

# Community Engagement Through Coalitions Guide



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*Disclaimer: The views, opinions, and content expressed in this document do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).*

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# 1

## Introduction

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## INTRODUCTION

Community engagement and community-driven processes are uniquely critical to the work you do through ReCAST (Resiliency in Communities After Stress and Trauma). As a ReCAST grantee, you are already involving and empowering diverse stakeholders in a collaborative process to support the healing and wellbeing of your communities. The ReCAST Community Engagement Through Coalitions Guide is intended to add more tools to your toolbox for doing this work.

And, we know the work of shared leadership is hard, complex, and takes skill and time. In ReCAST grantees' Y1 annual reports, there were three main themes related to coalition challenges:

### 1) Building Coalitions

- Capacity Building
- Developing the mission and vision for the work
- Building trust among members and across partners

### 2) Recruitment

- Non-traditional partners
- Families and Youth
- Community stakeholders

### 3) Engagement

- Ensuring consistent attendance
- Mobilizing the coalition
- Clarifying member roles

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*“SAMHSA expects that ReCAST will be guided by a community coalition of residents and community-based non-profit organizations in partnerships with such entities as health and human services providers; schools; institutions of higher education; faith-based organizations; businesses, state and local government agencies; and employment, housing, and transportation service agencies.”*

- From the ReCAST FOA

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To that end, we have designed this guide to respond to as many of these complex challenges as possible, providing tips and strategies for supporting the community-driven component of ReCAST, with an emphasis on coalition development and leadership.

This guide also builds on a previous ReCAST resource, “[The Benefits of Partnering with Existing Coalitions Issue Brief](#) (July, 2017)” and the [ReCAST webinar on coalition building](#) (May, 2018). While the previous issue brief was about engaging existing coalitions (particularly Drug-Free Communities, or DFC), this new guide focuses on **creating, convening, and sustaining ReCAST community driven partnerships, namely through coalitions**. At the end of this guide, you’ll find a list of more resources for coalition development, from conceptualization to action.

You can read it through or jump to sections that are most helpful to you right now!

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# 2

## **Structure: Partners and Partnership Formations**

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## STRUCTURE: PARTNERS AND PARTNERSHIP FORMATIONS

There are many ways to structure your partnership body to actualize a project rooted and informed by community engagement. Considering the purpose of your group and who should be at the table (or as B-CIITY's W. Baltimore's project director has noted, who *is* the table) can help you determine what your partnership should look like.

### 2.A. Community Engagement Possibilities: Advisory Bodies, Governing Bodies, and Coalitions

Community engagement bodies can form organically, based on shared goals; however, to fully integrate community voice and decision-making, you will likely need to use a more formal group structure.

Reflect on what you hope this group will bring to your ReCAST program and community.

- **Focused on long term project sustainability? You may want to consider forming *consortia and alliances***, semi-official membership organizations. They typically have broad policy-oriented goals and may span large geographic areas. They usually consist of organizations and coalitions rather than individuals.
- **Focused on communications and outreach? You may want to consider joining *strategic networks***, loose-knit groups formed primarily for the purpose of resource and information sharing. For example, in Year 1 of ReCAST Baton Rouge's coalition formation, members voiced a desire to share the work they are doing in their home organizations, and then moved into sharing what work they are doing that contributes to the overarching goals of ReCAST. This way, the members gained information and resources to help their own work while participating in the project's larger shared outcomes.
- **Focused on achieving a specific goal? You may want to form a *task force*** to come together to accomplish a specific series of activities, often at the request of an overseeing body. Your coalition may be formed, and your community might experience a critical incident that might benefit from forming a task force to address and lead ReCAST's role in responding to and recovering from the critical incident (note: please see the NITT TA Center's "*Preparing for a Verdict*" tip sheet for more information on community engagement and critical incident work).<sup>1</sup>

In addition to the above, there are three main types of community engagement formation approaches you can take in your ReCAST design: Community Advisory Board, a Governing Board, and a Coalition. Note that at the time of publication, most ReCAST grantees have chosen to employ an Advisory Board or a Coalition as their community engagements strategy.



<sup>1</sup> Giachello, A.L. (author); Ashton, D., Kyler, P., Rodriguez, E.S., Shanker, R., Umemoto, A., eds. (2007). Making Community Partnerships Work: A Toolkit. White Plains, NY: March of Dimes Foundation. <http://www.aapcho.org/wp/wp-content/uploads/2012/02/Giachello-MakingCommunityPartnershipsWorkToolkit.pdf>

## Types of Community Engagement Groups

	<b>Community Advisory Board/Committee/Council</b>	<b>Governing Board</b>	<b>Coalition (Sometimes also called a Working Board)</b>
<b>Outcome</b>	Advice, perspective, and expertise	Governance, including fiscal, programmatic, and administrative leadership	Organizations made up of various organizations working together for a common purpose.
<b>Why this kind of CE?</b>	You need a sounding board. An advisory board can provide expertise, guidance, and project-development insight  Advisory Committees respond to organizations or programs by providing suggestions and technical assistance	You need an external body concerned with implementation of strategy, plans, policies, and priorities	You want to work with agencies with greater expertise or complementary knowledge and skills; You want opportunities to share resources and reduce the number of competing services; you want to engage partners in owning and implementing the work.
<b>Process</b>	Inform important decisions and directions for the institution through meaningful discussions help the institution achieve its vision by building new partnerships and relationships	Shift from doing administrative work to oversight of finance and administration, and from doing program work to overseeing program work <sup>2</sup>	Gain credibility from their association with other stakeholders  Chance to increase and improve community resources and services <sup>3</sup>
<b>People/ Members</b>	Members have social and political capital (e.g. they may be a part of the grant application writing process) and have broad spheres of influence  Usually comprised of 1) those who will be meaningfully affected (e.g., city staff or residents), and 2) those with expertise in the matter (e.g., subject matter experts, ReCAST partners, members with lived experience)	Typically have a chair who works concertedly with the agency; board members may be informal or formal leaders.	Members value working with multiple groups to increase influence and negotiating power with other public and private groups  Usually comprised of 1) those who will be meaningfully affected (e.g., city staff or residents), and 2) those with expertise in the matter (e.g., subject matter experts, ReCAST partners, members with lived experience)
<b>Structure</b>	Meetings should be infrequent (once or twice a year) and meet for a day to a day-and-a-half to allow for a deep dive into key issues <sup>4</sup>  Agendas: <ul style="list-style-type: none"> <li>• Provide the members with information and knowledge they don't already have</li> <li>• Dedicated time for your institution to communicate your current efforts in the area that is being discussed</li> </ul> Each advisory board meeting should have multiple times in which you are asking for advice, feedback, and counsel from the members	In contrast to advisory boards, governing boards have decision-making authority.  Their focus is on keeping the project on-mission and aligned with strategic priorities.  The governing board should have an effective relationship with project leadership, the advisory board, and members of the community <sup>5</sup>	Coalitions can be short-term or long-term. <sup>5</sup> <ul style="list-style-type: none"> <li>• A short-term coalition is usually formed to address clear-cut issues requiring immediate action, and ends when its goals are achieved</li> <li>• Long-term or permanent coalitions are more likely to have goals and objectives, formal organizational structures (e.g., executive committee), written rules and regulations (e.g., bylaws), and staff. They may also involve delivering services</li> </ul> Like governing boards, Coalitions have decision-making authority.

<sup>2</sup> CompassPoint Nonprofit Services. (January 17, 2008.) Working Board vs. Governing Board? *Board Café*.

<https://www.compasspoint.org/board-cafe/working-board-vs-governing-board>

<sup>3</sup> Berkowitz & Wolff, 2000, p. 2 in Giachello AL, author; Ashton D, Kyler P, Rodriguez ES, Shanker R, Umamoto A, eds. 2007. Making Community Partnerships Work: A Toolkit. White Plains, NY: March of Dimes Foundation.

<sup>4</sup> Engaging Advisory Boards. (September 2014). Bulletin on Advancement. Gonser Gerber Advancement Consultants.

