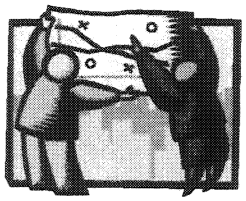
Chapter 1: Building the Coalition



This chapter provides steps for building a solid coalition structure.

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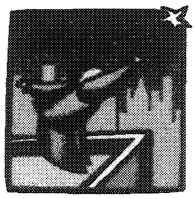
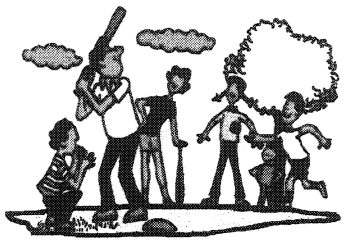


Chapter 1 *Building the Coalition*

Module 1: Getting Started

Step Up and Step Out to build a coalition for success!

There are few things more important than making sure our kids lead happy, healthy lives. **Step Up and Step Out** can make that possible. The degree of success is dependent on the coalition each community develops.
This chapter will give you a start on doing that!



What is a coalition and how is it formed?

The word coalition sounds a little complex, but it is exactly whatever your community wants to make it. Coalitions are about people coming together for a common purpose.

Description of a coalition

"A joining of individuals, groups, and businesses with a shared goal of creating changes together that would be impossible independently."

How coalitions take shape

- Coalitions start with a thought, an idea of wanting a change, or improvement.
- Coalitions progress when people come together to define a purpose and mission.
- Coalitions start to take form when people begin looking at opportunities for change.
- Coalitions make a difference when actions are taken.

How do coalitions for kids' health look?

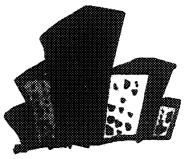
Every coalition for kids' health looks different. Coalitions are just as unique as the communities in which they are formed. Communities are the "big picture" and how your coalition fits into this picture varies with the things that make your community unique...the resources, people, and goals!

When the paint dries, the picture your coalition has painted will be the picture that fits the health needs of kids in your community.

It may be easier to understand potential differences if you compare Commuterville, USA with Urban Town, USA.

Commuterville, USA: Population 4000

Businesses: Bank, Post Office, 1 Grocery Store, 2 Restaurants, 2 Childcare Centers, 4 Churches, 1 Long-term Care Facility, 2 Gas Stations, 1 Hardware Store, 2 Gift Shops, 1 Physician, 1 Chiropractor, 1 Hairdresser
Schools: 1 each Elementary, Middle School, and High School
Recreation Facilities: none



Urban Town, USA: Population 60,000

Businesses: Multiple businesses in all areas, including 2 industries, which employ more than 500 people each
Schools: Multiple schools of each grade level
Recreation Facilities: Bowling Alley, City Recreation Department

Residents in Commuterville work in other cities, so many are not available during the day. A limited number of businesses and a lack of recreation facilities create one set of opportunities for Commuterville. Urban Town on the other hand, has many businesses and an existing recreation facility, so it is very likely their goals will look much different.

Common qualities of successful coalitions

Although all coalitions look different, common factors for a strong coalition have been identified.

Successful coalitions will:

- Know what they want to change or achieve
- Market and recruit to organize a committed group of community members
- Go through a community review, or evaluation process, to determine wants, needs, resources and problems that limit change
- Model, or practice in daily life, the changes they wish to create

Your first question at this point is probably:
How do you build a coalition that incorporates all of the above factors?

The answer is:
There are probably several different ways that a coalition can be built, but this chapter gives you steps that when taken, can lead to great success!

Taking the first steps to coalition building

There are two steps that your core group of organizers needs to take at the same time. **Both are very important!**

- **Create a community awareness of reasons and plans for coalition building**
- **Recruit coalition members**

Step Up and Step Out to create community awareness!

This **very important step** is taken *before, during and beyond* the coalition building process. People need to know what you are doing, but also become aware of the issues that prompt your actions.

Developing a marketing plan based on coalition goals will come later, but for now, you need to plan a series of actions to create ***interest and excitement*** in the coalition and initiative!

There are many small awareness-building steps you can take at this point that won't require much time or resources, if you plan wisely. Involving ***everyone*** in your coalition's core-planning group ***now*** is important. It will allow you to spread the work around, and to create ownership of the building process!

Awareness tools

- Word of mouth
- Media
- School and community events or activities
- Business involvement

Examples of media use:

- Newspaper or newsletter articles; posters on public bulletin boards
- Information in physician's waiting rooms
- Public service radio announcements

Examples of school events or activities:

- Healthy cooking or recipe contest, such as a Chili Cook-off
- School sponsored "Fruit and Vegetable Play"
- A special meal in the school cafeteria
- A "Happy Birthday to **Step Up and Step Out**" day at school
- Announcements or skits at Parent-Teacher Organization meetings

Examples of community events or activities:

- Enactment of a healthy eating and/or physical activity story by kids at the community Fall/Spring festival
- Community health fair
- Community "games" or "Health Walk"
- A contest to create a special name for your coalition's initiative
- A short "skit" during half-time of a football or basketball game—or leading everyone in a "**Step Up and Step Out** Wave" and introduce the concept of increasing opportunities for physical activity

Examples of business involvement:

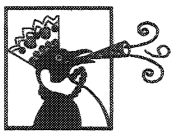
- Post fruit and vegetable artwork created by students in the local supermarket
- Have merchants and schools welcome your initiative on their signs

Try for a minimum of two to four "awareness actions" per month for the first six months of coalition building. Be creative, but don't "overspend" time or other resources!

Now you are ready to begin inviting community members to join the coalition!

Step Up and Step Out to recruit coalition members!

Come to the Coalition Meeting at 5:30 p.m. Tuesday



Most of us have planned a party at one time or another and worried whether or not anyone would show up. Just as everyone looks forward to a good turnout for a party, your coalition *wants* good community representation. The tool for making sure of good participation is recruitment! It is a skill your coalition will want to develop every step of the way.

In the beginning you will want to recruit people to just get the coalition started. Later you will be recruiting for help with specific activities. Always, you will be looking for new members to replace those who have moved on or to generate new ideas, approaches, and resources. Recruiting isn't an overwhelming task if it becomes a matter of habit, rather than one of effort.

Who should be recruited?

The answer to that one is easy—*anyone and everyone*...from the middle school student to the mayor of your town, or the small hometown shop owner to the large corporation president. Of course you'll want to recruit particular groups and individuals for different reasons, but *everyone* has something important to contribute! Keep in mind, ideas and creativity are more diverse when you have a good cross-section of people involved!

There is a tendency in the early stages of coalition building to focus on recruitment of recognized community leaders. You will want to include them because of their position and authority to readily remove obstacles to action. However, relying on them really limits your possibilities. Busy leaders may support the coalition, but may not be able play key roles for taking actions. Less recognized individuals are more likely to become coalition leaders or play other key roles in the coalition.

Coalition terminology: members vs. partners

The words coalition member and partner are sometimes used interchangeably, but there is a distinction.

- **Partner**: An established agency, organization, or business that has interests compatible with the coalition
- **Member:** An individual who shares a personal interest with the coalition.

Partner/member traits

1. **Agencies or organizations with common interests, goals, and resources**

Examples:

The American Heart Association, American Cancer Society, American Diabetes Association, Pork Producers, Beef Council, Wheat Commission, County Extension, State Board of Education, 4-H, Girl Scouts, Boy Scouts, Camp Fire, YMCA/YWCA, physicians, wellness coordinators, and dentists

2. **Direct links for supporting the goals of the coalition**

Examples:

The school board, PTO/PTA presidents, site councils, principals, superintendents, church leaders, community theater programs, day care operators, coaches, gymnastic instructors, and camp directors

3. **Businesses with similar but sometimes conflicting goals**

Examples:

Fast food and other restaurants, food and beverage suppliers, and fund-raisers

4. **Businesses that provide community service**

Examples:

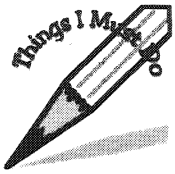
Banks, supermarkets, libraries, police and fire departments, corporations, colleges, universities, athletic teams, newspapers, television stations, radio stations, and bookstores

Recruitment action steps

There are no "rules" about how many people must be recruited, so just have fun! Think of the steps to recruiting coalition members and partners as you would a party:

- **Plan...the first step to excitement**
- **Invite...actively recruit**
- **Make sure everyone is having a good time... sustain participation**

Plan...the first step to excitement

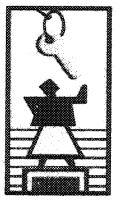


Planning for recruitment, just like anything else, is probably the most difficult part of getting organized. Use the tips provided to guide your plans.

1. **Plan to identify win/win situations**
2. **Identify benefits to members and partners**
3. **Identify reasons individuals may be reluctant to join**
4. **Identify existing partnerships**
5. **Plan different levels of participation**

1. Plan to identify win/win situations!

A "win/win" situation occurs when all parties involved benefit in some manner from the relationship!



Everyone has something to bring to a coalition, but determining how a person's skills, talents, and resources fit the needs of the initiative is the way to identify "wins" (benefits) to the coalition.

Resources that benefit the coalition include:

- Expertise
- Time
- Money
- People
- Role Models
- Media Access
- Products
- Credibility

Sometimes an opportunity is viewed as a resource, including the chance to:

- Institutionalize ideas
- Network
- Test new concepts

Examples –Resources used to create "wins" for the coalition include:

- Media...newspapers, radio/TV stations provide opportunities for communication
- Products...grocery stores provide food samples, field trips
- Products...sporting goods stores provide outlets for physical activity equipment
- Expertise...social service agencies provide nutrition consulting
- Expertise...financial institutions provide help with budgeting, or accounting
- Money...the community-at-large provides donations
- Network...speakers bureaus help promote **Step Up and Step Out**
- People and time...volunteers provide many different things

2. Identify the benefits to members and partners.

People become interested and stay motivated when they gain something for their efforts. Benefits can range from simple to complex, from recognition to monetary gain. Identifying how the partner can benefit as well as the coalition sets up a ***win/win*** situation!

