Coalitions Lite Meeting #3: Interpret the Data & Select Priorities|Facilitator guide

## Time: *2-3 hours*

## **Objectives**

1. Set expectations for the meeting
2. Review workgroup’s progress on the strategic planning process
3. Select which data to use
4. Further define the prioritized issues
5. Identify the contributing “why” factors for your issues
6. Wrap up and next steps

## **Materials**

1. [Step 3 Standards](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/standards.xlsx)
2. Meeting #3 Facilitator Guide (this guide)
3. [Meeting #3 Power Point Presentation](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step3powerpoint.pptx)
4. [Meeting #3 Meeting Minute Template](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step3minutes.docx)
5. [Meeting #3 Participant Agenda](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step3agenda.docx)
6. Members’ completed Data Summary Tools and supporting data documents
7. [Data Tips](https://slco.org/globalassets/1-site-files/health/prgrams/community-groups/coalitions-lite/Step2DataTips.docx)
8. [Data Sources Overview](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/Step2DataSourceOverview.docx) (for reference during the meeting)
9. [Voting Techniques](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixAVoting.pdf) information sheet
10. [Issue Overview Handout](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/Step2HOIssueOverview.pdf)
11. Large flip charts, white board, or other method that allows everyone to see all the issues and ideas at once
12. Dot stickers (at least 8 per member)

## **Facilitator Preparation**

Review Coalitions Lite Step 3 Power Point, including the notes sections

Review the Meeting #3 Facilitator Guide (this guide)

Briefly review the process timeline created in Meeting #1

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

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

Review the Data Summary Tools completed by members during Step 2

Review the Data Tips information sheet

Review the thumb and fist-to-five voting strategies on the Voting Techniques sheet

Briefly review the Key Stakeholder Interview Planning Form created during Meeting #2

For each issue, create flip chart sheets labeled: “Issue Specification,” and “Contributing Factors.” Have extra sheets available for more writing space if needed. Make sure to write the issue (“mental health,” “nutrition,” etc.) on the flip chart sheets so the sheets don’t get mixed up between issues.

## **General Notes about Meeting #3**

1. This process takes the group step-by-step through strategic planning decision making. **It is very easy for group members to skip ahead in the process**, for example, discussing what the data means when you’re only supposed to be deciding whether to use the data, or discussing strategies when you’re only looking at priorities. The facilitator must keep the group focused on the discussion at hand – don’t let them skip forward! Remind them that you will get to that discussion soon, when you’ve considered other foundational issues.
2. **Give members the space they need to feel comfortable with the data.**  Members will have different comfort levels working with data, especially “number” data. Be on the lookout for signs of confusion or disengagement, check for understanding with techniques like thumb votes, and don’t be afraid to slow the meeting down to make sure everyone is on the same page.
3. **Don’t let perfect be the enemy of good.** You do not have to use every piece of data or provide the “best” interpretations. Make a reasonable effort and move on.
4. **Given the nature of this meeting, it is very difficult to predict timing.** The suggested scheduled time is 3 hours but, depending on how much data you’ve collected, it may take more or less time. Think through in advance how much time you think the group will need and adjust the agenda and meeting schedule accordingly. The suggested time is approximately 1 hour per prioritized issue for agenda items 4 thru 6. Don’t forget to take breaks as needed!

**Agenda (Facilitator Version)**

### Welcome, introductions, and overview (*Slides 1-4*) (10 min)

* 1. If necessary, conduct introductions. Identify your role as facilitator.
  2. Conduct a brief team building “check in.”
  3. Identify the notetaker(s) 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 (see above).

*Facilitation Tip:* **Consider using two notetakers for this meeting.** Flip charts are used heavily in this meeting. It’ll be difficult for the facilitator to facilitate the conversation and complete the flip charts, and it might be difficult for one notetaker to move between flip charts and electronic notes. Having a second person take notes also allows another voice to check-in with the group. For example, a flip chart notetaker may say, “Does what I wrote here capture your comment?” or “Can you please repeat your comment so I can make sure I captured it correctly?”