<http://www.gonsergerber.com/>

<sup>5</sup> Board Responsibilities. Association of Governing Boards of Universities and Colleges. <https://www.agb.org/briefs/board-responsibilities>

**Oakland and Minneapolis ReCAST have formed advisory bodies.** Oakland ReCAST formed a Resilience Working Group (RWG), a group mainly comprised of systems leaders (e.g. representatives from the mayor’s office, Alameda County, Oakland Unified School District, Trauma Transformed) who meet quarterly to hear the progress and status of ReCAST from the program management and leadership, and to provide critical advice regarding the direction of the project. For example, the RWG was a critical actor and advisor in the project’s CNRA and strategic planning process. Minneapolis ReCAST set up an advisory board that provides feedback to the city’s ReCAST team; the city has divided management of the advisory board by their regional foci (Northside and Southside). Like Oakland, the advisory group provides feedback and suggestions to the project’s goals, including SAMHSA deliverables like the strategic plan.

**W. Baltimore and Milwaukee ReCAST have formed coalitions.** W. Baltimore (officially called B-CIITY) B-CIITY has a coalition and governing board that is an umbrella entity that includes ReCAST. Community members (including youth leaders) design and direct the movement of the coalition and the project’s work; the Health Department is a member of the coalition. Milwaukee ReCAST shifted from an advisory body in Year 1 to developing a coalition in Year 2 of their project. The coalition includes families and residents from priority neighborhoods, existing Milwaukee area networks that focus on mental and behavioral health, and institutional and community partners. Milwaukee ReCAST Coalition members develop and make recommendations on community healing activities; identify specific policies and practices that will accelerate change; and clarify goals and context related to sustaining policy efforts. Resident leaders report to the coalition which provides relevant, authentic, and useful ways to lead the coalition or direct its work.

## 2.B. Partnership Considerations: Decide Your Approach to Community Engagement<sup>6</sup>

Once you’ve determined the general structure and role for your group, it’s helpful to take a step back and consider your approach to integrating community members.

### Purpose and Values

The following are **key questions** to map out in the design of your coalition. Note: even the design of the community engagement body can be informed by community and city partners.

- 1) What’s the body’s purpose? For whom? By whom?
- 2) What are the shared norms? What working agreements will members commit to in order to maintain confidentiality, communication, collaboration, creativity, and healthy partnerships?
  - How will members be held accountable to these norms?

#### *Milwaukee’s Coalition Guiding Principles*

- **Community.** ReCAST MKE is driven by **youth and families most impacted by violence**. Its success is dependent on the power, connection, and engagement of every resident in making Milwaukee one of the safest cities in the country.
- **Equity.** Although violence affects the entire community, ReCAST MKE recognizes the **inequitable toll that violence takes on specific neighborhoods and populations** including youth, women, and people of color. We recognize that multiple forms of oppression contribute to violence and trauma and must be acknowledged, addressed and dismantled, including institutional racism.
- **Individual and Community Resilience.** ReCAST MKE acknowledges the impact that violence and trauma have on children, families, and neighborhoods and promotes **asset-based solutions** for immediate and lasting change
- **Action.** ReCAST is **rooted in a public health approach** to preventing multiple forms of violence building on Milwaukee’s assets through coordinated strategies that are comprehensive, actionable, and measurable.

These guiding principles serve as working agreements for how the coalition engages with each other, community, and partners.

<sup>6</sup> Center for the Application of Prevention Technologies. (March 2, 2017). Components of an Effective Coalition. Substance Abuse and Mental Health Services Administration. <https://www.samhsa.gov/capt/tools-learning-resources/components-effective-coalition>

- Who will provide hard (extending, so what?), cool (analyzing, probing), and warm (recognizing, highlighting) feedback?<sup>7</sup>
- 3) How are agreements about expectations, roles, and responsibilities codified? See Appendix C for a sample member agreement.
  - 4) How will members feel valued?
  - 5) What is the difference between what the board/body does as a collective and what members of the board/body do as individuals?

### Community and Representation

Representatives and members might be comprised of a combination of the following types of key stakeholders<sup>7</sup>:

- people who have experienced the problem – the focus audience
- people who want to solve the problem
- people who have the resources to solve the problem
- people who may benefit from the solution
- people who may benefit from the problem

Central ReCAST questions that many grantees importantly grapple with are:

- 1) Who represents the community?
- 2) Which individuals, agencies, or organizations have influence in the community, and what is their sphere of influence?
- 3) Are key members community residents or do the key members work for community-based organizations?
- 4) Whom does the individual or community-based organization represent or report to?
- 5) Who has the time, resources, and flexibility to attend partnership meetings and take responsibility for action items?
- 6) Who is defined as “outside” the community and should not be invited to participate?<sup>7</sup>

**Trauma Informed Los Angeles’ Steering Committee** rotates leadership every six months in order for new voices to ensure diverse participation.

Each new Steering Committee member commits to upholding established values (see: <https://traumainformedla.org/who-we-are/our-core-principles/>), meeting quarterly, and fulfilling their duties.

TILA’s Steering Committee roles include:

- Two Co-Chairs
- Training and Resource Liaison
- Operations Coordinator
- Development Coordinator
- Outreach and Networking Coordinator
- Program and Events Coordinator
- Communications Coordinator
- And Core Members

Each new steering committee member is assigned a buddy steering committee member who is a veteran, providing the new member orientation, acclamation, and a personalized welcome and support to the committee’s culture and work.

The Steering Committee has an annual retreat with new members to orient them to the mission, vision, culture, and principles of the work, including a technology introduction to Basecamp and a welcome packet with key information. This way, each member feels valued, informed, and competent to fulfill their role’s responsibilities.

### Equity vs Equality

The values and principles of the advisory group or coalition should be embodied in how the group works together and with the city, county, and community. This includes the hard work of

<sup>7</sup> School Reform Initiative. Feedback Providing During Protocols. [http://schoolreforminitiative.org/doc/warm\\_cool\\_hard.pdf](http://schoolreforminitiative.org/doc/warm_cool_hard.pdf)

ensuring members' power access. The National League for Nursing provides important guidance for how to tend to equitable versus equal power dynamics within the community engagement group, using coalitions as an example. In coalitions, the League notes, "it is **equity** within a group's value system that is sought, not **equal** power. Equity has more to do with each member having some form of power, such as connections, expertise, resources, position, charisma, integrity, and time. Each group member can contribute in a different way at varying levels and at various times. All forms of power must be acknowledged and equally valued to maintain equity.<sup>8</sup>

*What might members establish in the structure, membership, principles and values that ensures equitable power participation?*

### **Utilizing Gifts and Amplifying Each Partner and the Collective Coalition's Contribution Value**

Engagement is secured when members and the collective group feel a sense of purpose, value, competency, and contribution.

***Is your coalition situated within the broader ecosystem in a way that enables the coalition to make valuable and unique contributions?*** It's vital to ensure ReCAST's community engagement body's value add. If there are already existing coalitions with which you might partner (and see further for ReCAST examples), you may consider establishing an advisory body for ReCAST's specific work so that the community's engagement opportunities and efforts aren't duplicated and instead are maximized.

#### **Community Member Roles**

- Stakeholders are those individuals or groups affected by the issue. A gatekeeper or key partner might also be a stakeholder.
- Gatekeepers are individuals who know the community, its issues, and its players. They may also be leaders themselves and often influence community issues. Gatekeepers usually work in the community and are well-known and respected among community members and leaders.
- Key resident-partners have spent enough time in the community to have gained special knowledge about the community. They can be "thoughtful observers and informal historians" that can articulate important issues of culture, key groups and relationships, and perceived barriers. They at times may help facilitate health promotion efforts.<sup>9</sup>

***Is every member of the coalition in a position to contribute from their greatest strength?*** Sample skills to assess and then leverage for your community engagement body include: organizing the meetings (administrative tasks), liaising with other community entities, providing expertise on an issue or subject, fundraising, graphic design, advocacy, facilitation, writing/recording, membership and relational cultivation.

