Coalitions Lite Meeting #2: Identify Data Needs|Facilitator guide

## Time: *2.5 hours*

## **Objectives**

1. Set expectations for the meeting
2. Review workgroup’s progress on the strategic planning process
3. Select and specify the broader issue(s) to prioritize in the strategic plan
4. Review knowledge gaps – what don’t we know yet about our priority issue(s)
5. Identify and select data sources to fill knowledge gaps
6. Prepare for the key stakeholder interviews
7. Decide how the group will collect data in Step 2b
8. Review the tools for Step 2b
9. Wrap up and next steps

## **Materials**

1. [Step 2 Standards](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/standards.xlsx)
2. Meeting #2 Facilitator Guide (this guide)
3. [Meeting #2 Power Point Presentation](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2powerpoint.pptx)
4. [Meeting #2 Meeting Minutes Template](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2minutes.docx)
5. [Meeting #2 Participant Agenda](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2agenda.docx)
6. Planning Process Overview timeline created in Meeting #1 (for reference)
7. Coalitions Lite Plan from Meeting #1 (for reference)
8. Short-list of priorities from Meeting #1
9. [Issue Overview Information Sheet](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2issueoverview.docx)
10. [Data Sources Overview Information Sheet](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2datasourceoverview.docx)
11. [Stakeholder Interview Form with Data Summary Form](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2toolinterviewform.docx)
12. [Data Summary Tool Example](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2datasummaryexample.docx)
13. [Interview Checklist](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2toolinterviewchecklist.docx)
14. [Data Tips Information Sheet](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step2datatips.docx)
15. Large flip charts with markers

## **Facilitator Preparation**

Review the Meeting #2 Facilitator Guide (this guide)

Review Coalitions Lite Step 2 Power Points, including the notes section

Briefly review the process timeline created in Meeting #1

Fill in any information specific to your coalition in the Power Point (timeline, assignments, priorities, etc.)

Decide on a *brief* team building activity or quick check-in

Review the short-list of priorities from Meeting #1 and related data from Health Department

Briefly review the Data Sources Overview (used for brainstorming during meeting)

Briefly review the Key Stakeholder Interview Form with the Data Summary Tool (used by members during Step 2b)

Briefly review the Key Stakeholder Interview Checklist (used by members during Step 2b)

Briefly review the Data Tips information sheet (used by members during Step 2b)

Print out copies of the tools for Step 2b:

* Data Tips
* Interview Checklist
* Stakeholder Interview Form
* Data Summary Tool(bottom of the Stakeholder Interview Form)
* Example Data Summary Tool

## **General Notes about Meeting #2**

1. **This meeting moves FAST!** These discussions can easily go off-track, drift into finding solutions, or become circular with people repeating the same points. Unless you’re open to a 5-hour meeting (!), let people know throughout the meeting that these conversations will be short. The timekeeper should be comfortable redirecting people and keeping the meeting on track. If the group is feeling like they won’t be able to come to consensus with short conversations, ask them if they would prefer to schedule a second meeting. Sometimes additional time really is needed to get everyone on board.
2. **Make sure the notetaker captures all the information written on the flip charts in the meeting minutes.** If they are not able to capture everything during the meeting, give them the flip charts after the meeting and make sure they incorporate all the information afterwards. The meeting minutes will be your primary documentation of the group’s process, decisions, and assignments, so it is important the flip chart information is captured accurately in the minutes. Write clearly on the flipcharts!
3. **Don’t let perfect be the enemy of good.** You do not have to find “the most important” issue, identify every data need, or think of all possible data sources. Make a reasonable effort and move on.

**Agenda (Facilitator Version)**

### Welcome, introductions, and overview (*Slides 1-6*) (15 min)

* 1. If necessary, conduct introductions. Identify your role as facilitator.
  2. Conduct a brief team building “check-in.”
  3. Identify the notetaker and timekeeper.
  4. Review the process for taking and sharing notes and other documents decided upon in Meeting #1.
  5. Review the objectives for the meeting.
  6. Let people know that this meeting’s agenda is packed full and moves fast.
  7. Review workgroup’s progress on the strategic planning process

*Facilitation Tip:* If you find throughout the meeting that people are dragging conversations out or struggling to make decisions, ask them again if they would prefer to schedule another meeting.

### Select the larger issues to prioritize in the strategic plan (*Slides 7-13*) (25 min)

* 1. Your first goal in Step 2 is to narrow down your short-list of prioritized issues to one or two issues.
  2. Review the short-list of issues the coalition came up with in Meeting #1.
  3. Briefly review the data you have for each short-listed issue.
  4. Facilitate a discussion around the data and issues.
  5. Have the group vote with a raise of hands for their preferred issue. The top 1-2 scoring issues become your priorities.

*Facilitation Tip:* Don’t get stuck trying to identify the “right” or “most important” issues. Focus on the one or two issues that 1) data show need some attention and 2) the members feel passionate about. You can always add more priorities later.

### Specify your priority issue(s) (*Slides 14-17*) (10 min)

* 1. Explain what we mean by “knowledge gap” and the three knowledge gaps we aim to fill in Step 2b.
  2. Review the Issue Overview slide / handout for examples of “specifying” an issue.
  3. Post a clean flip chart sheet labelled “Specified Issue” and note down the group’s ideas.
  4. Based on the data you reviewed earlier and your knowledge of your community, do you have a sense at this time how you want to narrow down your priority issue(s)? If so, what specifically about this issue should we focus on?
  5. Who does the issue(s) affect most in our community? Take notes on the flip chart.

### Identify and select data sources and people to interview to learn more about your issue(s) (*Slides 18-22*) (25 min)

* 1. Briefly review the Data Sources Information Sheet with the group to get ideas of data sources.
  2. Post a clean flip chart sheet labelled “Data Sources.”
  3. Brainstorm which data sources will tell you the most about your priority issue(s) and your three knowledge gaps.
  4. Now that you’ve finished brainstorming data sources, select which data sources to look into.

### Prepare for the stakeholder interviews (*Slides 23-25*) (15 min)

* 1. Review the questions in the [**Stakeholder Interview Form**](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/Step2ToolInterviewForm.docx).
  2. Revise the questions to meet your knowledge gaps.

*Facilitation Tip:* Depending on the size of your workgroup, you may want to split into two groups, one for each prioritized issue.

1. Brainstorm a few speaking points for an “elevator speech.”

### Decide how the group will collect the data (*Slides 26-30*) (25 min)

* 1. During this section of the meeting, the group will decide how to approach data collection and interviewing and review the tools available to help them.
  2. It’s important that members feel confident about their interviewing and data collection assignments.
  3. Decide who will collect which data.
  4. Discuss expectations for data collection.
  5. Discuss expectations for summarizing the data for Meeting #3.
  6. Decide on incentives available for key stakeholders and/or reimbursement for members’ expenses.

### Review the tools for data collection and interviews (*Slides 31-32*) (10 min)

* 1. These do not need to be reviewed in detail, but it’s important that everyone is comfortable with the tools they’re expected to use.
  2. Hand out copies for everyone to review at the meeting (hard copy or digital).

### Wrap up and next steps (*Slides 33-37*) (10 min)

* 1. Assignments
  2. Preview of and preparation for Meeting #3
  3. Lead a meeting check-out

*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.

* 1. Celebrate your progress and wrap-up!