Examples – "*Wins*" for others as a result of partnering with the coalition include:

School wins:

- Establishing healthy habits may lead to improved learning and retention by students
- Teachers, food service and administration can benefit through the exchange of ideas and access to additional resources
- The introduction of new ideas, products and classroom links with school meals may lead to increased school meal participation
- Healthy choices in nutrition and activity may lead to more students/staff, reducing the risk of sick days, and leading to financial gain
- Enhanced interventions for drug, tobacco, and alcohol programs

Business, agencies, or individuals wins:

- Goodwill/image building within the community
- Potential for increased business volume
- Community credibility as a partner/expert
- Potential tax savings, greater financial return

- Networking
- Potential to add to customer base
- Media exposure
- Enhanced competitive advantage
- Outlets for product distribution
- New test markets for products or services
- A preventive lifestyle that will help decrease health risk factors and may create long-term financial gains for the public/private sectors

3. Identify reasons individuals may be reluctant to join the coalition and then create win/win situations by working out solutions to problems.

Win/win situations cannot be created if perceived threats or conflicts are not identified and addressed. Individuals, organizations, or businesses may have an interest in some of the actions of the coalition, but may be very cautious about becoming involved. Many conflicts can be resolved to create ***win/win*** situations.

Examples:

Example 1: Partner with fast food and other restaurant managers to promote existing healthy menu items. The coalition can help market these offerings with healthy menu symbols, through promotion offers and newspaper/newsletter articles.

Example 2: Partner with food and beverage suppliers to provide healthy choices at concession stands during sports events. The coalition can promote these healthy items and provide feedback to the supplier on community preferences.

Example 3: Partner with school and community fund-raisers that are in competition with school meals or that sell products which send mixed messages. The coalition can help fund-raisers explore options that are not in conflict with its' goals, and ask the public to support them for the positive changes they make.

4. Identify existing partnerships that could be used to create *win/win* situations.

There may be established links that have not been pursued for recruiting. Direct links in a school-based community initiative include the school board, Parent-Teacher Organization (PTO) presidents, principals, the superintendent, and teachers.

Examples of *win/win* situations:

Example 1: The coalition can find community volunteers to help with classroom activities for a teacher who participates on the coalition.

Example 2: A school board member can get good community feedback on issues by participating on a coalition.

Example 3: The coalition provides PTO presidents a place to network with community partners. The PTO president can further the goals of the coalition by creating more opportunities for healthy eating and activity choices during programs and events.

5. Identify different levels of participation that allow varying levels of involvement to create win/win situations.

People, agencies, and businesses vary greatly in what they can contribute to the coalition. Successful recruitment depends on identifying different levels of participation. Build in ways everyone can participate, from the person who just wants to be kept informed of coalition activities, to the person who is the coalition's chairperson.

Partners or members are typically one of two types that are distinguished by how visible, or easily recognized they are within the coalition. Terms used to describe two different levels of participation are:

- ***Visible*:** Members and partners who are active in planning and initiating coalition actions
- ***Invisible:*** Members and partners who do not regularly attend coalition meetings but believe in and support the coalition

Visible partners and participation

Visible partners...the number of people who are visible at coalition meetings...is what coalition organizers first seek. It is mistakenly used as an indicator of the coalition's "success."

Examples of visible participation:

- Accepting organizational responsibilities
- "Waving the flag" of the coalition by marketing and becoming a spokesperson
- Looking at the big picture of the initiative to develop action plans
- Actively recruiting new members/partners
- Serving as an "idea person"
- Keeping initiative goals in mind as a team player
- Helping to develop leaders
- Seeking out funding sources
- Remaining a catalyst for action, and helping to implement strategies
- Helping to maintain and sustain the initiative

Invisible partners and participation

Invisible participation only means little visibility. A partner should not be excluded from recruitment just because it looks as though they will not be able to attend coalition meetings. They can still make significant contributions to the coalition. Explore ways to create ***win/win*** situations with partners at each level of participation.

Examples of invisible participation:

- Distributing information for the public
- Modeling desirable behaviors
- Providing incentives for desirable behavior
- Providing physical facilities
- Linking on an "as needed" basis perhaps if temporary support is needed
- Financial support
- Removing obstacles to action

Inviting partners...actively recruiting

Depending on your coalition's structure, recruitment can vary from reaching a person with a single phone call to a major team presentation for a large corporation.

It would be great if everyone played a role in recruiting, but the coalition may prefer to prepare a small group of individuals to be "official" recruiters. These recruiters would know the ins-and-outs of the coalition's plan, be able to identify ***win/win*** situations, and have good marketing skills.

Recruiting Efforts

The initial contact

1. If possible, have someone with an established relationship with the person make the contact. Or you can make the contact, and have the person with the relationship follow-up for support.

2. Have the coalition's interests in mind, e.g., desired partner resources, existing partnerships, win/win situations, existing conflicts, and ideas for different levels of participation.

3. Contact the person and request an appointment to discuss the coalition.

4. Be specific in what you ask.

The recruitment

1. Make your request in person if possible. Depending on the relationship, you may want to have a second person accompany you.

2. Be accurate and thorough in explaining the interests of the coalition so people will have a clear idea of what you are asking them to represent. Leave a small packet of information including the types of assistance needed. If coalition goals have a good fit with their beliefs and values, they are more likely to be involved.

3. Be prepared to discuss coalition expectations in terms of attendance, participation, and commitment. People need to be clear about these expectations once the coalition is established.

4. Of course you won't know coalition structure in the very early stages, but later, people need clarity about organization, i.e., plans for coalition leadership, decision-making, allocation of responsibilities, and approaches to problem solving.

5. Allow those being recruited an opportunity to express their expectations...what they want the coalition to do for them or their group. Taking time to do this allows the recruiter to identify potential ***win/win*** situations.

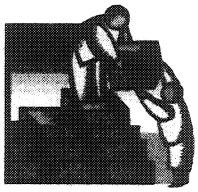
6. Present a ***win/win*** situation for the person or group you want to get involved...how the initiative can help personally or professionally.

7. Be sensitive to people's time. People may hesitate to get involved because of a perceived or a stated time commitment. If visible participation does not look likely, recruit then and there for invisible participation! Accept what people can give, such as help with a one-time event, or a monetary donation.

Tips for invisible partner recruitment

Recruitment doesn't always produce the outcome you first anticipate. Taking time to identify win/win situations often yields wonderful success!

1. Ask the person if you can "keep them in the loop" by sending meeting minutes and other items of interest as they come available through the year.
2. Determine if the person has a particular interest that would motivate them to become more involved in the future, then record the information for future reference.
3. Determine if the person has a good understanding of the initiative. Offer to explain it if they don't.



Invisible Partner Recruitment

Example:

Ted, the manager of the local supermarket in NutriCity, has verbalized support of the coalition's mission, but hasn't attended a meeting in two years. Although the secretary sends him meeting agendas and minutes, there has been no response. This year, the coalition planned an activity to increase parent awareness by having the 5th Grade present a "5 - To Go" (Fruit and Vegetable) Skit and provide samples of fruit and vegetable ideas for parents, something Ted's supermarket could help provide. Ted is contacted, and he is very glad to provide fruits and vegetables for the program. After all, if children eat more fruits and vegetables, chances are parents will be purchasing them from Ted's supermarket. The coalition benefits and Ted's supermarket is given an opportunity to market its products and enhance its image in the community. Ted's supermarket was "invisible" until the skit provided an opportunity for action.

Example:

The coalition recognizes that Mary, a 6th grade teacher, has a special interest in nutrition and physical activity. Although Mary hasn't attended a single meeting, the coalition contacted her to see if she would be interested in including nutrition and physical activity education in her classroom. Mary is interested so the coalition provides resources. Mary becomes an invisible partner by furthering the goals of the coalition. She works with her students to develop a set of "television" talk and game shows to teach them about nutrition and physical activity. Mary even creates the potential for another invisible partner! She arranges for her students to present the "shows" to a daycare center, along with fruit and vegetable samples for tasting. The presentations provide an opportunity for the middle school students to practice learning skills; for the daycare children to learn about healthy eating and activity; and for the daycare operator to become an invisible partner!

Example :

Secure Bank in A. City sponsors an adult fun run/walk at the City's Fall Festival each year. Last year the coalition contacted Secure Bank to see if it would also support a children's fun run. The Bank agreed to the idea, and with the coalition's planning, the event was a success! The Bank was so pleased with the results that on its own initiative enhanced the event by offering funding for playground equipment to the school with the greatest participation in the run! The Bank is an invisible partner, except once a year during the fun run. Through its support for playground equipment, physical activity opportunities are increased all year; the community is more motivated to join in the annual event!

Making sure everyone is having a good time... sustaining participation

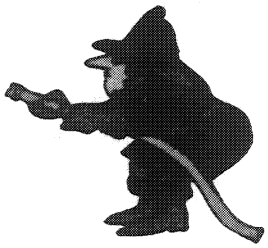
Recruitment doesn't end when the first few people start showing up. Think of this point in recruitment as the time during a party when we need to check to make sure everyone is having a good time. Follow-up is important to make sure the ***win/win*** situations are being met and don't need revising. Use the following suggestions to sustain good participation.

Tips for sustaining good partner/member participation

- Be an organized, efficient leader. Follow through with promises to members.
- Listen to ideas of new members, not just the thoughts of the established team members. Each member must feel ownership/involvement with the initiative.
- Maintain constant communication by mailing meeting minutes, agendas, feedback on action planning, and invitations to functions.
- Make an effort to initiate informal conversations. Developing feedback mechanisms can be the key to future partnering.
- Recognize contributions, regardless of effort or size.
- Offer to scale down requests for contributions or commitments.
- Make different levels of volunteer opportunities available in a variety of areas.
- Remember absences at meetings don't always signify disinterest with the coalition...people may have business obligations.
- Reciprocate support.
- Develop a buddy system between visible and invisible partners.