Addressing the questions helps to ensure membership, ownership, and the community engagement body's sustainability.

(And remember: unless it is the culture you have established, not every member needs to be involved in every decision and/or task - that often contributes to burn out!).

<sup>8</sup> National League for Nursing. Coalition Building. Page 3. <http://www.nln.org/docs/default-source/advocacy-public-policy/coalition-building-pdf.pdf?sfvrsn=0>

<sup>9</sup> ReCAST Grantee Manual: Resiliency in Communities after Stress and Trauma. (September 22, 2017). Mental Health Promotion Branch, Division of Prevention, Traumatic Stress, and Special Programs, Center for Mental Health Services, SAMHSA.

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# 3

## **Coalition Culture, Principles, and Decision Making**

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## COALITION CULTURE, PRINCIPLES, AND DECISION MAKING

Creating a shared culture and expectations for decision-making will help ensure alignment between your ReCAST program and the roles and activities of your community engagement body. This section provides ideas, reflection questions, and sample processes to help your coalition embrace and embody your ReCAST mission and vision.

### 3.A. Culture Setting: Establish Founding Principles

Establishing principles for your coalition will help keep you focused on the change you are trying to achieve. These principles also serve as reference points for new members. The following sample principles have been adapted from the “ReCAST Resilience Framework,<sup>9</sup> and can be adapted by ReCAST communities. Each principle includes sample ways in which it may be relevant to ReCAST coalition efforts.



- **Trustworthiness and Transparency.** Trust requires transparency in decision making. The success of ReCAST, and the project’s ability to support trauma-informed services, relies on trust being built between the community and providers and everyone involved in ReCAST. *Examples: coalition has a transparent decision-making process; coalition provides a conduit of information between ReCAST lead agencies and communities. For example, Milwaukee and St Louis ReCAST teams use Basecamp as a way to ensure transparent communication and decision making. See Appendix B for options for online platforms like Basecamp.*
- **Collaboration and Mutuality.** Although each ReCAST partner has a unique role to play in a trauma-informed approach, the organizations and individuals partnering for ReCAST must view each other as necessary, share power, and engage in shared decision making. *Example: Trauma Informed Los Angeles uses Participatory Decision Making (PDM) as a collective decision making approach.<sup>10</sup>*
- **Empowerment, Choice, and Voice.** ReCAST’s trauma-informed approach builds on the strengths of individuals, community members, and providers. Everyone’s voice is heard and choices are respected. This approach is reflected at every level of the project from leadership to service provider. Diverse perspectives and ideas are respected; coalition feels heard by the city/county and is empowered to make decisions. For example, *B-CIITY invested the first two years of the grant in establishing voice and choice culture agreements and structures in the coalition so that the coalition eventually became owned by community members. This is a way to model shared leadership.*
- **Cultural, Historical, and Gender Issues.** ReCAST brings an equity lens to address stereotypes and biases. Strategies recognize the impact of race-based and historical trauma and employ cultural practices to promote healing. Members represent the cultural, racial, and ethnic diversity of the communities served; coalition commits to advancing social justice and equitable access to services. For example, Baton Rouge’s community, city, and agency partners were invited to their first ReCAST Orientation as a way to learn more about the opportunity to participate in the coalition. A central part

<sup>9</sup> ReCAST Grantee Manual: Resiliency in Communities after Stress and Trauma. (September 22, 2017). Mental Health Promotion Branch, Division of Prevention, Traumatic Stress, and Special Programs, Center for Mental Health Services, SAMHSA.

<sup>10</sup> See Kaner, Sam; Lind, Lenny; Toldi, Catherine; Fisk, Sarah; Berger, Duane; Doyle, Michael. (2007). Facilitator’s Guide to Participatory Decision-Making. Hoboken, NJ: Jossey-Bass.

of the orientation included a learning session on structural violence and historic oppression in order to ground the potential and future members in the Why of ReCAST Baton Rouge so that members aligned their language around trauma and resilience, planting seeds for future collaborative work.



- **Safety.** Safety is a priority of a trauma-informed approach. Every aspect of ReCAST must be mindful of safety for youth, families, community members, providers, and other stakeholders. Coalition meetings provide a safe space for discussing community experiences of trauma; coalition meetings are held at a time and place that is accessible to community members. Ways to ensure safety is to establish working agreements, greet all members upon entry of the meeting, and engage in community building activities at every meeting to build relational trust between members.
- **Peer Support.** ReCAST peers are those individuals with lived experiences of trauma. This may also include family members of children who have experienced traumatic events and are key caregivers in their recovery. ReCAST peer support activities promote a sense of belonging within the community and support the development of self-efficacy. Youth, families and caregivers, and behavioral health service consumers are valued for their perspectives and lived experience expertise.

Importantly, ReCAST community engagement bodies are often comprised of people who professionally and personally are impacted by the catalytic event and the ongoing aftermath from the event: it is a frequent experience for these bodies to be impacted by episodic and chronic violence, the violence the body is formed to address. This puts members in unique potential to experience *vicarious or secondary trauma*.

The Sexual Assault Coalition's Resource Sharing Project conducted a survey of coalitions about exposure to and experience of vicarious trauma. From survey data from 46 coalition members on how vicarious trauma affects them, the data surfaced unique support needs for coalition members' in the organizational culture, work environment, and leadership.<sup>11</sup> By directly naming and addressing the potential and eventual impact of their coalition members' work on an issue that exposes them to stress, pain, harm, and trauma, the Sexual Assault Coalition established specific strategies to support their Coalition members' self and collective care towards embodying vicarious resilience. This practice is one strongly recommended for ReCAST community engagement leadership considerations.

### 3.B. Decision Making, Advice, and Team Formations

Form follows function. Once you have collectively agreed on what your community engagement body will be, you can then think about how decision making will happen between you (the ReCAST grantee), your coalition or advisory body, and other partners.

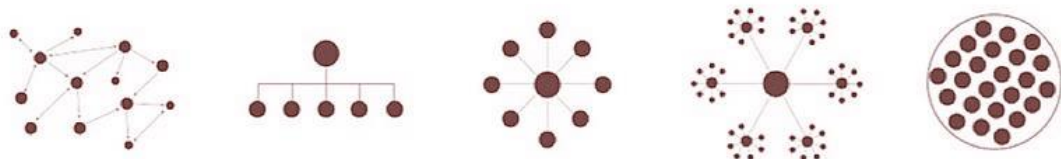
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<sup>11</sup> See the full guiding paper here:  
[http://www.resourcesharingproject.org/sites/resourcesharingproject.org/files/Vicarious\\_Trauma\\_andthe\\_Coalition\\_0.pdf](http://www.resourcesharingproject.org/sites/resourcesharingproject.org/files/Vicarious_Trauma_andthe_Coalition_0.pdf)

*Decision-making is a central and often underexplored cultural cornerstone to how groups can become teams, leading to real impactful work, and the formation of your ReCAST community engagement body is determined by the intentional design decision-making culture.*

Consider the table below.<sup>12</sup> While originally conceptualized to describe social media communication patterns, this can be very helpful when applied to ReCAST. For example, are you a dandelion: grantee is the center of the work, with task forces—strategic planning, youth engagement, trauma-informed trainings—as the smaller teams? Or are you centralized: meaning that without the county or city ReCAST grantee, coalition members are limited in their ReCAST activity decision-making?

