Coalitions Lite Meeting #1: Plan for Coalitions Lite|Facilitator guide

## Time: *2 hours*

## **Objectives**

1. Assess the coalition’s capacity to engage in Coalitions Lite strategic planning process
2. Review Coalitions Lite and create a plan for conducting the CL process
3. Outline next steps

## **Materials (Facilitator’s version)**

1. [Step 1 Standards](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/standards.xlsx)
2. Meeting #1 Facilitator Guide (this guide)
3. [Meeting #1 Power Point Presentation](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step1powerpoint.pptx)
4. [Meeting minutes](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step1minutes.docx)
5. [Participants’ agenda](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step1agenda.docx)
6. [Planning Process Overview graphic](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixAProcessOverview.pdf)
7. [Editable Planning Process Overview graphic](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/appendixaprocessovervieweditable.pdf)
8. [Coalitions Lite Plan Template](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step1plan.docx)
9. [Meeting Facilitation](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixAMeetingFacilitation.pdf) information sheet
10. [Team Building Opportunities](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixATeamBuilding.pdf) information sheet
11. [Voting Techniques](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixAVoting.pdf) information sheet

## **Facilitator Preparation**

Get a list of all members participating in Coalitions Lite

Review the Step 1 Standards and the Meeting #1 Facilitator Guide (this guide)

Review the Meeting #1 Power Point, including the notes section, and make any needed edits

Review the Process Overview Graphic

Review the Voting Techniques information sheet

Review the Team Building Opportunities information sheet and select a team check-in

Review the Meeting Facilitation information sheet

Email all participants the Participants’ Agenda and the Process Overview Graphic

Prepare for the meeting: Secure meeting space, set up the tables and chairs, ensure IT needs (WiFi, ability to project/present, etc.), print any handouts such as the agenda, send a reminder or calendar invitation to participants, purchase any food, and gather supplies)

Ask one participant to bring their laptop and take notes. Make sure you send this person the Editable Planning Process Overview graphic, the Coalitions Lite Plan Template, and the Meeting Minutes Template.

**Agenda (Facilitator’s version)**

*Facilitation Tip:* This meeting moves fast! Try to move through each agenda item quickly. You are not looking for perfection; you’re just getting some ideas down and getting the group to start making decisions together.

However, some participants may process information differently or more slowly. Watch for signs it is moving too quickly throughout the meeting (such as body language, facial expressions, or low participation). Check in with the workgroup and adjust the pace if necessary. It is okay to spend more time if needed or even schedule a second meeting if it means keeping workgroup members engaged.

Take breaks as needed but be sure to keep an eye on the time.

### Welcome, introductions, and overview (*Slides 1-4*) (15 min)

* 1. If necessary, conduct introductions. Identify your role as facilitator.
  2. Conduct a brief team building “check in” (see [**Team Building Opportunities**](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixATeamBuilding.pdf) for ideas).
  3. If not already done, identify a note taker and timekeeper.
  4. Decide on a process for taking and sharing notes and other documents.
  5. Determine how to get feedback from stakeholders
  6. Review the objectives for the meeting

### Assess coalition capacity for engagement (*Slides 5-10*) (10 min)

* 1. Review the [Planning Process Overview Graphic](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixAProcessOverview.pdf)
  2. Review the reasons for engaging in a strategic planning process
  3. Assess any concerns about the coalition’s overall capacity and support for this process
  4. If additional support if needed, identify strategies to increase buy-in

*Facilitation Tip*: If the group is not speaking up, try asking them to “Pair and Share” by turning to their neighbor and answering the questions above. Then ask a few people to share their insights with everyone to spur the larger group discussion. Check for signs that the workgroup members’ buy-in may be low based on responses, body language or lack of participation in the conversation.

### Create a plan for conducting Coalitions Lite (*Slides 11-19*)(45 min)

*Facilitation Tip*: Be sure the timekeeper tracks time well during this section of the agenda so the group can complete all steps within the allotted 45 minutes.

* 1. Review the primary focus of today’s meeting: Solidify the plan for engaging in the Coalitions Lite

*Facilitation Tip:* Keep the focus of the discussion on creating the plan. Workgroup members may start brainstorming ideas and action steps for subsequent meetings (such as people to interview, data sources, or even strategies and activities). Make note of these ideas to discuss later, then redirect the conversation back to the agenda. See the [**Meeting Facilitation information sheet**](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixAMeetingFacilitation.pdf) for more information.

* 1. Determine a timeline for completion
  2. Determine how you will conduct the process
  3. Determine how you will monitor and share progress

1. Determine resource needs (*Slides 20-22*)(15 min)
2. Brainstorm what people and resources you need for the process
3. Identify individuals/agencies outside of your group who might be useful on an as-needed basis
4. Identify financial resources you have and need (direct funds or in-kind)
5. Create a brief plan to secure these resources

### Identify basic community strengths and challenges (*Slides 23-26*) (20 min)

1. Brainstorm a list of community strengths
2. Brainstorm a short-list (2 to 4 options) of issues the coalition may want to prioritize

### Wrap up & next steps (*Slides 27-31*) (15 min)

1. Preview Step 2
2. Assignments
3. Meeting check-out: What worked well or didn’t work well in the meeting?
4. Celebrate your work today!
5. Adjourn!

*Facilitation Tip*: Some members may not feel comfortable expressing dissatisfaction. Look for signs such as body language or lack of participation in the conversation. It’s okay to encourage people to speak up, just be careful of putting them on the spot. Make a space for them to speak up – be comfortable with a minute of silence as they consider what they want to say and be open to helpful criticism.