Be respectful that people and initiatives change, and members may need to move on, or need different levels of involvement within the initiative to keep them and **Step Up and Step Out** "fresh." Changes are just sure to happen in everyday life and aren't necessarily a reflection of dissatisfaction with the coalition.

Encountering Opposition



It is possible to encounter opposition or problems as you are recruiting. Be encouraged! Diversity and differences of opinion make life interesting! You may be surprised to find that some of your most vocal opponents become strong supporters, with time and not much effort on your part.

The following fact gathering questions are helpful for handling difficult people or situations. Once you know the answer to the question it is easier to problem-solve the solutions. You can use them to help train coalition members who may encounter barriers.

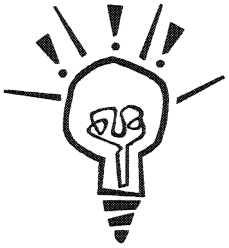
- Is the person expressing opposition adequately informed about the program or coalition?
- What barrier/opposition do they represent or what is their specific agenda?
- Is the person with an opposing view just over-committed and doesn't want to give support to anything that might create more work for them?
- What opportunities to participate have been offered to them? Has it been too much? Are lesser commitments available?
- What is their history with this community and the program? That is, have past issues such as money, politics, or personality conflicts clouded their judgment?
- Does the initiative represent a threat to them? For example, do business owners see a potential market threat in terms of reducing their revenue?

A proactive coalition will identify potential opposition before it occurs. Coalition members may be able to gain support by problem solving with those in opposition. Of course problem solving doesn't always work out on the first try, so keep your options open!

Change, Grow, and Develop

As your coalition continues to grow and develop, stay flexible with member participation and roles. The worst thing that could happen is your coalition would become so dependent on one entity and the resources they bring that they become stretched beyond their means, and "burn out." Keep the distribution load divided as equally as possible so your partners remain fresh, enthusiastic and committed for the long haul.

Coalition members who are encouraged to work in different areas of the initiative will not only experience personal growth and fulfillment, but also cultivate a deeper commitment to the vision, mission, and objectives of your initiative. These members become your strongest supporters and recruiters. Encourage and motivate them to achieve. The definition of team is: Together Everybody Achieves More!



Module Tip:

Begin now to let your community know about **Step Up and Step Out**. Plan a "blitz" of communication and small activities without "overspending" time or other resources, and recruit others to join the coalition. Remember that recognized community leaders don't always have time to devote to coalition activities, however they may still support the coalition without playing key roles. It is helpful to search for "unrecognized community leaders" to provide coalition leadership.

FAQs:

- **Question:** I've been on coalitions before, and it seems like we never did anything but talk about ideas. How will this be different?
  Answer: You have a good point! Things get bogged down when groups don't have a good picture of how they want their initiative to look. Begin taking specific action steps as you plan to keep things moving.
- **Question:** Can a partner be both visible and invisible?
  Answer: Yes. Depending on the partner's personal and work responsibilities at the time, a change in commitment to the coalition may be required. It is not uncommon to see a swing back and forth between the two partnership types, and your coalition should encourage both.
- **Question:** Is it better to recruit only visible partners, so we can show off the size of our coalition?
  Answer: Never discount the power or influence of an invisible partner. Your coalition needs both styles to accomplish its goals.
- **Question:** How many partners/members do we need to recruit?
  Answer: You should have at least 1 person representing each area of focus: Community, Nutrition Education, Physical Activity, and School Meals. 12-15 members is a good size.

Module Glossary:

Coalition: The team that is formed. "A joining of individuals, groups, and businesses with a shared goal of creating changes together that would be impossible independently."
Community review: A process to identify community strengths and areas for development. It provides information to make decisions about taking actions for improvement.
Invisible Partners: Partners who do not regularly attend coalition meetings but believe and support the coalition.
Member: An individual who shares a personal interest with the coalition.
Partner: An established agency, organization, or business that has interests compatible with the coalition.
Visible Partners: Partners who are active in planning and initiating coalition actions.
Win/win partnership: A partnership in which each partner, member, and the coalition benefit from the relationship.

Event Planning Tool

Example:

Following is an example of a **Step Up and Step Out** awareness activity.

Title Of Program/Project/Event: (check type of activity along with title)
☒ Media ☒ School ☐ Business ☒ Community **"Step Up and Step Out Wave"**

Target Audience/Numbers Forecasted: (check all planned for your activity)
☒ Students 125 ☒ Parents 225 ☐ Teachers___ ☐ School meal director and staff ___
☒ School administrators/board members 10
☒ Business/community leaders/community at-large 40

Outline/Description/Objectives:
Create awareness of **Step Up and Step Out** with a "wave" during half-time at the 9/22/02 football game
1. Provide an announcement for game's broadcaster (Karen)
2. Work with cheerleading coach and cheerleaders (Karen)

Marketing Plan:
1. Contact local paper for coverage (Jim)
2. Contact local businesses to take out an ad supporting **Step Up and Step Out** on the football program (divide between Mary, Jim, and John)

Permits Or Permissions Required:
Resource Materials/Supplies/ Handouts/Food/:
Talk with Principal Shore before planning to get permission

Costs/Funding Source:
$5.00 printing costs for information sheet to be given to businesses

Manpower Needed:
Assignments made above
No other manpower needed

Space/Time/Date Requirements:
Ads to be sold by 9/10/02

Prep Time:
Estimate 3 hours each person for ad contacts
Estimate 3 hours coordinating

Alternate Plan:
None needed

Comments:
It will be a fun "kick off" and a way to get people active!

Event Planning Tool

Use this tool to plan each of the 2-4 **Step Up and Step Out** awareness events/activities in the next 6 months.

Title Of Program/Project/Event: (check type of activity along with title)
☐ Media ☐ School ☐ Business ☐ Community

Target Audience/Numbers Forecasted: (check all planned for your activity)
☐ Students ☐ Parents ☐ Teachers ☐ School meal director and staff
☐ School administrators ☐ Business/community leaders/community at-large

Outline/Description/Objectives:

Marketing Plan:

Permits Or Permissions Required:

Resource Materials/Supplies/ Handouts/Food/:

Costs/Funding Source:

Manpower Needed:

Space/Time/Date Requirements:

Prep Time:

Alternate Plan:

Comments:

Recruiting Worksheet

Use this worksheet to begin your recruiting plan. Check the following steps as you complete them.

- ❑ Potential partners/members are identified
- ❑ Appointments are made
- ❑ Win/win situations are identified

Potential partners/members	Phone number and appointment date	Win/win situation

Additional Practice Activity

Read through the following two scenarios to identify the application of positive recruiting skills and the "oops" recruiting actions.

Recruiting Scenario I: Terri Teacher

Happy City began **Step Up and Step Out** about a year ago, and a community coalition has been active for nine months. Susie Initiative Coordinator has worked diligently to get the elementary teachers involved in the initiative. Susie is an insightful person and sees opportunities readily...often more readily than those around her. Susie recognizes Terri Teacher is an innovative, enthusiastic teacher and has been leaving notes at school to involve her in the coalition, but Terri has not responded to Susie's attempts to get her involved.

Positive recruiting actions:

1. **Susie recognized Terri's skills**
2. **Susie tried to establish communication**

Terri Teacher has a family history of heart disease, tries to encourage her family to eat a healthy diet, and be physically active on a regular basis...a perfect fit for the initiative. However, Terri does not understand the school lunch program very well, and does not get along with the food service director. In fact, Terri is very vocal and outspoken regarding her negative feelings about the program. She thinks the menus are too high fat, too many convenience items are served, and that if the school lunch program is part of **Step Up and Step Out**, then she wants nothing to do with it.

Positive recruiting actions:

1. **Susie took time to learn of some of Terri's interests**
2. **Susie became aware of Terri's conflicts with food service**

Susie waits outside Terri's classroom one day, to ask why she won't be on the coalition to help make a difference for the kids. Without waiting for a response, Susie describes several projects, events, and programs that Terri could get involved with immediately. Terri gets defensive and tells Susie she wants no part of the initiative. Susie leaves feeling dejected, personally attacked, and like she must carry on the cause all by herself. Terri leaves feeling guilty for not helping out, but frustrated with Susie for asking so much of her when she is already so involved with other volunteer positions at school, and besides, doesn't Susie understand what a mess the school lunch is?

"OOPS" recruiting errors:

1. **Susie didn't ask for an appointment**
2. **Susie didn't address Terri's conflict with food service**
3. **Susie wasn't sensitive to Terri's time and other commitments**
4. **Susie should have come prepared with a win/win situation for Terri**

A better scenario:

Susie has some funding for a special project that involves recipe development, menu planning, and taste testing for the school meal program. She proposes that Terri's class participate in the project.

The class has a guest speaker from school food service explain regulations for meal planning, fat, and calories. The students are given references, ideas, and guidance to develop or identify recipes they will taste test before making recommendations to the food service director.

New recipes are incorporated over a three-month time period and during that time students do lunch room surveys and conduct plate waste studies to determine acceptance of the new recipes. The students document their findings and make additional recommendations to the food service director

After receiving the information, the food service director follows-up with the class to let them know of her final decisions regarding the new menus. She explains the YAC (Youth Advisory Council) and gets input as to how it would work for their school. She encourages them to get involved with YAC.

As for Terri Teacher, she has a much better working knowledge of the school meal program, requirements, constraints, and needs. She feels like she and her students made a difference. She is no longer negative and vocal about school meals, and she is able to participate in the initiative at a level her time permitted. Terri's creativity and motivation skills led to student enthusiasm, new recipes for the menu cycle, and support for the newly formed YAC. Terri feels good and Susie is delighted to have delegated a project and gained a new supporter.