**What formation best serves your leadership style? The needs of your community? The efficiency of the grant?**

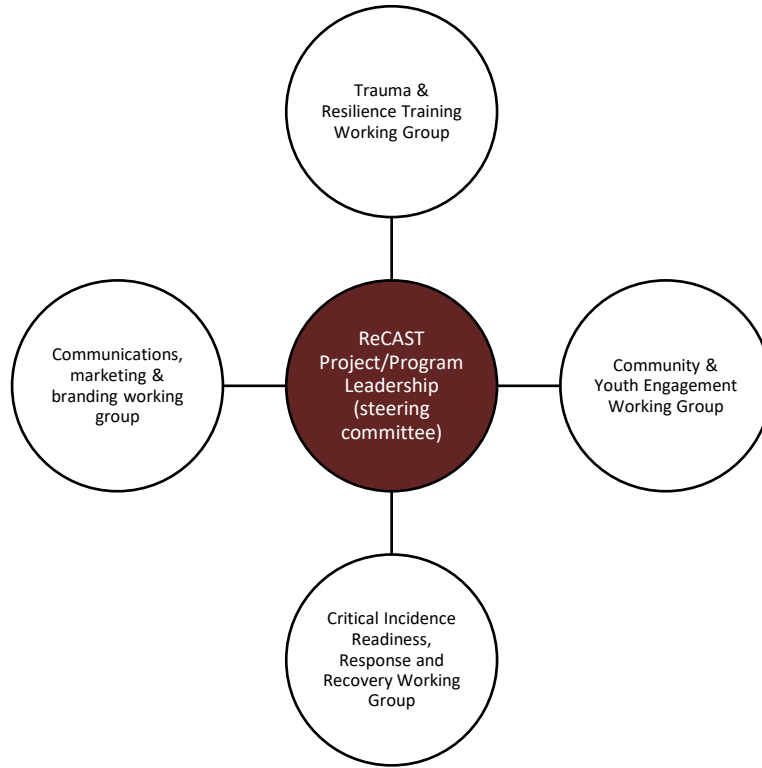


	<b>Decentralized Group</b>	<b>Centralized Group</b>	<b>Coordinated Team</b>	<b>Hub and Spoke "Dandelion" Teams</b>	<b>Holistic "Honeycomb" Bounded Team</b>
<b>Description</b>	No one person manages or coordinates	One individual or small group (e.g., executive committee) manages all activities and decisions (this might be a ReCAST project manager or community members who serve as a Steering Committee)	Cross-functional team	Individual advisory groups or coalitions have decision-making power within the larger advisory group/coalition	Everyone is involved in all decisions and actions
<b>Plus</b>	Efforts and areas of focus emerge organically from various members of the group	Creates consistency	There are centralized positions/decision makers and all stakeholders feel united in shared mission and vision	All dandelions have shared agreements about roles, responsibilities, and outcomes of their formation	Entire group is tapped for expertise (e.g., providing trainings)
<b>Challenge</b>	Can hinder communication, decision-making; can result in inconsistency	Other individuals and group members may not feel heard; coalition may miss important issues	Can be more resource-intensive (e.g., may need to hire coordinator)	Formations can change based on needs; Requires strong communication and transparency	Structure must emerge organically; time intensive and can hinder decision making processes

<sup>12</sup> Owyang, J. (April 15, 2010). Framework and Matrix: The Five Ways Companies Organize for Social Business. <http://www.web-strategist.com/blog/2010/04/15/framework-and-matrix-the-five-ways-companies-organize-for-social-business/>

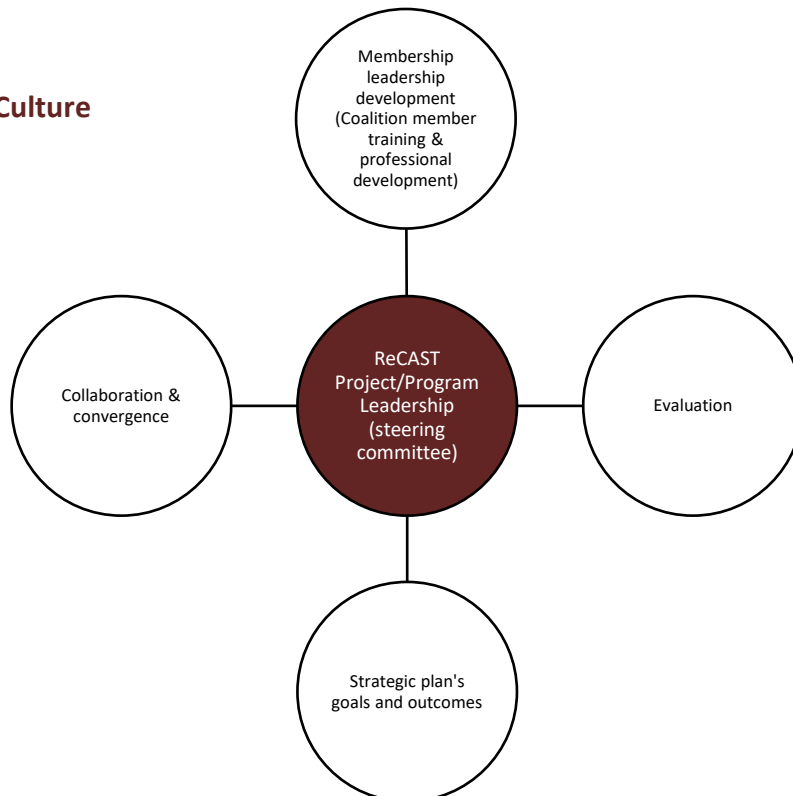
An example of using the “coordinated team” model for your ReCAST work might look like one of the following:

**By Task**



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**By Coalition Culture**



**St Louis ReCAST established two formations to meet the project’s two distinct needs:**

**1) Core Advisory Board**

The Core Advisory Board (CAB), consisting of partners from twelve organizations that help make key decisions, progressing the projects forward. The CAB has been instrumental in helping facilitate group meetings with community delegates, branding, helping define the funding priorities, and designing the community voting process.

**2) Coalition of Stakeholders Members**

The Coalition of Stakeholders (COS) is another group formed. It is comprised of 25 committed community organizations, but its distribution list contains 115 organizations. The COS purpose is currently being defined, but will increase partnerships and collaborations of organizations working in the same space.

***What formations already exist with whom your ReCAST project might partner?***

In Year 3, St Louis will be exploring a third engagement body by partnering with an existing coalition youth advisory board to access youth and family voice.

***Have existing access to an already-established coalition?*** Dallas ReCAST leveraged a partner, the Dallas-Fort Worth Hospital Community Foundation, to recruit advisory members. As the team engaged in the CNRA and strategic planning process, the advisory members from the DFWHCF provided insight, data, and guidance for each deliverable.

Chicago ReCAST’s advisory committee and subcommittees are a part of Healthy Chicago 2.0, an initiative of the Chicago Public Health Department. In this formation, ReCAST’s community engagement bodies are the spokes and a parent initiative is the hub.

**Collective Decision Making**

Here’s what we know about collective decision making:

Individuals must be part of teams to propose decision-making processes; when decisions happen outside the collective, it will challenge trustworthiness, transparency and consensus.

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***Decision making can only happen if there is trust, unified vision, and agreed terms or norms.***

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For example, Milwaukee Coalition members were offered decision making and input opportunities in each process step of the values, principles, mission and vision construction work:

- Mission Statement: A group of ReCAST partners talked about and developed a mission statement for ReCAST on 1/9/18. A Basecamp “pitch” of the two statements for partners to choose from was posted on 1/24/18. Final selection was made on 2/11/18.
- Vision statement: This was developed with the Violence Prevention Steering Committee and community members. It was presented at several community briefings and listening sessions, where residents had the opportunity to respond to it.
- Partner Agreements: Partners had two opportunities to suggest, discuss and agree upon norms (November 2017, January 2018)
- Evaluation values: The partner evaluation team drafted a set of value and principle statements after informal conversations with ReCAST Program Partners. Each partner, along with Office of Violence Prevention (OVP) staff, was sent a survey to provide feedback on the value/principle statements.

As aforementioned, Trauma Informed Los Angeles adopted *Participatory Decision Making (PDM)* which allows Steering Committee members to have a range of input beyond “agree” and “disagree” and helps move a decision point to action.

Not all decisions need to be made collectively but all decisions’ process should be established with members transparently (unless the community has adopted a the holistic honeybomb structure, in which case all decisions are collectively bound).

