Coalitions Lite Meeting #4: Review Resources & Identify Strategies | Facilitator guide

## Time: *2.5 hours*

## **Objectives**

1. Review workgroup’s progress on the strategic planning process
2. Review existing community resources
3. Identify and select strategies to impact contributing factors
4. Wrap up and next steps

## **Materials**

1. [Step 4 Standards](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/standards.xlsx)
2. Meeting #4 Facilitator Guide (this guide)
3. [Meeting #4 Power Point Presentation](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step4powerpoint.pptx)
4. [Meeting #4 Meeting Minutes Template](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step4minutes.docx)
5. [Meeting #4 Participant Agenda](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step4agenda.docx)
6. Planning Process Overview timeline created in Meeting #1
7. [Strategy Overview Tool](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/step3toolstrategyoverview.docx) (used by notetaker during the meeting and for member reference)
8. [Selecting Strategies to Create Change](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/Step4SelectingStrategies.docx) Handout
9. [Voting Techniques](https://slco.org/globalassets/1-site-files/health/programs/community-groups/coalitions-lite/AppendixAVoting.pdf) information sheet
10. Large flip charts sheets
11. Dot stickers (at least 15 per member)

## **Facilitator Preparation**

☐ Review Coalitions Lite Meeting #4 Power Point, including the notes section. Fill in any information in the power point such as timeline, priorities, assignments, etc.

☐ Review the Meeting #4 Facilitator Guide (this guide)

☐ Briefly review the process timeline created in Meeting #1

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

☐ Review and print the Selecting Strategies to Create Change information sheet. Print copies to hand out during the meeting.

☐ Review the dot voting method on the Voting Techniques information sheet

☐ For each contributing factor, create flip chart sheets labeled: “Community Resources,”“Strategies,” and “Research.” Have extra flip chart sheets in case needed.

☐ Create a flip chart sheet labeled “Coalition Constraints & Assets.”

☐ If you don’t have a group member from local schools or service providers, consider inviting a few extra people to Meeting #4 who know about resources in the community.

## **General Notes about Meeting #4**

1. **Don’t let perfect be the enemy of good.** You do not have to find every resource or review every potential strategy. Make a reasonable effort and move on.
2. **If you gathered additional information on why your issues are happening after Meeting #3**, add an agenda item to review the new information and discuss with the group whether the new information changes or clarifies your selected factors. Adjust the meeting time accordingly. If you need to make modifications to your decisions in Meeting #3 based on coalition feedback,adjust the meeting agenda accordingly.

**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 documents decided upon in Meeting #1.
  5. Review the objectives for the meeting (see above).

*Facilitation Tip:* **Use two notetakers for this meeting.** Flip charts (or similar) 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 repeat your comment so I can make sure I captured it correctly?”

### Review workgroup’s progress on Coalitions Lite (*Slides 5-8*) (5 min)

* 1. Review where the workgroup is in the process
  2. Summarize the outcome of Meeting #3
  3. Review progress for any incomplete assignments.

*Facilitation Tip:* **Keep the group moving quickly through agenda item 3.** Go with the resources your group is aware of and don’t worry about doing a more thorough resource assessment. You want to be generally aware of what’s available to avoid completely duplicating efforts, but the issues you’ve selected exist in your community because current resources are insufficient. Keep the group focused on identifying resources, not on selecting strategies and solutions.

### Identify Existing Community Resources (*Slides 9-11*) (20 min)

* 1. Brainstorm resources already available to address the “why” factors for your issues.
  2. Capture each resource on the “Community Resources” flipchart for each issue.

### Selecting Strategies Overview (*Slides 12-15*) (15 min)

* 1. Review and discuss the **Selecting Strategies to Create Change** information sheet.
  2. Brainstorm the constraints and assets the coalition may have around possible strategies. Take notes on the “Coalition Constraints & Assets” flip chart.

*Facilitation Tip:* This is a good time to take a 10 to 15-minute break so that those who didn’t review the Selecting Strategies to Create document in preparation for the meeting can do so before the next section and members can start thinking of potential strategies based on the identified resources.

### Research Strategies for the Strategic Plan (*Slides 16-19*) (45 min)

* 1. Start with a 15-minute group brainstorm to consider potential strategies that impact your contributing factors and their expected outcomes.
  2. The group will now spend 30 minutes researching strategies.

### Select Your Strategies (*Slides 20-24*) (45 min)

* 1. Bring the group back together. Have each group or individual report back on their top 2-3 strategies, focusing on how each strategy fulfills the stated criteria. Write the strategies on the flipcharts under the appropriate contributing factors they impact.
  2. Eliminate any strategies that don’t fit a lot of the criteria.
  3. Briefly discuss what we expect each strategy to achieve. This is important as a check to make sure the strategy really will impact your contributing factor. It also gives you a simple evaluation goal.
  4. Use the dot voting method for selecting strategies.
  5. Check in with the group to see if the results feel right to them.
  6. Conduct a thumb vote to confirm everyone supports the group’s decision.

### Wrap Up and Next steps (*Slides 25-29*) (10 min)

* 1. Assignments
  2. Preview of and preparation for Meeting #5
  3. Lead a meeting check-out
  4. Celebrate your progress and wrap-up!