Additional Practice Activity

Recruiting Scenario II: Barney Beef

There is a coalition meeting tonight, only the second time the group has met. Barney Beef, the manager of a local, rather large cattle feed yard, has been invited because a coalition member thought he would be a good partner. Barney is at the meeting but no explanation has been given to him as to why he is invited or his possible role in the coalition prior to the meeting.

Susie Initiative Coordinator is thrilled Barney is attending the meeting. Barney would be a great addition to the coalition—he represents big business in the area and could be involved with nutrition education for families—he could possibly help out financially—he is a leader locally, and statewide in the beef industry!

Barney arrives at the meeting thinking, "This dang school health initiative is going to try and take beef out of the school meal program, and start a 'don't eat beef campaign'. I'll attend their meeting all right! I'll tell them what's what!"

The rest of the meeting is history. It was a disaster with Barney criticizing every discussion, and Susie feeling very defensive.

Positive recruiting action:

The coalition invited a very good community partner to the meeting

"OOPS" recruiting errors:

The coalition didn't give Barney an explanation of a possible coalition role or determine his knowledge of the initiative

A better scenario:

- If we can't turn back the clock to handle the situation differently, is it still fixable? Yes, Susie needs to avoid being defensive. She needs to ask Barney to stay after the meeting to address his concerns. Barney is a good candidate for the coalition team. It is best to meet conflict head on—to compromise and work out solutions.

- Susie would spend time with coalition members prior to recruiting to review recruiting tips, including,
  1. An explanation of the purpose of the coalition.
  2. Expectations for Barney's involvement.
  3. An opportunity for the recruit to express concerns prior to attendance at a meeting.

- Susie could talk with Barney before the meeting and determine whether or not he has concerns. If she knew he felt his business was in jeopardy, she could explain that there are no good food or bad foods to dispel his fears.

- Once Susie learns of Barney's concerns, she develops a plan to create a **win/win** partnership:
  1. She arranges for Barney to provide beef to the school district at a lower cost.
  2. Barney makes reliable nutrition education resources available to the school.
  3. Barney arranges for the beef industry to provide the school lunch staff with low-fat beef recipes.
  4. The school meal staff increases student contact by having the Youth Advisory Council taste test the recipes.

Chapter 1 *Building the Coalition*

Module 2: Coalition Structure

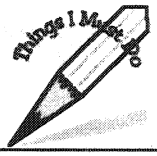
Step Up and Step Out to build structure!

The first steps have been taken. The coalition has an idea of purpose and coalition members have been recruited. It is time to begin thinking about how the coalition will be structured to guide, manage, and implement future actions.

There are three different issues to consider at this point:

1. Organizational structure—whether or not committees are set up and how decisions are made
2. Meeting structure
3. The roles people will play

Organizational structure styles



There aren't rules that must be followed and you don't need an "architect to draw up the plans," but your coalition's "house" needs some structure. The best structure is the one that feels most comfortable, whether it is a "castle" or a "cabin!" Structure styles are discussed below.

Consider structure:
1. **One large single group with equal division of responsibilities**
2. **A coalition composed of committees with different functions**
3. **A coalition composed of task force groups and committees**

1. **One large single group with equal division of responsibilities. Everyone has equal input, responsibility, and authority.**

This style has very little structure. It works best for small groups where everyone shares everything equally.

Example:

The coalition decides to setup a booth at the city's health fair. The group divides up responsibilities so that everyone shares the load. Mary does publicity, Joe calls volunteers to staff the booth, Sue organizes the display, and Jim takes care of setup and cleanup.

2. **A coalition composed of committees with different functions. Committees could be arranged by activities such as marketing, recruitment, accounting, fundraising, education, or program development.**

This structure is more complex. There are permanent committees formed within the coalition that assume responsibilities related to their function.

Example:

The coalition is contacted to determine whether or not there is an interest in setting up a booth for the city's health fair. The coalition determines the health fair fits as a marketing function and refers the issue to Betty who is the Education Committee Chairperson. Betty meets with the Education Committee to plan and staff a booth.

3. **The coalition is structured with task force groups and committees. A task force is a subgroup of the coalition—it can be an *ad hoc* (temporary) or a permanent committee. The task force can be created for:**

- Specific activities, i.e., a health fair, fun run, or supermarket tour
- Target audiences, i.e., elementary students, parents, and athletes
- Functions, i.e., marketing, fund raising, volunteer, or recruitment

Another option is to consider task force groups for each of the four components:

- **Community**—A group to coordinate opportunities for healthy eating and physical activity, provide support for school actions, and coordinate communication/marketing actions
- **Nutrition Education**—A group that includes teachers, school board members, school administrators, and parents of school-age children to address school curriculum actions
- **Physical Activity**—A group that includes physical education directors, school administrators
- **School Meals**—A group that includes the food service director and school administrators

This coalition structure is the most complex and has the most "layers" of responsibility.

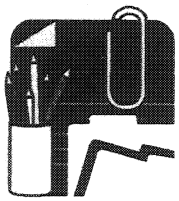
Example:

A permanent task force has been created by the coalition to identify community awareness opportunities. When the "Community Awareness Task Force" identifies an upcoming health fair as a good opportunity, the coalition creates an "ad hoc" (temporary) committee for the purpose of planning and staffing a booth. Once the health fair is over, the "ad hoc" committee no longer exists.

A note about advisory groups

Coalitions are sometimes formed to function as an Advisory Board. This is not desirable in the case of a school health initiative. Advisory boards do not take action, and as a result, progress can be very limited. It will be helpful to keep in mind the following distinctions:

- **Coalition:** The coalition is an active, decision-making group. The coalition takes responsibility for seeing that a strategic plan is developed and takes action on the goals it sets. It answers to the community-at-large.
- **Advisory Board:** An advisory board listens to members, makes recommendations, provides support, and provides a place to network. It takes no action on its own. The task forces (or committees) that report to the advisory board normally take actions. The advisory board has no authority over a task force. This often results in a lack of vision and mission with less coordination of efforts.



Meeting structure

Meetings can be set-up either formally or informally. Community factors and personalities of the key organizers will dictate the style of your coalition's meeting structure.

One coalition may decide they work most effectively with formal meeting structure and a "boardroom" type of atmosphere.

Example:

Members attend meetings in "business dress" and the structure follows predetermined "rules."

Another coalition may prefer to structure their organization very informally.

Example:

Members meet in very casual dress for coffee, or after work, or network over the phone or by e-mail.

More complete descriptions for these structures are given below.

Formal organizational structure:

- Elected officers
- Written by-laws
- Established responsibilities
- Established chain-of-command with specified task forces or committees

Formal meeting structure:

- Organized under *Robert's Rules of Order*
- Formal voting procedures and rules
- Formal, written agendas including time limits
- Written reports and minutes
- Set meeting schedules—open to the public

Informal organizational structure:

- Less formal or unwritten "rules" for conducting business matters
- An informal chain-of-command

Informal meeting structure:

- Less structure for meeting agendas with time allowed for agenda changes and open discussion
- Minutes, reports, agendas may or may not be written
- Meeting schedule varies with needs and availability of group
- Informal discussion format at meetings
- Decisions reached by consensus vs. formal votes

Building communication into structure

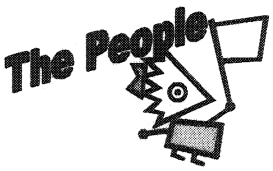
Whatever your structure, it is critical to effectively build in the methods that provide the best means to communicate meetings, minutes, announcements, events, and plans! Use postcards, letters, e-mail, phone calls, newsletters, or anything else that comes to mind!

To sum up structure

Structure does not have to be complicated. It is desirable to keep the nature of your coalition simple and flexible, without sacrificing organization. An excessive number of levels, task forces, and committees:

- Complicate efforts
- Increase the number of steps required for change
- Increase time needed to take action
- Make communication more difficult

An effective coalition structure will have very few bosses, and a large number of team players to carry your initiative's mission.



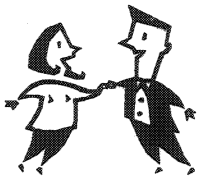
Key Roles within the Coalition

While contributions by all coalition members are critical to the initiative's success, a "core" group of organizers and several key roles will drive the coalition and determine its structure. Key roles in **Step Up and Step Out** are:

- Initiative coordinator
- Formal leaders
- Informal leaders

The initiative coordinator

The initiative coordinator serves as an organizer and catalyst for action. This person facilitates a wide variety of activities and responsibilities to keep the initiative moving forward with its actions. Although the role is key, the initiative coordinator works with other coalition leaders to share responsibility for coalition outcomes.



Organizers will want to choose this individual carefully. A good coordinator effects coalition success.

Initiative coordinator functions include:

- Network throughout the community to identify and assist with recruiting of new coalition members
- Coordinate and gather community information, including listening sessions
- Set-up staffing for clerical functions and meeting organization, i.e., developing agendas, determining meeting location, typing/distributing minutes, data collection, reports/updates, and other details
- Assist with establishing the structure of the coalition
- Assist with coalition goal/action planning
- Facilitate (see Module 5 in this Chapter for traits of a good facilitator)
- Identify win/win situations to promote benefits for participation in the coalition
- Assist with the development of a marketing plan
- Market the coalition and communicate actions throughout the community and region
- Help identify and problem-solve issues that make initiative actions difficult

"Super person?"
Does it sound like the coalition will need a "super person?"

This position does need a person who is a great organizer, but if the coalition does a good job of recruiting leaders and other members, there will be plenty of people to delegate responsibilities and actions!

Information about how to get leaders "on board" follows!

Step Up and Out to recruit and develop leaders!

