeting

- Send out minutes in a timely fashion**
Make sure everybody who needs it has a record of the meeting.
- Follow up with key people who were not in attendance**
Who else needs to know about what happened in the meeting?
- Follow up with people responsible for action steps**
Friendly reminders and support help get the job done.
- Send out thank-you notes or calls to meeting participants**
Showing your appreciation for input lets others know the value of their participation.

Excerpted from *Tools for Comprehensive School Health Programs: Running an Effective Meeting* (pp. 1-3) with permission from the Wisconsin Department of Public Instruction, 125 South Webster Street, Madison, WI 53702; 800/243/8782. Retrieved December 2, 2003, from <http://www.dpi.state.wi.us/dpi/dlsea/sspw/pdf/effectivemeeting.pdf>



Effective Meetings Have the Following Characteristics

Desired Outcomes

- They are clear and agreed upon by members.

Agenda

- The process, content, and timeframe are clear. The agenda is prepared. The group agrees on the agenda.

Clear Roles

- Everyone's role is clear. People know what is expected of them.

Preparation

- Participants, leaders, and presenters are well prepared.

Room Set Up

- The room and seating arrangements support the meeting purpose.

Decision-Making Power

- Power issues and decision-making procedures are detailed ahead of time.

Unbiased

- The meeting leader shows no bias and is perceived as being neutral, fair, and firm.

Total Involvement

- The meeting leader involves and fully engages each meeting participant.

Real Issues

- The real issues are on the table and are honestly faced. Hidden agendas are brought into the open.

Process Tools

- The leader has good facilitation skills to help the group achieve its goals.

Diversity

- Diverse opinions are sought out and respected.

Responsibility

- Each participant takes responsibility for the success of the meeting.

Accountability

- Who, what, and when regarding items needing action are clearly established and assigned to group members with a completion date.

Evaluation

- At the end of the meeting, participants indicate that the meeting was a good use of their time.

This tool authored by: Vicki Thomas Corlett,
Prevention/Organizational Consultant, Human Potential, Ft. Collins, CO, 1999.



How to Plan for an Effective Meeting

Can you answer these questions?

- Why are you having a meeting? What are the goals and/or expectations
- What type of meeting will it be? Planning? Problem solving? Information sharing?
- Who should attend?
- What kind of involvement and participation do you want?
- How many people will be included?
- Where are you going to meet?
- What is the most effective room arrangement?
- What roles/responsibilities should individuals have during the meeting?
- Who will have the power and authority to make decisions?
- What methods and techniques of discussing, planning, problem solving and decision making are you going to use?
- How much time do you have?
- Will you provide refreshments?
- Do you have a sign-in sheet, including space for contact information?
- Will there be an agenda?
- Will there be presentations? What equipment will you need?
- Will there be some kind of record of what took place at the meeting?
- What are the desired outcomes of the meeting?
- How are you going to determine tasks, deadlines and responsibilities?

Adapted from *Communities for A Drug Free Colorado: A Community Team Training* [Participant training manual], p. 165, by Communities for A Drug Free Colorado. Training conducted May 1–4, 1988, Colorado Springs, CO.



Meeting Agenda Design Sheet

(for shared responsibility)

Purpose of the Meeting:

Desired Outcomes or Goals:

Ground Rules:

Meeting Type or Combination of Types:

Date, Timeframe and Location:

Pre-meeting

Time Estimate	Activities/Preparation	Person Responsible	Needs
1.			
2.			
3.			
4.			

During Meeting

Order of Agenda	Person Responsible	Process	Time Allocated
1.			
2.			
3.			
4.			

Facilitator_____ Recorder _____ Note Taker_____

After Meeting

Follow-up actions: (Who? Will do What? By When?)

- 1.
- 2.



MEETING ASSESSMENT CHECKLIST

Often people come to meetings prepared to take action. If people do not feel heard or the meeting is not well run, you risk losing members of your group. Good preparation and a well-run meeting will help set up realistic expectations and increase productivity and satisfaction. Conducting periodic evaluations will help you analyze and improve the effectiveness of your meetings. Use this checklist to aid you and your members in the evaluation process.

Meeting was Properly Planned

- Members were notified in advance in a timely manner of the meeting and location.
- There was a prepared agenda.
- Officers and committees were ready to report.
- The meeting room was pre-arranged.

Meeting was Organized

- The meeting started on time.
- Guests were introduced and welcomed.
- Agendas were available for all members.
- The purposes for the meeting were made clear.
- There was a transition from the last meeting.
- One topic was discussed at a time.
- One person had the floor at a time.
- Discussion was relevant.
- Chairperson summarized the main points of the discussion.
- The meeting moved along at a reasonable pace.
- Committee assignments were complete and clear.
- Plans for the next meeting were announced.
- All that was planned for the meeting was covered.

Participation in the Meeting

- Members participated in discussion and voting.
- The chairperson responded to questions.
- The pros and cons of all issues were considered.
- Members gave suggestions to committees.
- Responsibilities were evenly distributed.
- Members participated in planning the agenda for the next meeting.



MEETING ASSESSMENT CHECKLIST (cont.)

The Value of the Meeting

- Progress was made toward goals.
- Something was learned.

Attitude of the Meeting

- Attendance was good.
- Everyone was on time.
- Members were acquainted with one another and new members were introduced.
- There was a “warm up” period before the meeting.
- There was some humor during the meeting.
- Members and officers helped one another when needed.
- There was an atmosphere of free expression.