### Review workgroup’s progress on Coalitions Lite (*Slides 5-7*) (5 min)

* 1. Review where the workgroup is in the process
  2. Summarize the outcome of Meeting #2
  3. Review progress for assignments from previous meetings and data collection.

*Facilitation Tip:* **Keep the group moving quickly through agenda item 3.** Aim for no more than 30 minutes. Most data sources will have limitations, but you’ll still use them so it’s not worth belaboring the matter. It’ll usually be quickly apparent when a data source is not useful because it’s too unlike your community, isn’t providing data directly related to understanding your issue, and/or isn’t trustworthy. If the group chooses to use all pieces of data, that’s fine.

### Select Which Data to Use (*Slides 8-9*) (15 min)

1. Your first goal in Step 3 is to decide which data to use to learn more about your prioritized issues. You will be making these decisions based on 1) the quality of the data and 2) how relevant it is to your issue.
2. Review the first four sections of each completed **Data Summary Tool** and discuss the questions to make your decisions.

*Facilitation Tip:* If you haven’t taken a break by the time all groups have reported out, now would be a good time to take 5 minutes. Use this time to finalize the “Data” flip chart.

### Specify the Prioritized Issue(s) (*Slides 10-14*) (20 min per issue)

* 1. Your next goal in Step 3 is for the whole group to review the “issue specification” data for each piece of data you’ve decided to use.
     + If the group has prioritized two issues, you’ll complete agenda items #4 and #5 for the first issue **and then repeat agenda items #4 and #5 for the second issue**.
  2. One at a time, have members share their “what does the information mean” sections from their Data Summary Tools, paying special attention to the two knowledge gaps you are addressing.
  3. Record the consensus on a flip chart sheet labelled “Issue Specification.” Make sure to note which data source you’re referring to (for example: “Omar Bashar interview,” or “Census”).

*Facilitation Tip:* Some of the discussions and decisions will be difficult and lengthy, but some will move quickly and that’s great! Don’t feel like the group has to have a prolonged discussion about each decision. As long as they’ve considered the basic questions, **move on**.

1. Facilitate a discussion around what you’ve found and further specifying the issue.
2. Have the group vote on how to define the issue and whether to focus efforts on a specific population.

*Facilitation Tip:* Encourage people to talk openly and actively engage in conversation to ensure that all perspectives are considered. But **keep the discussion focused on what is contributing to the problem**, **not what the coalition wants to do to solve the problem.**

### Review the Contributing Factor Data (*Slides 15-16*) (20 min per issue)

* 1. Now you’ll move on to discussing the information you gathered about *why* these issues are happening in your community.
  2. For the selected data, have the members share their “what does the information mean” sections from their Data Summary Tools.
  3. *Ask the group: What does the data say about what is contributing to the issue or why it’s happening?*
  4. Record the consensus on the “Contributing Factor” flip chart. Make sure to note which data source you’re referring to.

### Decide Priority Contributing Factors (Slides 17-20) (20 min per issue)

* 1. *Ask the group: Are there any factors that should be removed from consideration because 1) we only have a vague understanding of it (it’s not specific enough to know what action could impact it) or 2) it has conflicting data*?
  2. It’s also important to consider non-data concerns. Ask the group: Are there any other considerations *besides data we should think about in deciding whether to focus on any of the contributing factors?*

*Facilitation Tip:* **Don’t let this discussion stray into selecting specific strategies.** However, it’s worth considering if it would be very difficult (if not impossible) or take a long time for the coalition to impact a factor. While they may be important factors, these may not be a good use of the coalition’s resources.

1. Record your decision and reason in the minutes and on the flip chart.
2. Vote on contributing factors to prioritize.
3. Check in with the group to see if the results feel right to them.
4. Have the notetaker record the selected contributing factors.

### Wrap Up and Next Steps (*Slides 21-25*) (10 min)

* 1. Preview of and preparation for Meeting #4
  2. Assignments
  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!