## Trauma Informed LA Gradients of Agreement

How much do we support this \* \_\_\_\_\_ ?

<b>ENDORSE</b>	<b>AGREE</b>	<b>SUPPORT</b>	<b>ABSTAIN</b>	<b>STAND ASIDE</b>	<b>DISLIKE</b>	<b>DISAGREE</b>	<b>VETO</b>
Whole-hearted endorsement	Agreement with a minor point of contention	Support with hesitation/reservations	No opinion	More discussion needed	Don't like, but will support the majority	Serious disagreement and don't want to help implement	Can't go forward
<i>"I like (or really like) it."</i>	<i>"Not perfect, but I basically like it."</i>	<i>"I can live with it."</i>	<i>"I have no opinion."</i>	<i>"I don't understand the issues well enough yet, but I don't want to hold up the group."</i>	<i>"I want my disagreement recorded, but I'll support the decision."</i>	<i>"I won't stop anyone else, but I'm not on board and don't want to make this happen."</i>	<i>"I do not support, and we have to continue working."</i>

\*e.g. recommendation/proposal/policy/decision/etc.

Adapted for Trauma Informed LA from Gradients of Agreement Scale © 2014, Community At Work and Gradients of agreement revision © John Ott & Rose Pinard, Center for Collective Wisdom

### 3.C. Advice Process<sup>13</sup>

Advising is another element of community engagement that is often underexplored, and as aforementioned, many ReCAST grantees have selected an advisory body as a community engagement body for advice. As such, It’s important to reflect on when, why, and how to effectively solicit their advice.

**Consider the Situation:** “My team is noticing a problem/opportunity that might require a decision. Should we use the advice process?” Ask the following questions:

- Does this problem or opportunity require one and only one decision? Would this decision be more successful with buy-in and trust across teams?
- Could this problem/opportunity lead to a violation of our ReCAST project’s mission, vision, and agreed outcomes?
- In what team(s) should this decision be located? Is this team the right one? Which team is most closely linked to the decision – or which team with the most energy, skill, and experience to make it?
- Who will be meaningfully affected by this decision?

<sup>13</sup> Adapted in part from “Decision Making.” Reinventing Organizations Wiki. [http://www.reinventingorganizationswiki.com/Decision\\_Making](http://www.reinventingorganizationswiki.com/Decision_Making)

All of the questions above require thought and discernment – there is no one-size-fits-all answer. If appropriate, start to conduct the advice process!

**Identify Advice Givers: “Who can support us? Who can give us advice?”**

The relevant team identifies representatives of the following two groups necessary for the advice process: ***those who would be affected by the decision and those with expertise in the subject matter.***

The bigger the decision, the wider the net has to be cast and the longer the timeframe should be. This process takes time – when you use this process to make big decisions, you will need to assess whether the decision is time-sensitive and plan ahead accordingly. There will be times when an extensive advice process is at odds with a desire for urgency and immediacy. In these moments, consider whether that urgency is truly warranted in the circumstance, and if it is, perhaps reconsider the use of this process.

**Ask for Advice: “Can you give me your advice?”**

- In the event of bigger decisions, it is recommended that all advice is properly documented so that it is easily accessible to anyone.
- There are many formats and mechanisms to ask people for their advice! You could have one-on-one conversations with individuals, send out a survey or poll electronically, or hold videoconferencing calls (e.g., via Zoom) or in-person feedback sessions.
- What you ask matters – be thoughtful about how you frame the advice you're seeking, what question or perspective you would like people to consider. Be clear about what is within the scope of the problem/opportunity you're seeking to address. If your team has already done significant thinking on the matter, share that thinking.

Oakland ReCAST’s advisory body, the Resilience Working Group, gathered together to thoughtfully support ReCAST program leaders and managers’ strategic approach to the topic of critical incidence readiness, response and recovery.

The first session occurred during Year 2, asking for advice, engaging in study and inquiry around the possibilities for the work (learning from peer grantees Minneapolis and St Louis).

Select RWG members will work with the program team to draft an approach (informed by the experience of the community and city’s response to the murder of Nia Wilson) and report back to the RWG for consensus.

**Make the Decision: “Now that we have gathered all of the information and advice we need, let’s make a decision using a process that our team agrees to”** (usually through informal consensus/relationship).

- It is important to remember that this process is about accessing and utilizing collective wisdom to make good decisions. Your final decision should weigh all the wisdom you received, but you do not need to incorporate ALL facets of the advice gathered – this process is not about consensus or compromise.

**Report Back: “It’s time to let everyone whom we’ve involved in the advice process know what, why, and how we’ve come to this decision and whom to reach out to with thoughts.”**

- Consider this step carefully and plan for transparency and boundaries with decision agreements.
- This step can happen in person, via conference call, or in writing; the most essential information is clarity on the “why” of the decision (what need is it meeting) and the “how” of the decision (how it came to be).
- In the report back, be clear about what outcome with which you are arriving to the advisory group: Are you asking for consensus? Has the decision already been made and you are reporting back the agreement? If there is room for feedback, be clear what is negotiable and what is not (and why).

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# 4

## **Step-by-Step Guide: Creating a ReCAST Community Engagement Body**

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## STEP-BY-STEP GUIDE: CREATING A RECAST COMMUNITY ENGAGEMENT BODY

Your ReCAST coalition may be still in the early stages of development, already functioning and adding new partnerships, or fully developed and ready to take on new challenges. ***This checklist provides steps for the operation and functioning of your coalition.*** If your coalition is well-established, you can use this checklist to reflect on further ways to grow and enhance your community engagement activities.



- Step 1: Identify an issue that requires capacity, resources, and expertise beyond the scope of a single individual and/or organization.**
  - For ReCAST, these issues have been clearly and thoroughly identified through the strategy plan and ongoing work plans.
  
- Step 2: Develop a list of partners that you know and trust.**
  - Partners you have already worked with
  - Partners recommended by others
  - Valuable partners outside your circle of interaction
  
- Step 3: Check in about capacity and interest.**
  - Have a conversation with each partner about their interest and experience in working within a coalition.
  - Find out who from the organization would be the best fit.
  
- Step 4: Decide who is the best facilitator (see Appendix A for Facilitator Tips).**
  - If you are the main convener, then it would make sense to facilitate the first meeting. However, very soon after, there should be a collective conversation about what each participating organization needs and wants from the facilitating body.
  
- Step 5: Make the formal invitation to first meeting.**
  - Draft an invitation with the location, dates, and overview of the issue you are working to address.
  
- Step 6: Have the first meeting.**
  - Design the agenda (see Appendix A for guidance). Engage multiple viewpoints and participants if possible.
  - Ensure accessibility, taking into account the needs of community stakeholders.
  - Give most of the time for building trust and relationships.
  - Get participants intentions, questions, concerns, and hopes.
  - Set next two dates for meetings.
  
- Step 7: Hold a follow-up meeting with either the whole coalition or a smaller leadership hub.**
  - Conduct a landscape analysis to assess how members are currently addressing connected issues.
  - Send out notes or post them on your online communication platform.
  - Receive recommendations on additional participants.

- ❑ **Step 8: Prioritize foundational pieces.**
  - Solidify your membership and add new organizations if needed.
  - Conduct an environmental scan of other related initiatives or possible existing coalitions.
  - Create a roster for each participant organization.
  - Develop a drafted list of principles that all members embrace.
  - Create a central mission for the coalition.
  - Draft a press release to send out once the principles are completed.
  - Develop a conflict-response protocol for when there is disagreement or internal tension.
  - Create a decision-making structure that works for the participants.
  
- ❑ **Step 9: Review and finalize pieces at next meeting.**
  - Make decisions on all foundational pieces with the approval of the coalition, given your decision-making process.
  
- ❑ **Step 10: Celebrate!**
  - Set up an event or gathering outside of the formal space of the coalition meetings to invite participating organizations and their staff/members to interact and appreciate the accomplishment.
  - Send out press release.
  - Ensure people know each other's names.
  