1. **As you recruit, look for individuals who motivate others to take action**

   Look for people who can cause others to take action rather than those who just "do" it themselves. A good manager isn't necessarily a good leader. Good managers too often do everything themselves and they burn out quickly. A leader must be able to delegate and develop new leadership.

2. **Recruit formal and informal leaders**

   Most organizations have both formal and informal leaders. Both of these types of leadership are very important to the coalition. The formal leader is often the "recognized" leader and the informal leaders are the ones who always seem to "be there" meeting and greeting, and getting things done. The following traits will help to distinguish each:

Formal Leaders:

- ♥ Recognize facilitators who manage meetings, problem-solve, and move participants toward action
- ♥ Provide administrative support
- ♥ Coordinate financial support where appropriate
- ♥ Coordinate communication
- ♥ Make decisions

Example:

Ted is frequently the "peacemaker" at Our Town coalition meetings. When the coalition was split on whether time should be divided between a health fair and a fun run, Ted helped everyone go through the pros and cons of different options so that they could reach a decision. Ted has problem-solving skills and should be developed as a formal leader.

Informal Leaders:

- ♥ Provide support for formal leaders
- ♥ Play key roles in modeling, guiding, and encouraging
- ♥ Create action

Example:

Martha just loves to talk on the telephone. She frequently calls people after a coalition meeting just because she likes to visit about the outcome. Martha

could really be an asset in encouraging members and should be developed as an informal leader.

3. Recruit people who are key business or community decision-makers

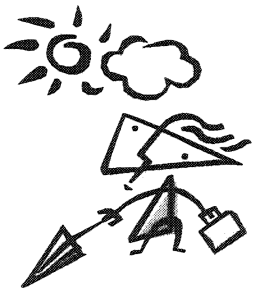
People who are "in power" don't have to ask permission from someone else, so they make it possible for the coalition to take actions faster.

Example:

The owner of a hardware store can make a decision to participate in a community-wide "billboard" awareness campaign for healthy eating and physical activity, but an employee of the store, will need to go back to the owner and determine if there is an interest.

4. Make leadership recruiting and development a continuous process

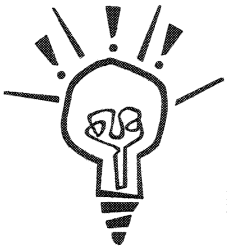
It would be great if you didn't need to worry about developing leaders...if coalitions could just operate with all participants involved as equals in decision-making and problem solving. Different mixtures of people, groups and power, make it necessary however, to find leaders who can unite people to share and direct the coalition's vision and mission. Take time to develop your leaders!



Leadership Roles

Leadership roles will vary somewhat according to the structure, mission, and goals of the coalition, but leaders often serve by:

- Creating a positive attitude
- Developing a commitment to success
- Motivating and encouraging members
- Introducing and welcoming new coalition members; and recognizing their involvement
- Maintaining the vision and mission in strategy development
- Anticipating or clarifying what kind of work is needed in order to accomplish organizational goals
- Sharing work and recognition with colleagues



Module Tip:

There is no "right or wrong" structure for your coalition. The organization that works best for your coalition is the style that fits your community's size, resources and scope of the initiative's mission.

FAQs:

- **Question:** Is it okay for the structure of the coalition to change as the coalition develops?
- **Answer:** It is not only acceptable, but also normal to go through several variations on style until the coalition finds something comfortable.

- **Question:** How can you get people to step forward to assume leadership roles?
- **Answer**: Everyone needs recognition and reward for their efforts. Look around to see if partners are given recognition for the things that they do, and potential leaders are given support whenever possible. Keep in mind successful coalition outcomes also motivate greater involvement.

Module Glossary:

Advisory board: A group that listens, make recommendations and provides support, but takes no action on its own, and has no authority over coalition task forces or committees.

Task force: A subgroup of the coalition that is developed for specific activities, functions, or target audiences.

Ad hoc committee: A short-term committee with a very specific function and limited time commitment.

Action! Leadership Worksheet

Is Your Coalition in a Good Position to Develop Leaders?
The following worksheet lists organizational structure factors that need to be in place to develop good leadership. Go through the following questions as a checklist to see how your coalition is doing and what you might need to work on.

1. Ask each question. If the answer is yes, place a checkmark in the box. A yes indicates no further action needed. An unchecked box means "no" and indicates there is a possible problem to reaching full leadership potential. These issues need to be addressed.
2. Write comments below each category as appropriate to use for future problem solving.
3. Take steps to identify problems and plan actions for improvement.
4. Take actions and check for effectiveness. Revise plan for action if necessary.

Meeting attendance

- ❑ Are meetings held often enough for the group to complete its tasks?
- ❑ Do members attend regularly?
- ❑ Do people participate just because the coalition's actions relate to their job?
- ❑ Are barriers to participation overcome?

_____
_____
_____
_____
_____
_____

Communication

- ❑ Is communication strong, including communication with those not at meetings?
- ❑ Is the role of each participant in the coalition clear?
- ❑ Are the coalition and participant's expectations for attendance, participation, and commitment clear?

_____
_____
_____
_____
_____
_____

Recruitment

- ❑ Does the coalition combine recruiting from professional ranks and the general public?
- ❑ Do existing coalition leaders provide modeling, guidance, training, and new leadership development?
- ❑ Does the coalition expect only the amount of work or commitment members are willing to provide?
- ❑ Do new coalition members have the opportunity to take leadership roles?
- ❑ Do old and new leaders understand the initiative's mission?

_____

_____

_____

Coalition actions

- ❑ Is the coalition active?
- ❑ Do actions go beyond meetings and reach out into the community?

_____

_____

_____

Leadership skill development

- ❑ Are successors recruited and groomed to take over leadership positions?
- ❑ Are the leaders competent in bringing about what needs to be done?
- ❑ Do leaders manage meetings well?
- ❑ Are leaders able to complete meeting actions or goals?

_____

_____

_____

Action! A Role-Play Activity

Role-playing the coalition meeting at Anyville Elementary will provide an opportunity to identify and practice leadership skills.

Characters:

Supra Sidney, Initiative Coordinator	Timid Tina	Boisterous Bertha
Know it all Nathan	Friendly Fred	3 new members

Assign eight different coalition members to role-play the above "characters" and use the following scenario to act out an imaginary coalition meeting. After the role-play, use the questions that follow to discuss potential leadership skills.

Opening Scenario:
Members are arriving at Anyville Elementary for the Monthly Coalition meeting.

Supra Sidney is setting up the overhead projector to present her plan for a new community program. She has talked with the town librarian and recreation commission about combining resources to start a Saturday morning program that combines healthy reading activities with fitness activities. She is nervous because she really wants to convince the rest of the coalition her proposal will be an outstanding program to get more people involved.

Friendly Fred is going around the room, introducing himself to the new members, and asking each what brings them to the meeting.

Boisterous Bertha is complaining to **Supra Sidney** about the new school lunch policy that allows children to decline milk on their tray while Supra is trying to set up.

Know-it-all-Nathan is telling **Timid Tina** about how they really need to get on the stick and just organize a committee to change all of the vending machines in school.

1. Supra is acting as a 'doer', not as a catalyst for change. Why is it important for her to facilitate and delegate rather than 'do'?
2. What identifies Friendly Fred as an informal leader? In what way could he become an asset to the coalition?
3. In what way could Supra direct Boisterous Bertha's concerns for a positive outcome?
4. How could Know-it-all-Nathan be directed for positive outcomes?

Comments:

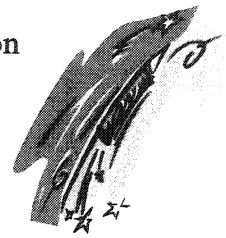
- Supra hasn't asked other coalition members to participate in program planning. She should have arrived early to set-up the projector so she would be free to greet and visit with members as they arrive.
- Fred appears to be a natural "recruiter." His skills could be developed.
- Supra needs to acknowledge and direct Bertha positively instead of ignore her. Bertha may be able to take a lead with school lunch.
- Know-it-all-Nathan needs development as an informal leader to head a committee to review possible vending machine changes.

Chapter 1 *Building the Coalition*

Module 3: BOOM – Building Outcome Oriented Meetings

Step Up and Step Out to build outcome oriented meetings!

Ready? Get set! BOOM!! Go! You are ready to begin your first coalition meeting and want it to be as effective as possible in the time you have.



BOOM—Build Outcome Oriented Meetings

Have you attended a meeting and wondered afterward if anything was accomplished? Runaway meetings are not fun for the meeting's organizers, or anyone else!

Your coalition will conduct many meetings over the life of the program. Just how many and how often depends on the size and scope of your coalition. Regardless of frequency, you want each meeting to result in good outcomes. Organizing, coordinating, and conducting meetings with a diverse group of volunteers can be a challenge, but is much easier when key actions are identified!

Action steps for planning a "BOOM"

Meetings with successful outcomes incorporate five key actions:

- Brainstorm
- Plan
- Organize
- Facilitate
- Delegate
- Mobilize

Step Up and Step Out to use brainstorming techniques!

Meetings, particularly in the beginning stages of coalition building, should include "brainstorming" sessions.

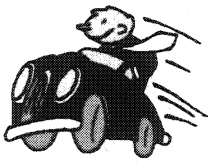
Why brainstorm? The process is a fun and creative way to identify issues, ideas, objectives, and problems that will play a role in your initiative. Depending on your coalition's style of operation, these sessions can be formal or informal. Whatever style you elect, the rules are the same:

- Everyone participates and is made to feel they are part of the group
- All ideas are good; they don't have to be complete or thought out
- Everything should be considered—don't worry about whether or not it is realistic
- All participants will have the opportunity to talk

Not only is brainstorming a low-cost method to develop programs and concepts, but the creative process allows members an opportunity to interact on a more informal basis. This serves to promote greater understanding among diverse members and helps strengthen the team.

