

Coalition Roles in Strategic Planning

The overall goal of a coalition is to share the load in order to achieve agreed-upon priorities. This philosophy holds true for the coalition strategic planning process, as well.

Each coalition operates slightly differently. ***The important point is not to ensure you have people assigned to each role, but rather that you have people assigned to each task or responsibility.*** Some tasks and responsibilities go together and should be held by a single individual so that tasks don't fall through the cracks. Other responsibilities can be shared across coalition members.

Common Strategic Planning Tasks

In addition to the assignments given during the meetings for participants to take on, common tasks or responsibilities required for coalition strategic planning include:

Meeting Planning

- » Read through the Manual and Facilitator's Guide.
- » Finalize the agenda, including integrating Get-to-Know-You activities, outlining the agenda schedule, clarifying meeting goals, integrating useful facilitation techniques, etc.
- » Schedule the meeting.
- » Send out meeting reminders.
- » Reach out individually to participants who may need a nudge or reminder to attend.
- » Secure the space for the meeting and/or set up the virtual platform.
- » Ensure all materials, supplies, and handouts are available (flip charts, flip chart pens, laptops with cords, presentation screen, handouts, food, pens, paper for notes, etc.).
- » Set up the tables and chairs in the room in the best way to meet the meeting's goals. For example, if the agenda calls for small group work, perhaps you arrange the tables into groups of 4-6 people. If the agenda is a presentation, perhaps you put chairs and tables all facing forward.

Meeting Facilitation

- » Run the meeting.
- » Ensure meeting goals are being met.
- » Ensure the group sticks to the agenda (unless there is a need to veer off the agenda), including any get-to-know-you activities and facilitation techniques.
- » Encourage participation /ensure everyone participates.

Notetaker

- » The notetaker should be a different person than the facilitator. The facilitator needs to focus on the agenda and engaging the participants.
- » Ensure all participants have signed the sign-in sheet.
- » Take minutes (notes) on the meeting, focusing on:
 - Primary points of discussion
 - Vote outcomes

- Questions that need answering
- Next steps and assignments
- » Review notes after the meeting for accuracy and clean up format and language, as needed.

Timekeeper

- » Keep track of time during meetings and ensure the group stays on task and within the agenda timeframe.

Meeting Follow-Up

- » Send out meeting minutes with assignments clearly highlighted.
- » Send out follow-up documents (if applicable).
- » Upload meeting minutes onto shared drive.
- » Remind participants when the next meeting will take place.

Soup to Nuts Project Management

- » Follow up with participants on their assignments.
- » Track the group's timeline.
- » Identify participants to take on tasks.
- » Trouble shoot problem solving or task completion.
- » Ensure consistency from meeting to meeting and task to task.
- » Meet individually with new workgroup members or those who have missed meetings to catch them up on the process and progress.
- » Act as a liaison between the workgroup and the coalition or other key partners.

Common Strategic Planning Roles

Some common roles that can perform these duties include:

- » Coalition or workgroup Chair or Co-Chair
- » Facilitator
- » Coalition coordinator
- » Participating members

Some of these tasks can be covered by different individuals each meeting; for example, you can trade off the notetaking duties or assign finding a meeting location to different participants.

However, other tasks such as meeting planning and facilitation require a specific skill set (organization, attention to detail, planning, public speaking, facilitation, etc.) and are best conducted by those with such expertise.

Example scenario: If the coalition has a paid coordinator, one possible split of responsibilities may include the Chair and Coordinator working together on the meeting agenda; the Coordinator leading the meeting planning and facilitating the meeting (with the Chair welcoming the group and introducing the agenda at the beginning of the meeting); the Coordinator conducting meeting follow-up; a group participant taking notes; and either the

Chair or Coordinator acting as project manager to ensure the whole endeavor is moving forward effectively and efficiently.

In Coalitions Lite, we refer to five roles throughout the process as though they are five separate people: Chair, Facilitator, Notetaker, Timekeeper, and Participant. If your coalition has decided a different split of responsibilities, that's fine, too!