- ❑ **Step 11: Orient action plan around the foundational documents.**
  - Begin to outline possible opportunities to address the issue based on the requirements of the funder, needs of the community (potentially captured in the Community Needs and Resources Assessment) and collective input.
  - Agree on a central strategy.
  
- ❑ **Step 12: Break up into sub-groups with expertise/interest (e.g., Coordinated or Hub and Spoke Formation).**
  - With the central strategy in place, each organization can select an aspect of the work to help support in smaller groups. These are related to programmatic developments or different strategies (e.g., events, publications, research, advocacy).
  - Create a set of core sub-groups whose responsibility is to sustain the coalition itself (e.g., finance, governance, recruitment, communication)
  
- ❑ **Step 13: Plan your course of action.**
  - Plan out how you will implement the action plan of your coalition; this may be aligned to the strategic planning process.
  
- ❑ **Step 14: Execute your plan of action.**
  - Prepare for launch or day of action.
  - Ensure there is shared understanding or agreement about activities and roles.
  - Engage in action (e.g., training, city event).
  
- ❑ **Step 15: Debrief and evaluate.**
  - Schedule a meeting to debrief the action; bring in written and anonymous feedback prior to the meeting, if possible.
  - Look at the process, the impact, the action, and the experience throughout the duration.

- ❑ **Step 16: Celebrate!**
  - Regardless of the outcome, there should be a celebration of all the effort that went into the action.
- ❑ **Step 17: Integrate learning.**
  - From the lessons, begin to look at the ways you can operate differently for the next round of action.
  - Consider partners' involvement – who was integral to the action? Who could have been involved more deeply? Who holds unique perspectives on the action (e.g., youth stakeholders)?
- ❑ **Step 18: Enter a renewal process (see learning cycles in Section 5.A.).**
  - Check in with people about their participation, capacity, and experience.
  - Bring on new people or organizations.
  - Integrate new funding.
- ❑ **Step 19: Revisit foundation documents.**
  - Make changes to the principles or other grounding documents using lessons learned, new partnerships and perspectives, and changes to community needs.
- ❑ **Step 20: Realign and redesign the action plan and repeat.**
  - Build on the old action plan and re-design it to match the new approach if issues or problems persist.
  - Reconsider issues or problems that may have developed or grown since the coalition was established. How will you address them? Repeat needs assessment if needed.

The following are guiding questions to help you develop strong, sustainable, and trusting relationships between the ReCAST program team, community engagement body, and the city or county.

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***The most central component to engagement is relationship building and nurturing.***

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- 1) How do you cultivate relationships? What components are necessary?
- 2) Can you identify what shifts occur around people you dislike and/or distrust?
- 3) Can you identify what shifts occur around people you like and/or trust?
- 4) What is your conflict style and what is the conflict style of those around you?
- 5) What allows you to feel as though you belong?

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# 5

## **Keeping Your Momentum: Sustaining, Growing, and Evaluating Your Collaboration**

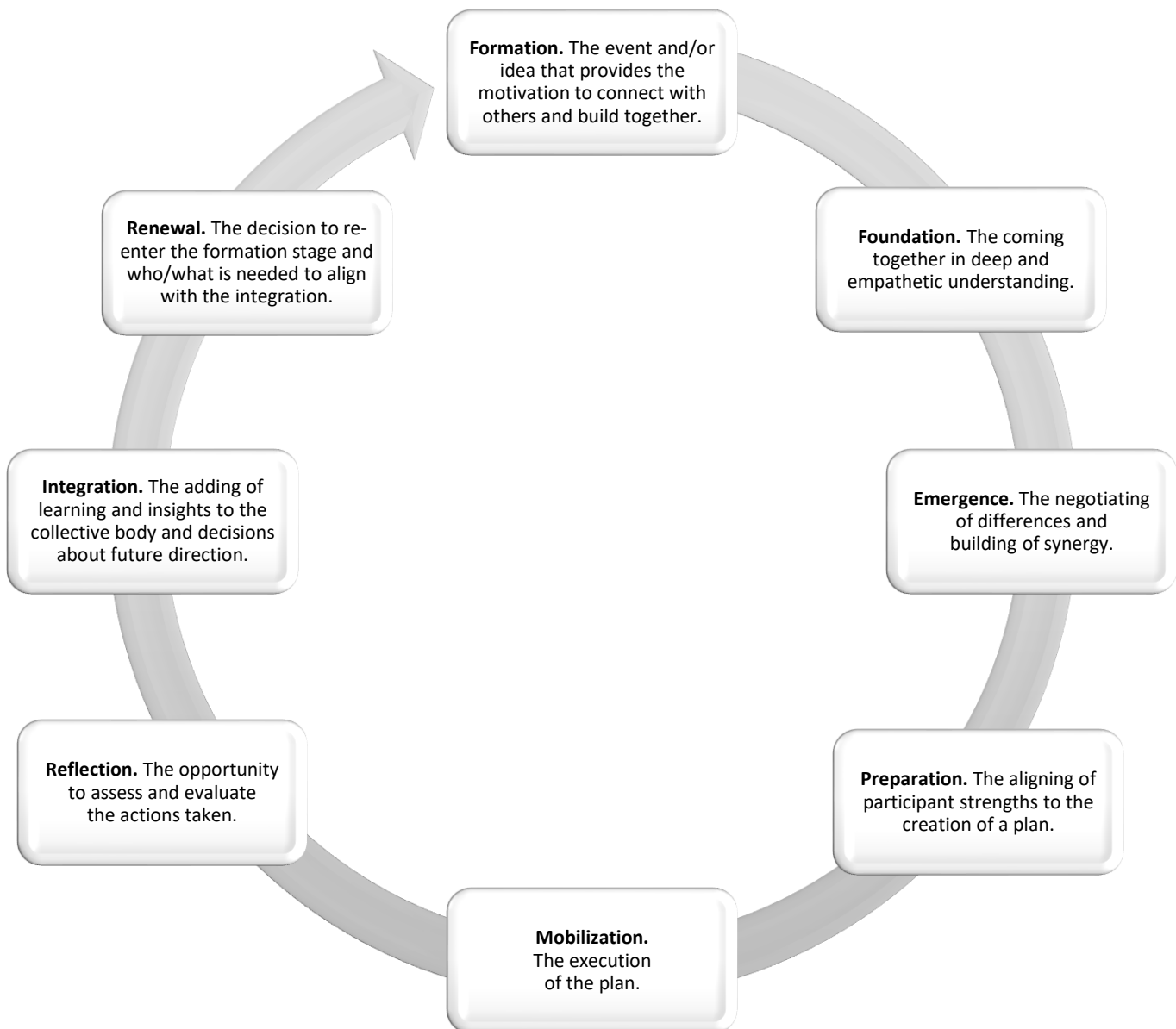
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## KEEPING YOUR MOMENTUM: SUSTAINING, GROWING, AND EVALUATING YOUR COLLABORATION

### 5.A. Coalition Learning Cycles

The effectiveness of a coalition relies on its ability to successfully work through as many “learning cycles” as possible. A learning cycle is how we describe the arch of actions which the coalition experiences. The more aware and intentional a coalition can be about going through each cycle in balance, the more effective it will ultimately be. Once there is a significant exterior event, the cycle should reset to the first cycle, regardless of how many cycles there have been.

Here are examples of each component of one cycle:<sup>14</sup>



<sup>14</sup> Source: Genesis Healing Institute.

In addition to understanding the components of the cycle, the key is understanding the balance of time and energy spent in each. Although there is no single approach that will work for all coalitions, the exhibit below is a breakdown of how much time and energy may be spent per cycle. ***This information is intended to help coalition participants understand the change in coalition scope and content over time, not to provide a firm rule.***

	First Cycle (%)	Second Cycle (%)	Third Cycle (%)
<b>Formation</b>	15	5	1
<b>Foundation</b>	20	5	2
<b>Emergence</b>	10	5	2
<b>Preparation</b>	5	20	25
<b>Mobilization</b>	5	20	25
<b>Reflection</b>	10	30	25
<b>Integration</b>	20	10	10
<b>Renewal</b>	15	5	10

### 5.B. How Is It Working? Tools For Evaluating Your Collaboration

Formally reflecting on how your community engagement body is working is critical to enhancing and sustaining your efforts. Is your community engagement body meeting its goals? Is it still adhering to its established principles? Are the roles, groups, and decision-making processes working to promote equitable participation?