Mobilize brainstorming ideas

Brainstorming gets the engine going with ideas. Putting those ideas into action is the next step...and a very important one! It is very motivating for members to see their ideas create results! Use the following guide as the first step to mobilize:



1. Collect and summarize all of the ideas
2. Determine the feasibility of each idea
3. Prioritize ideas using the following methods, or others
4. Use the initiative's vision and mission (described in **Chapter 2: Action Planning**) to complete this entire process)

"Picking Apples"

One process for prioritizing brainstorming ideas is called "picking the low hanging apples (or fruit)." It is based on the concept of selectively taking apples off the tree by picking the easiest to reach fruit first then working up to the higher points on the tree. Therefore, less energy and resources are used gathering fruit that is the easiest to reach.

Your coalition can establish priorities and resources based on picking apples. What activities and programs will provide the greatest impact to the largest audience while using the fewest resources and energy? These are decisions your coalition will need to decide.

Voting to Prioritize

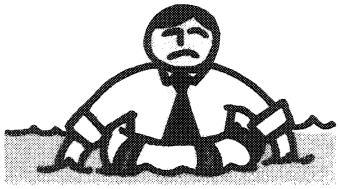
Another process for prioritizing involves using a voting method whereby:

1. From a master list of ideas, each member selects three - five ideas of interest to them;
2. Each member then assigns a number...1, 2, 3, etc...to each of the ideas they selected, which rates their priority in terms of importance and feasibility;
3. Then each member places the numbers they assigned to the ideas on the master list;
4. The numbers are totaled and rankings are determined.

Note: Different colored dots can also be used to replace the numbers for rankings.

After voting is complete, a priority list is created and circulated to all coalition members for input. Additionally, input should be gathered by conducting surveys and using listening sessions with the coalition's target audience.

Plan Meetings for the Best Outcomes



Incorporating the following suggestions will help keep your meetings "afloat!"

Plan and Organize prior to the meeting:

- Obtain agenda items from coalition members and others well in advance
- Establish a meeting time and location
- Send a written agenda in advance of the meeting
- Assign agenda items priority and estimated time allowances

Facilitate at the meeting:

- Start and stop meetings on time
- Assign a timekeeper for each meeting
- Begin meetings with updates/progress reports
- Record minutes
- Plan time at the end for unfinished business or additional agenda items
- Present reports/input from absent coalition members when appropriate

Delegate at the meeting, or as soon as possible following the meeting:

- Designate individuals responsible for completing action steps
- Clarify actions individual(s) will complete and set target completion dates

Mobilize after the meeting:

- Send minutes to members, whether present or absent, as soon as possible
- Directly contact absent coalition members by phone, e-mail or in person, ***in addition to*** sending them minutes
- Follow-up on decisions, actions to be taken, and future plans

Example of facilitating, delegating and mobilizing:

Facilitate: A coalition decides at one meeting to take action on a school district sponsored fitness day that would also include healthy snack ideas. There are several absent coalition members who have expressed an interest in being involved with physical activity.

Delegate: The absent members are sent information about the proposal along with a post card requesting that they reply to indicate a level of interest for involvement.

Mobilize: In addition, a coalition facilitator, contacts the person who has agreed to be the lead on this event one week after the meeting to determine progress and to check on whether or not assistance is needed.

Step Up and Step Out to develop facilitation skills!

Outcomes depend on how well meetings and goals are facilitated. Ideally, there are multiple coalition leaders, however, one of the leaders will need to assume the role of "facilitator." Many facilitators fall short or fail in their efforts because they 'do' rather than facilitate. The table below lists some of the various behaviors of a "Good vs. Poor Facilitator."

Good Facilitator	Poor Facilitator
1. **Skilled communicator** • Updates partners • Identifies necessary steps • Communicates effectively verbally & in writing	1. **Poor communicator** • Doesn't express thoughts & concerns • Worries about necessary steps
2. **Skilled listener** • Listens to needs, ideas, & concerns • Gives feedback	2. **Poor listener** • Interrupts • Does not give feedback
3. **Skilled negotiator** • Problem solves • Creates win/win situations	3. **Poor negotiator** • Lets problems overwhelm • Allows others to dictate • Only sees one option
4. **Skilled mediator** • Includes everyone • Respects all points of view	4. **Poor mediator** • Ignores individuals • Disregards different points of view
5. **Skilled coordinator** • Assists with timelines • Pulls together resources • Has good organizational skills • Identifies necessary tasks	5. **Poor coordinator** • Is disorganized • Works without a plan • Uses "Seat of the Pants" management • Uses crisis management • Gets frustrated • Does not delegate
6. **Skilled planner** • Identifies timelines & outcomes • Identifies target audiences • Identifies resources & barriers	6. **Poor planner** • Just assumes it will get done • Does not budget time & resources
7. **Skilled motivator** • Makes a point to include people • Provides recognition • Matches skills and talents with goals	7. **Poor motivator** • Is concerned with power • Doesn't recognize talent & individuality • Accepts status quo • Dictates direction • Retains control of all tasks
8. **Skilled cheerleader** • Publicly thanks and recognizes people • Maintains a high level of enthusiasm • Has a "can do" attitude • Offers support • Recognizes concerns	8. **Poor cheerleader** Congratulates self instead of others • Fails to recognize contributions of others • Doesn't see a need to thank others publicly • Loses sight of contributions of others due to extreme outcome focus

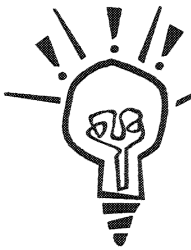
Step Up and Step Out to delegate and mobilize!

Always remember that the school health initiative involves all of its components. Successfully managing, creating and implementing a large initiative requires people and initiative management. One or two people cannot do it all!

When you have people with similar interests working together, you create a successful atmosphere. If only one person, or a small handful of people accepts responsibility for most of the actions, burnout comes quickly, ownership is held by a small number of people, and ideas die. Delegating and developing opportunities for people to volunteer in the manner that works best for them allows for mobilization. Find the right "niche" for a person's interest, and you will be amazed at the number of people you can involve.

Example:

Mr. Tye is asked by the coalition to volunteer time for organizing "latch key" basketball games after school. He declines the request, but after some conversation a coalition member learns Mr. Tye's hobby is working on his computer and she makes a note of it. Several weeks later when a discussion came up about creating a newsletter, Mr. Tye was contacted for ideas, and he became the new editor!



Module Tip:
A good facilitator is a skilled listener that uses open-ended questions, summarizes statements, asks for feedback, doesn't interrupt, uses good body language and is respectful during all conversations.

FAQs:

- **Question**: Is it difficult for someone who does not have good facilitator skills to acquire them?
  Answer: Listening skills come more naturally for some people than others. Finding a facilitator who has at least some of the skills leads to even better teamwork and successful outcomes. Encourage all members to improve facilitation skills by practicing with the list in this module.

- **Question:** How is the success of a meeting measured?
  Answer: The answer varies, but it is found within your agenda. Meetings are likely to be a success if you take the time to:
  1. Plan and organize a good agenda
  2. Address everything on the agenda
  3. Make decisions
  4. Delegate actions
  5. End on time

Module Glossary:

***Brainstorming*:** A round-robin process whereby everyone provides input.
***Facilitator*:** An individual who uses various techniques to ensure that meetings run smoothly and have good results.
***Mobilizing*:** Putting factors in place to prompt action.

Action! Facilitating/Delegating Worksheet

Facilitating and delegating does not end with meetings. The following scenario leads you through the events of a project that results in disappointment. Use the following steps for recognizing how facilitating skills can significantly impact results:

1. Read through the "Inability to Delegate" scenario.
2. Discuss the questions provided at the end of the scenario. Write notes on your suggestions.
3. Review the discussion that follows the questions and compare the suggestions there with the ones you have written.

The Inability to Delegate Scenario:

Sherry has been initiative coordinator for almost a year. She has coordinated numerous classroom taste-testings, a school assembly, and an expansion of physical activities for latch key students. She is especially proud of the fact that last summer, she came up with an idea for an "Eat Healthy for Physical Activity Week" that received statewide recognition! It took many months to make contacts, plan, organize, and implement, but the way in which it was received made it worthwhile! There are plans next year to repeat it, so, recognizing how much work is involved, she has decided to tone down some of the other things she has been doing.

Several weeks ago the food service director and a teacher approached Sherry with an idea for a project that would require a significant amount of Sherry's time. They asked if Sherry would coordinate a "Go Green Week." The thought was to fill the week with classroom activities, a special cafeteria menu, and special physical activities in PE. Sherry didn't really care for the name they came up with, and wasn't happy about how much time it might take to plan, but they were so excited, she just couldn't say no!

Sherry started planning on Monday. She felt pushed for time and decided she would make just make all the arrangements since it would just take too much time and effort to find someone to help and then explain everything. Besides, she wasn't sure what she wanted them to do, because she would need to make sure everything was done correctly anyway.

Sherry pulled out some activities she had on file, wrote a memo to the teachers, explaining there would be a "health" week, and that they should plan to do the activities she was attaching. She then scheduled a meeting with the PE teachers to discuss physical activity plans; and searched for some posters and artwork for the cafeteria promotion. On Tuesday, she met with the PE teachers to give them the activities, and reassure them she would be able to provide the materials needed for the Bean Bag/Pyramid Throw even though she really didn't have time...but there wasn't anyone else who could do it.

Wednesday, Sherry felt pretty comfortable that everything was set for the following week. She checked with food service to see which day they were planning the special meal and wrote an article for the school newspaper about the "Health Week."

"Health Week" came and went without much fan-fare. Several teachers did participate in the activities but participation was not even 20%, and only a couple of the PE classes were able to use the beanbags and pyramid Sherry had taken so long to make. School lunch had their green things, but the students didn't seem very interested. Sherry felt that the whole thing had been a bad idea and that the time she didn't have to begin with was now wasted.