Adapted from “Meeting Evaluation Checklist” in *Running Effective Meetings*.
Retrieved August 29, 2003, from the University of Michigan, Student Activities and Leadership,
Guidelines & Resources site: <http://www.umich.edu/~saled/resources/>



Meeting Evaluation: Recording Participants' Comments

One of the simplest ways to evaluate a meeting is to record participants' comments on a flip chart, using two columns. Three examples are listed below:

Learnings/ Insights	Changes

Highlights/ Why	Tough Spots/ Why

Pluses	Wishes

From *Facilitation Guide for People in Prevention—Beginning the Journey* (p. 44),
by L. Walker, (in press), Norman, OK: Center for Substance Abuse Prevention's
Southwest Center for the Application of Prevention Technologies,
College of Continuing Education, The University of Oklahoma.

Committee Meeting Assessment

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Purpose and Instructions

This assessment tool is an opportunity to voice your opinions of how well your decision-making group is functioning. It examines four areas: *Task* and *Process* in group dynamics, the creative use of constructive conflict, and how effectively the group is delegating responsibilities and doing its work between meetings.

Please express your views openly: if you and your colleagues know what the members of the group think about its operations you will be more likely to have an effective and participatory decision-making and action-oriented group.

When all group members have entered their scores (from 0 - low to 10 - high) for each of the items, these scores should be entered on the Group Assessment Report Summary for study and discussion leading to improvement of the group's functioning.

Task

A group's task is the stated purpose or outcome of the group's interaction: the *what* of its activities, its results.

Group <i>Task</i> Items	Score 0 - 10
1. <i>Clear objectives</i> – members know why they are meeting and what they hope to achieve.	
2. <i>Focus on outcomes</i> – members demonstrate commitment to the group's outputs.	
3. <i>Achievement of results</i> – the group achieves its objectives in a timely and effective manner.	
4. <i>Sharing the load</i> – the group's workload is distributed fairly among its members.	
5. <i>Learning from experience</i> – the group systematically evaluates its results and applies lessons learned to improve its output.	

Process

A group's process is the way it goes about its business, the *how* of its workings. This aspect of a group's operation is a key to its success.

Group <i>Process</i> Items	Score 0 - 10
1. <i>Common Purpose and Principles</i> – the group's principles and purpose are shared and overt.	
2. <i>Role Clarity</i> – roles are clearly defined and understood by all members.	
3. <i>Climate</i> – group members trust and respect each other, and hold each other in high esteem; they are unified and supportive of the group's decisions.	
4. <i>Consultation</i> – members express their opinions freely and fully, and with moderation.	
5. <i>Listening</i> – members feel they are listened to and their comments have an influence on the group's progress.	
6. <i>Self-discipline</i> – members avoid giving or taking offense.	
7. <i>Detachment</i> – when a member expresses an opinion, it then becomes the property of the group, and when a differing opinion is expressed, it is seen as another contribution to a shared exploration of the issue.	
8. <i>Conflict</i> – when there is conflict, this is seen as a clash of opinions which serves to shed light on the issue being discussed, rather than a clash between the people who voiced them.	
9. <i>Order</i> – there is shared responsibility for ensuring participation; when the group at large fails to maintain order, a designated member of the group uses his/her responsibility to keep things on track, and the group's decisions are clearly defined and recorded for action.	

Constructive Conflict

The constructive and creative use of conflict is essential for organizational survival and growth, particularly in diverse and turbulent contexts.

Constructive Conflict	Score 0 - 10
1. Members <i>value their diversity</i> and recognize the creative potential in constructive conflict. They look for opportunities to voice their different views, discuss frustrations and work to make their relationships productive.	
2. Members seek <i>mutual benefit</i> . They understand that they have mutual interests and seek common ground. They are all committed to pursuing a shared vision and creating a work environment that is fair and facilitating for all.	
3. Group members feel <i>empowered</i> . They are confident they have the mandate, opportunities and skills to manage conflict.	
4. Members regularly <i>take stock</i> and <i>reflect</i> on their conflict handling. They realize that becoming conflict-positive requires continuous experimenting, feedback and improvement.	

(Adapted from: Tjosvold, Dean, *The Conflict-Positive Organization*, New York: Addison Wesley, 1991.)

Delegation of Responsibility

The effectiveness of a group depends on how well it delegates responsibilities and supports members' activities from one meeting to the next. Members should feel free and confident they can carry out their responsibilities within clearly defined guidelines.

Delegation	Score 0-10
1. <i>Clear guidelines</i> – members know when they are free to act and when they should seek guidance from others.	
2. <i>Clear task definition</i> – members know what is expected of them between meetings.	
3. <i>Available assistance</i> – members have ready access to the help they need between meetings.	
4. <i>Freedom, safety, and support</i> – individual initiative is encouraged between meetings and the group supports members' efforts to carry out their responsibilities.	



Group Assessment Report Summary

Each group member should circle the numbers representing their scores for the items above. Openly discussing members' scores will increase group effectiveness.

Group dynamics: Task

- | | |
|-----------------------------|--|
| 1. Clear objectives | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 2. Focus on outcomes | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 3. Results achievement | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 4. Sharing the load | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 5. Learning from experience | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |

Group dynamics: Process

- | | |
|------------------------------|--|
| 1. Common purpose/principles | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 2. Role clarity | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 3. Climate | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 4. Consultation | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 5. Listening | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 6. Self-discipline | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 7. Detachment | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 8. Conflict | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 9. Order | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |

Constructive Conflict

- | | |
|-------------------------|--|
| 1. Value diversity | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 2. Mutual benefit | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 3. Empowered | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 4. Take stock & reflect | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |

Delegation

- | | |
|------------------------------|--|
| 1. Clear guidelines | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 2. Clear task definition | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 3. Available assistance | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |
| 4. Freedom, safety & support | 0 ... 1 ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 |

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