#### Questions to ask in the evaluation might include the following<sup>15</sup>:

- Are the group’s efforts effective?
- Did it have a measurable result?
- Did the group efficiently use available resources?
- What lessons have we learned?
- What is changing in our collaboration itself?
- What needs to change? What is our highest priority for improving our partnership next year?

Evaluation of the group’s process should be incorporated into its modus operandi (method of operation). Success is not only about the project, it is also about the success of the coalition.

The tools below are provided to help you assess how your collaboration is functioning and collect stakeholder input to improve.<sup>15</sup> You can use, adapt, or combine and revise these tools to gain a more complete picture of multiple aspects of your collaboration.

- [Diagnosing the Health of Your Coalition](#) – This maintenance checklist is designed to provide a quick overview of where your coalition stands. Helpfully, it provides suggested steps for disseminating, using, and integrating recommendations from the checklist.
- [“Coalition Capacity Checklist” \(pp.38-39\) from What Makes an Effective Coalition?](#) – This checklist includes questions on leadership, management, adaptive capacity (e.g., resources), technical skills, and coalition culture.
- [Partnerships and Collaboratives: Diagnostic Tool for Evaluating Group Functioning](#) – This brief assessment tool asks each member of the group to rate how they feel the collaborative is functioning across key elements (e.g., Shared Vision, Conflict Management).

<sup>15</sup> Several resources extracted from: [Assessing Collaboration Functioning. Community Systems Development Toolkit. Build Initiative.](#)

- [Keeping Fit in Collaborative Work: A Survey to Self-Assess Collaborative Functioning](#) – This more detailed tool is designed to assess a group’s organizational functioning as well as progress on strategies, projects, or activities.
- [Collaborative Self-Assessment](#) – This survey focuses specifically on meetings and decision-making processes.
- [Self-Assessment/Self-Identification Tool: Evaluation of an Organization in an Existing Partnership](#) – This tool focuses on capacity areas such as cultural competence or humility, facilitation and leadership, and understanding of the community.

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# 6

## Closing

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## CLOSING

ReCAST is first and foremost a government funded project that is designed to be lead by city and county entities for and with community and city and county members. It is a complex, human and often a combination of frustration and joy.

We hope this guide and other resources support your efficacy in continuing to practice shared leadership and management so that your goals and outcomes of ReCAST can be realized, achieved, and sustained through and beyond the project.

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***“With a comprehensive action plan, a coalition can engage people, ideas, and resources across sectors to create a synergy of health and prevention efforts that will have a lasting effect on community health.”***

**- Frances Dunn Butterfoss  
Ignite!: Getting Your Community Coalition Fired Up for Change**

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# 7

## Appendix

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## APPENDIX A

### GUIDELINES FOR COALITION FACILITATORS/CONVENERS<sup>16</sup>

Coalitions, as complex as they may be, are made up of human beings in relationships with one another. We can take our cues for coalition building from our knowledge of how human connections develop. Just like human relationships, coalitions require attention, investment, trust, action, space, growth, and resources. *These considerations are designed to help conveners successfully facilitate and maintain coalition health across all stages identified in Section 5A, “Coalition Learning Cycles.”*

#### Past Experience

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- What is the organization’s experience in other coalition spaces in the past?
- Has this previous experience been made known to the other coalition members?
- Are there concerns on the part of the organization about participating in the coalition because of previous experiences?

#### Reputation

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- What is the reputation the participant brings into the coalition space?
- What role have they taken in other coalition spaces?
- Are there any misconceptions about this organization?
- What steps need to be taken to give the organization an opportunity to respond to perceptions about them?

#### Foundation

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- Does everyone know why the coalition exists?
- Does everyone know and agree to the basic set of values for the coalition?
- Does everyone have a similar understanding of the strategies being used by the coalition?

#### Conflict

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- When a conflict occurs in the coalition space, what process has already been established to address the conflict?
- How will the coalition collectively honor and recognize conflicts which cannot be readily resolved?
- What capacity is there to forgive within the group?

#### Patterns

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- As planning continues, are you noticing particular patterns in the space?
- Are there organizations who tend to take the lead on things?
- Are there organizations who are absent or sparsely attend meetings?
- Has there been an attempt to raise up and investigate these patterns?

#### Recognition

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- How is each member of the coalition recognized?
- What project components are held as a coalition and what project components are held by individual participants’ organizations?

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<sup>16</sup> Source: Genesis Healing Institute

## **Safety**

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- Are participating organizations able to remain in the space when feeling discomfort?
- Do participating organizations leave the space feeling as though there was nothing left unsaid?
- Are organizations able to raise fears and concerns openly?
- How is space made for all participating organizations to arrive and be present?
- Does every organization feel as though they can ask for what they need?

## **Agenda**

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- Does the agenda get sent to all members prior to the meeting?
- Are people allowed to give input on the agenda?
- Who is entrusted with facilitating the meetings?
- Is the amount of time given to each section ample for a robust discussion?
- Are there adequate breaks?
- Does the agenda account for the time of day, whether people will be hungry, or what has occurred to them prior to showing up for the meeting?
- Is there a consistent part of the agenda which links all the meetings (for continuity)?

## **Roles**

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- Does every organizations understand their roles/contributions as well as the roles/contribution of each participant?
- When there are questions about organizations' roles, where do they go?
- How does an organization change or alter roles?
- Does their role match their expertise, desire, and capacity?
- Has each organization made their intentions and expectations known to the collective?
- Is each organization put in the best place to contribute from their stronger gifts?
- Who is keeping notes?
- Who is entrusted with communication to the public and to other partners?
- Who is entrusted with the financial sustainability of the coalition?

## **Openness**

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- In general, how accepting is the collective of organizations to new ideas and approaches?
- What is the ratio of "questions" to "statements" during conversations?
- How much active and engaged listening is occurring?
- Is there a rush or urgency that is unfounded within the group?
- How much judgement is occurring in the space?
- What space exists for the coalition to grow and shift to the environment and community needs?

## **Outside Lens**

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- Are there trusted community leaders who can serve as outside observers and supports to the coalition?
- What things are missing within the coalition?
- What things are outside the responsibilities of the coalition?

## **Benefits**

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- Is it known what each participating organization would like to receive from the coalition?
- Is it known what each participating organization would need to support continuing participation?

### **Division**

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- Is there intention behind the creation of small groups or sub-committees?
- How does each sub-group interact with each other and the larger space?
- Are the sub-groups all strategically supporting the overall vision and goals of the coalition?
- What attention is given to the participating organizations who are the least active?

### **Celebration**

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- How do the participating organizations celebrate accomplishments?
- How are small accomplishments celebrated?
- How are large accomplishments celebrated?
- How are failures (big and small) celebrated?
- How is gratitude shared in the space?

### **Bonding**

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- What activities do the organizations engage in outside of the context of the coalition?