Question: What went well and what didn't?

1. Which qualities make Sherry a good initiative coordinator?

_____
_____
_____
_____

2. Identify the actions Sherry took that might have doomed the initiative from the beginning. **Note:** There are at least six-seven actions that might be identified.

_____
_____
_____
_____
_____

3. What could Sherry have learned from this experience?

_____
_____
_____
_____
_____
_____

Positive planning actions:

- ♥ Sherry developed her own time-line.
- ♥ Sherry's communication was good although not always honest.
- ♥ Sherry made sure all materials were available for the appropriate person.

"OOPS" planning actions:

The "Go Green" Week started on shaky ground because

- ♥ Sherry didn't have time to coordinate the project and wasn't honest with the food service director and teacher from the beginning
- ♥ There wasn't enough time or effort to involve classroom teachers, the art teacher or food service in the planning process. As a result, participants didn't have an opportunity to build the anticipation and excitement that comes from creating.
- ♥ Sherry was stressed by time constraints, and couldn't create enthusiasm in others when she didn't feel it.
- ♥ The food service director's name for the project, "Go Green" Week shouldn't have been changed without mutual agreement.
- ♥ She turned off the PE teachers by complaining about having to "do it all"

A better scenario:

- ♥ In the beginning, Sherry should be honest with the food service director and teacher about not having time. She should ask to schedule a later date that would fit her schedule better, or arrange enough time to find someone else to coordinate the project.
- ♥ Sherry should delegate just a few tasks to help reduce her stress level!
- ♥ Sherry learns from this experience by evaluating her true motives for not delegating.
    - She realizes she tends to maintain control as a power issue, or to receive recognition. She also learns she has a difficult time accepting and coordinating ideas that aren't hers and takes steps to change that.
    - She also finds estimating time needed for planning in order to determine when and how to delegate is a problem for her.
- ♥ Sherry recognizes that martyrs don't build good relationships and doesn't complain to the PE teachers during a time of stress!

Chapter 1 *Building the Coalition*

Module 4: Building Teamwork

Step Up and Step Out to build a strong team!

Coalitions are more effective when members and partners form a strong team. With good teamwork there is a sense of belonging...a social reward for involvement...and a pride in accomplishment.

How do you build a strong team? Cheerleaders help set the stage for excitement and support by pumping everyone up, getting fans involved and creating momentum to keep the effort strong.

But even the best cheerleaders can't create a winning team if there isn't a good game plan. The following actions are the game plan that builds teamwork!

Actions for building teamwork

1. **Communicate**
2. **Plan**
3. **Recognize**
4. **Build personal commitment**

Communicate

Communication is critical for people to become aware of the coalition and its progress. It should be consistent and accomplished in different ways...through newsletters, newspapers, phone calls, and e-mails. Communication can also take the form of reports, updates, and articles, as well as casual or formal conversation.

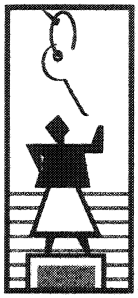
Effective communication does more than keep people aware of coalition actions:

- Member/partner expectations become more clear with two-way communication so that **win/win situations** can be identified
- The diversity of attitudes and goals becomes easier to recognize and address in coalition planning

Communication helps to:

- Prevent miscommunication
- Keep action items from falling through the cracks
- Provide opportunities to identify concerns

Communication with schools



Communication across the community is important. Because of the significant role schools play in the initiative, extra attention should be given to using communication to build very strong teamwork there. A school system can almost be thought of as a small community within itself, creating communication challenges. A good communication link connecting administrators/board members, teachers, physical educators, and food service staff is as important for the initiative as is communication between the coalition and all the school groups.

Plan

Planning is necessary to develop actions steps that are so clear and well detailed that they can be easily communicated. When team members can see action steps taken they recognize progress is being made. When actions result in success... there is another score for the team! Planning for ways to measure success will be important...otherwise how will it be recognized?

Planning is also necessary to incorporate the **win/win** situations that have been identified as being a key to coalition success. Taking time to plan solutions everyone can feel comfortable with is equally important. A coalition stands a very slim chance for success and survival when team members are divided.

Recognize

It is important for cheerleaders to create team spirit by making people feel part of a group, but it is equally important to recognize individual contributions and accomplishments. The team spirit is diminished when team members feel "left out" or "unappreciated."

Coalition leaders should be committed to making recognition a habit.

- Recognize partners and let them know they are appreciated at every opportunity
- Recognize to provide one of the least expensive, easiest, and most appreciated types of reward possible
- Recognize to create a reason for celebration

Recognition with good communication and planning will do more to build teamwork than any other action the coalition can take!

Examples:

Example 1: The coalition in Happytown celebrates by taking a picture of the committee (or group) responsible for an accomplishment, posts it in the coalition's "Recognition Book" (a scrapbook), and then submits an article for the local newspaper.

Example 2: The coalition in Greatcity has a "Happy Card." Every time something great happens, no matter how small, it is written on a "Happy Card." The cards are read and celebrated with a round of applause and recognition of the team. During times when results are a little slower than expected, the cards are taken out to remind everyone of all the past accomplishments.

Example 3: Photocity coalition takes group pictures of the coalition every six months and submits the photo to the newspaper with coalition accomplishments. Everyone loves seeing his or her picture in the paper!

Recognizing schools

Recognition of schools and their role in the initiative shouldn't be dependent on the amount of time spent within the school, which will vary with the size of the community and school district. It may take less time and fewer actions to incorporate a school health initiative into small school district than a larger district where communication can be more of a challenge. Planning for recognition will also vary with the situation!

Ideas for recognition to reward schools are listed below. It should be noted that many of these ideas could also be used in other sectors of the community. While the following list is not all-inclusive, it provides suggestions for making your school staff feel a part of the "big picture:"

Examples:

1. Plan for community newspaper articles or media coverage of school events and progress.

2. Present a **"Step Up and Step Out"** plaque to the school.

3. Frame a letter of appreciation from the coalition and present it to the school.

4. Recognize teachers or the food service director for special accomplishments in a newsletter, or some other media format.

5. Invite school administrators and board members to attend a "Thank You Day" at which they receive new, free resources from partners. Resources might include Food Guide Pyramid Sheets, new manual pages, cookbooks, or certificates to each teacher and food service staff member.

6. Initiate a "Get on the Band Wagon" event. Fill a wagon with objects such as healthy eating and activity pictures, artwork, or other classroom projects. If a wagon is not used, the display could be set up as a bulletin board.

7. Begin a **Step Up and Step Out** Baton. Pass a decorated relay from class to class as they participate in a project or create a new idea to support **Step Up and Step Out.**

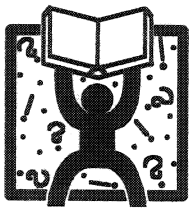
8. Set up special displays at open houses, parent/teacher conferences, and other events that identify current actions and completed projects. Involve students and teachers to develop and man the display.

9. Have students write essays about health, or their feelings about the initiative and how it has affected them, their families, and their school. Display the essays at school and print in school newsletters. Try to get the best essays printed in community publications.

10. Build teamwork between food service staff and students by inviting food service staff to help classrooms write a "class" menu. Give recognition to each class on the monthly menu calendar, and a pat-on-the-back to foodservice staff for extra effort!

11. Provide routine updates to include in packets for review at each school board meeting. As often as possible, involve students/teachers/food service director in brief presentations to the school board to make those reports come to life.

These examples not only provide reward...through recognition of participation...but also increase awareness of the coalition. Any type of recognition, program, or strategy that advances the plans of the coalition while allowing schools or other partners to be held up within the community, and beyond, as a bright, shining example of progress will be a "win/win" partnership.

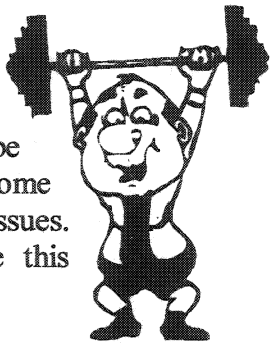


Build personal commitment

The previous actions for building teamwork were coalition "group" efforts. The influence of individuals on the collective nature of the coalition must also be considered.

When members/partners benefit personally or professionally from the actions of the coalition, they will be much more interested in being a part of the team.

Personal Choices



There are often misperceptions about healthy eating and activity, as well as an unhealthy focus on body size. That focus has caused people to go on "unhealthy diets," skip meals or "over-exercise." Making healthy eating and activity choices can be complicated. It is a very personal subject. Some people become irritated or uncomfortable when others start talking about these issues. The coalition may encounter community members who share this discomfort.

It will be difficult to build good teamwork if coalition members are unsure of their own feelings about healthy eating and activity. **Step Up and Step Out** becomes less intimidating when everyone is reminded the focus of the initiative is changing the environment to make healthy choices easier! At the same time, the coalition will be more effective if individuals understand their own feelings surrounding healthy choices. Regardless of personal feelings, nonjudgmental support for making healthy choices is important!"

Step 1: Identifying influences of attitude on the coalition

The first step in being able to provide support for the efforts of your coalition is recognizing the impact of personal choice on others. Individuals who make healthy eating and activity choices at coalition meetings demonstrate how others can do the same!

- There is more commitment for things in which you have a personal stake. Identifying your health beliefs, attitudes, values, and goals help in the development of the coalition's mission.
- Knowing what is important to you helps identify your area(s) of interest in coalition actions and increases motivation to create opportunities for healthy choices that benefit everyone.
- Recognizing factors that make it difficult for you and others to reach health goals makes it possible to find ways to overcome these problems.
- Recognizing the difficulties experienced by others fosters support rather than criticism.
- Creating your own opportunities to make healthy choices...demonstrating by doing...is the best way to teach children.

Examples:

Example 1: Arranging for coalition members to walk before or after a meeting, bringing healthy food choices to meetings or taking a stretch break during a meeting are ways to both demonstrate and motivate personal changes.

Example 2: Offering fresh fruits and veggies along with the chips at a luncheon meeting or juice and milk along with soft drinks provide healthy choices with little effort!

Step 2: Identifying influences on personal choice

The next step is to identify the things that influence your attitude. Many factors affect most of us nearly everyday, including:

- Family, friends, peers, co-workers
- Religious preferences
- Cultural values
- Age
- Stress in our lives
- Finances
- The ease of making healthy choices in our "world"

Recognizing factors in "your world" that shape your choices is the key for making healthy changes. Not having a choice often controls outcome. If you have ever eaten too much of something you really didn't enjoy because it was the only thing available, you know the frustration of not having choices.

Step Up and Step Out to consider influences!

A personal review worksheet, *Healthy Choices*, is found at the end of this module. It takes you through factors to consider when creating opportunities for healthy eating and physical activity choices for yourself and others in your community. As you are going through the worksheet, keep in mind the following suggestions for developing healthy eating and physical activity attitudes.

Healthy Eating Choices

- There are no "good foods or bad foods." All foods can fit for healthy eating!
- The best guide to use for healthy eating is the Food Guide Pyramid
- The Food Guide Pyramid teaches that we recognize:

Variety	Variety...in the foods we eat
Proportion	Proportion...in the number of servings we need each day from each food group of the Pyramid and how appropriate serving sizes look
Balance	Balance...food intake with variety, moderation and physical activity
Fat	Fat...to identify where the fats are
Choice	Choice...to recognize when we choose, all foods can fit if we choose appropriate serving sizes and have good balance with foods at the top of the Pyramid

See how your intake "stacks up" to the Food Guide Pyramid

1. Use the worksheet "How Does Your Pyramid Stack Up" found after the glossary at the end of this module.
2. Write down what you had to eat yesterday. Put each food in the appropriate food group of the Pyramid.
3. Estimate how many servings you had from each Food Guide Pyramid group.
4. Compare your intake with the recommendations provided on the Pyramid.

Healthy Activity Choices

Increasing activity is not hard when you realize "It's Everywhere You Go." (1)

- Activity should be something to be enjoyed rather than a "must do"
- Simple, daily life-style activities can be effective without too much effort
- Activities that don't require money or a lot of equipment may be easier to sustain
- Activity makes a great family time

How to make healthy changes

The *Healthy Choices* worksheet will help you identify personal habit "strengths" and areas for developing healthy habits. Two resources to help adults make changes are the "Personal Energy Plan" or "PEP" (2), a 12-week self-directed worksite demonstration intervention to promote healthy eating and moderate physical activity. If you decide to develop a plan for change, it will be good to keep these tips in mind:

- Increase your chance for success by making small changes that you can build on
- Keep a record of what you want to change
- Identify a means of determining success
- Get support from others when possible
- Reward yourself for success

Example:

Joe is a coalition member and teacher. He wants to improve his health and make some healthy changes he can model (demonstrate) for students. He completes the personal review worksheet, *Healthy Choices*, found at the end of this module to identify goals and develop a plan. An example of how Joe is using the personal review is provided below. Because he identified a way to measure healthy change, his chance for success is increased!

Joe's goals: **1. Eat a healthy breakfast**
2. Increase physical activity

Joe's plan to achieve his goal for eating breakfast:

1. Make a list of easy to fix breakfast ideas and post on refrigerator
2. Plan a grocery list
3. Get things ready the night before if needed

How Joe will measure his healthy change:

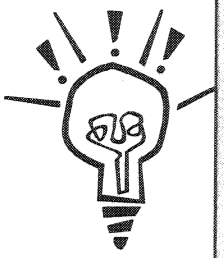
1. Make a note on the calendar each day breakfast is eaten and then check the number of days the goal was met at the end of the week!

Joe's plan for achieving his goal of increasing activity:

1. Combine physical activity with classroom lessons Monday, Wednesday, and Friday for 10 min. before lunch
2. Walk with other teachers after school 3 times a week

How Joe will measure his healthy change:

1. Note on the lesson plan the number of days that activity is added to the classroom
2. Place a checkmark on a personal calendar to track each day that walks are taken with other teachers



Module Tip:

Actions speak louder than words alone. A coalition that provides opportunities for team members to reach personal goals and then recognizes the team member strengthens teamwork. When schools are recognized as "stars" on the team, the game plan is underway for sustaining a successful health initiative.

FAQs:

- **Question:** How long does it take to develop good teamwork?
  Answer: It doesn't always happen overnight and depends very much on your community and relationships that already exist. When individuals recognize some of their health goals fit with the goals of the initiative, it is easier to facilitate. Clearly communicated and executed coalition actions along with individual recognition for efforts are also required.

- **Question:** What if the coalition can't find a "first string team", but many people that can give just a little?
  Answer: Many people, doing just a little can create many changes! Keeping many people in the loop prevents burnout that could happen with just a few and a devastating loss if 1 person leaves. It may be a little more of a challenge to develop strong teamwork with many people, but the same principles of communication, planning, and recognition apply.

Module Glossary:

Model: To practice in daily life the change you wish to create.
Personal review: A review of factors that influence personal choices for healthy eating and activity.

ZXCReferences and Resources

(1) ***Ready. Set. It's Everywhere You Go. CDC's Guide to Promoting Moderate Physical Activity.*** Division of Nutrition and Physical Activity, National Center for Chronic Disease Prevention and Health Promotion, Centers for Disease Control and Prevention, 4770 Buford Highway, Atlanta, GA 30341, 1-800-CDC-4NRG

(2) "Personal Energy Plan" or "PEP": Healthy Eating—Steps for Adding PEP to your Life; and Physical Activity—Steps for Adding PEP to Your Life. The Division of Nutrition and Physical Activity and the National Center for Chronic Disease Prevention and Health Promotion. PEP materials are available from CDC's partner, The Cooper Institute, The Division of Behavioral Science and Health Promotion, 12330 Preston Road, Dallas Texas 75230, bshp@cooperinst.org. Phone: 800-635-7050.

Worksheet for Team Building

Complete the following worksheet as a group to get a start on team building. Examples are provided.

1. **Identify the actions your coalition takes to ensure good communication**
   Example: A copy of meeting minutes is mailed to absent coalition members.

   Additional actions that could be planned:

2. **Identify ways to facilitate communication or other actions**
   Example: Form a committee to communicate community resources that would be available to school staff.

   Additional actions that could be planned:
   Example: Develop a committee that includes a school administrator, teacher, and community member to determine how to use community resources .

3. **Identify the steps your coalition takes to ensure recognition and support:**
   Example: The mayor awards certificates of recognition for community service to all coalition members year.

   Additional actions that could be planned:

Action!

Healthy Choices

Each coalition member should complete this worksheet individually.

Healthy Choices...are easier with healthy attitudes toward wellness. Check attitudes below you would like to develop.

- ❑ Healthy choices are more important for wellness than body size and appearance.
- ❑ Personal wellness goals can be made in small steps.
- ❑ All foods can fit in a healthy diet so there are no guilty eating feelings.
- ❑ Current eating and activity choices are neither good nor bad, just a starting place to set healthy goals.

Healthy Choices...can be influenced by several factors. Check the ones below that you would like to problem-solve to your benefit!

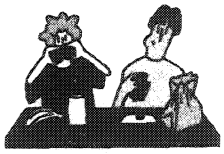
- ❑ **Social events** like movies, birthday parties, and eating out seem to make wellness difficult, *until* you learn all foods are okay with healthy portion sizes and balance with activity.
- ❑ **Family, friends, and co-workers** can "tempt" you with unhealthy choices, *until* you ask them to support your healthy eating and activity choices.
- ❑ **Time** can limit your choices when there is not enough of it, *until* you plan time for making healthy eating possible and make activity a routine.
- ❑ **Stress** can limit healthy choices, *until* you reduce it with stress reduction techniques such as listening to music, taking walks, or talking with a friend.
- ❑ **Income/costs** can be limiting, until you learn how to identify ways to fit choices in your budget.
- ❑ **Health problems** such as joint stress can be an excuse *until* you ask your doctor how to work within limitations.
- ❑ **Age** also becomes an excuse, *until* you learn how to set reasonable goals.

Health Changes...can be a success if you remember some important tips. Use the tips below when you create a healthy plan.

- ❑ Set small goals for a specific period of time.
- ❑ Change only a few things at once, 1 or 2 at a time are wise.
- ❑ Record the goals and dates you plan to meet them on a calendar.
- ❑ Check your progress weekly and reward your success with a healthy choice.

Consider the following healthy eating tips to include as goals for your plan.

- ❑ Eat a variety of food from each group of the Food Guide Pyramid.
- ❑ Eat portions recommended for each group of the Food Guide Pyramid.
- ❑ Eat fat and sugar less often or in smaller amounts, i.e., a candy bar once a week instead of every day.
- ❑ Balance food choices with physical activity.
- ❑ Plan easy to prepare, good tasting meals and grocery shop accordingly.



Consider the following physical activity tips to include as goals for your plan.

- ❑ Make small "life-style" changes like parking farther away in the parking lot.
- ❑ Increase activity at home like moving around the house during TV commercials.
- ❑ Increase recreational activity with things you really enjoy, i.e., softball vs. cycling.
- ❑ Find alternatives to fitness centers or equipment if they are not available, i.e., dancing, walking, or stretching.
- ❑ Reduce the things like TV viewing that limit activity.
- ❑ Set aside a particular time of the day for activity so it becomes a part of the routine.

Set your healthy goals, check your progress, celebrate your success, and problem-solve difficulties. An important reminder—keep it simple!

Week 1

What is planned?_____

What works?_____

What needs problem solving? _____

Week 2

What is planned?_____

What works?_____

What needs problem solving?_____

Week 3

What is planned?_____

What works?_____

What needs problem solving?_____