## APPENDIX B

### ONLINE PLATFORMS FOR COLLECTIVE COMMUNICATION & COLLABORATION

Platform	Description	Features & Considerations	Costs	Resources
<a href="#">Google Groups</a>	Google Groups provides discussion groups for people/teams. Discussions are organized and searchable.	<ul style="list-style-type: none"> <li>• Threaded conversations – either through web interface or email</li> <li>• limited to conversation threads – not file sharing</li> <li>• Google drive must be setup to share files</li> <li>• Requires a Google account to sign in</li> </ul>	<ul style="list-style-type: none"> <li>• A free service included with having a free Gmail account (@gmail.com)</li> </ul>	<p><a href="#">Watch intro video</a></p> <p><a href="#">Read how to set-up</a></p>
<a href="#">Slack</a>	Slack is designed to facilitate efficient collaboration across teams.	<ul style="list-style-type: none"> <li>• File sharing</li> <li>• Chat and threaded conversations</li> <li>• Searchable message archives</li> <li>• Voice and video calls</li> <li>• File storage</li> </ul>	<ul style="list-style-type: none"> <li>• Free for limited usage</li> <li>• \$6.67 per month for additional features</li> <li>• \$12.50 per month for full features</li> </ul>	<a href="#">Watch set-up tutorials</a>
<a href="#">Asana</a>	Asana is a project management tool	<ul style="list-style-type: none"> <li>• Storage relies on secondary applications – file storage is integrated with cloud providers Dropbox, Google Drive, and Box</li> <li>• Individual files uploaded to Asana, there's a 100MB limit per individual attachment</li> <li>• Chat features allow users to sort, filter, and un-follow conversations that no longer apply to them</li> <li>• Calendar and collaboration tools</li> <li>• Pre-made templates for workflow</li> </ul>	<ul style="list-style-type: none"> <li>• Free for teams of 15 or fewer</li> </ul>	<p><a href="#">Watch set-up tutorials</a></p> <p><a href="#">Watch set-up tutorials</a></p>
<a href="#">Basecamp</a>	Basecamp is a project management system that gives a 10,000 ft. perspective across multiple projects, while also providing detailed features for each project: to-do's, timelines, communication, and attaching documents.	<ul style="list-style-type: none"> <li>• Capability of storing 100 GB of files</li> <li>• Mature, user-friendly, simple</li> <li>• Similar to Wiggio, but more established</li> <li>• Share working products for users to view and remark on</li> <li>• Sends users a daily email to review what tasks were completed the prior day</li> <li>• Calendar and collaboration tools</li> <li>• Lacks in reporting features</li> </ul>	<ul style="list-style-type: none"> <li>• \$29 per month for basic access and storage</li> <li>• \$79 per month for more client related capabilities for coordination and communication around products and work</li> </ul>	<p><a href="#">Read set-up process</a></p> <p><a href="#">Watch set-up tutorials</a></p>

<a href="#"><u>Bitrix24</u></a>	Bitrix24 is a project management system	<ul style="list-style-type: none"> <li>• Task management</li> <li>• Workflow monitoring</li> <li>• Document sharing</li> <li>• Activity streams</li> <li>• Photo galleries</li> <li>• Integrated time-tracking</li> <li>• Mobile app</li> <li>• Integration of social networks</li> <li>• An all-in-one tool that has vast capability,</li> <li>• May overwhelm an audience that is not accustomed to online coordination and communication of projects</li> </ul>	<ul style="list-style-type: none"> <li>• Free – 5GB</li> <li>• \$39 per month – 24 GB</li> <li>• \$99 per month – 100 GB</li> <li>• \$199 per month – unlimited</li> </ul>	<a href="#"><u>Watch intro video</u></a>  <a href="#"><u>Watch set-up tutorials</u></a>
<a href="#"><u>DropBox</u></a>	Dropbox is a web-based file-sharing system for photos, videos, and documents.	<ul style="list-style-type: none"> <li>• Updates to content-sharing syncs across devices</li> <li>• Manage/organize content in folders</li> <li>• When you edit a file in shared folder, everyone gets the update automatically. No need to email versions back and forth.</li> <li>• Customer support depending on the plan purchased</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• \$12.50 per month for 2TB</li> <li>• \$20 per month for unlimited storage</li> <li>• Enterprise edition – contact for pricing</li> <li>• Free trial periods</li> </ul>	<a href="#"><u>Read set-up process</u></a>
<a href="#"><u>Yammer</u></a>	Yammer provides a platform for you to communicate and collaborate privately with your colleagues. Employees sign in with a company email address, and can use the platform via web, desktop or mobile.	<ul style="list-style-type: none"> <li>• Microsoft platform</li> <li>• Use your Outlook inbox to view, prioritize, and manage Yammer</li> <li>• Allows chat</li> <li>• File sharing and uploading</li> <li>• Multiple entry points</li> <li>• Collaborate with external partners</li> <li>• Mobile app</li> </ul>	<ul style="list-style-type: none"> <li>• Free or without license as long as you can register a valid company email.</li> <li>• To use Yammer Basic or sans Admin tools, registration with Office 365 is not required</li> </ul>	<a href="#"><u>Watch intro video</u></a>  <a href="#"><u>Watch more videos</u></a>  <a href="#"><u>Read about features</u></a>
<a href="#"><u>Wizehive</u></a>	Wizehive is a cloud-based management system that organizes and streamlines business processes and content.	<ul style="list-style-type: none"> <li>• Grants management</li> <li>• Scholarships management</li> <li>• Awards management</li> <li>• Fellowships management</li> <li>• Internships management</li> <li>• Accreditations management</li> <li>• Integrates with Slack, Mailchimp, Quickbooks</li> </ul>	<ul style="list-style-type: none"> <li>• Pricing is not shown online</li> <li>• <a href="mailto:sales@wizhive.com"><u>sales@wizhive.com</u></a></li> <li>• 1-877-767-9493</li> </ul>	<a href="#"><u>Watch set-up tutorials</u></a>
<a href="#"><u>Group Rocket</u></a>	Group Rocket is a group communication and engagement app, which you can use to setup a niche IRC platform	<ul style="list-style-type: none"> <li>• Onboarding landing page</li> <li>• Domain based registration</li> <li>• Public and private communication channels</li> <li>• Integration and hooks with external platforms and software</li> </ul>	<ul style="list-style-type: none"> <li>• \$199 one-time purchase that includes Android app, web version, 100% source code, installation document, life time</li> </ul>	<a href="#"><u>Read user guides</u></a>

		<ul style="list-style-type: none"> <li>• Provisions for time zones</li> <li>• Billing integration</li> <li>• Team management and messaging</li> <li>• Full text search on public and private channels</li> </ul>	free upgrades, tutorials	
<a href="#">Clinked</a>	Clinked combines Enterprise Social Networking, Project Management, and File Management under the same software	<ul style="list-style-type: none"> <li>• Pages - Wiki style document/page creator. An advanced document editor.</li> <li>• Files - Store files, share files, comment on files.</li> <li>• Discussions - Discussion boards on which you can discuss projects or hold meetings etc.</li> <li>• Events - Events calendar to manage your key events.</li> <li>• Tasks - Manage your project here, set tasks and deadlines. Clinked will also notify you when you're close to your deadline etc.</li> </ul>	<ul style="list-style-type: none"> <li>• \$14 per month for 10 members, unlimited guests</li> <li>• \$49 per month for advanced permissions and features</li> <li>• Enterprise edition – contact for pricing</li> <li>• Free trial periods</li> </ul>	<a href="#">Watch intro video</a>  <a href="#">Watch set-up tutorials</a>
<a href="#">Social HubSite</a>	The cloud-based system combines an integrated set of collaboration, community management, and publishing features that enable users to centralize communication.	<ul style="list-style-type: none"> <li>• Designed specifically for associations and non-profits</li> <li>• Upload, store, sort documents</li> <li>• tracks different document versions, if being edited</li> <li>• Meeting management</li> <li>• Member-Check-in's automatically send users follow-up requests</li> </ul>	<ul style="list-style-type: none"> <li>• \$9 per month for 10 members and 2GB</li> <li>• \$29 per month for 50 members and 10 GB</li> <li>• \$99 per month for 2,000 members and 100 GB</li> </ul>	<a href="#">Watch set-up tutorials</a>
<a href="#">Group Spaces</a>	GroupSpaces is a platform for managing membership groups – clubs, hobbies, charities, professional associations, alumni networks and more. It's a self-serve online platform.	<ul style="list-style-type: none"> <li>• Group discussion board</li> <li>• Group website</li> <li>• Member database</li> <li>• Group mailing list</li> <li>• Organize files in folders</li> <li>• Email newsletters</li> <li>• Organize events</li> <li>• Sell tickets</li> <li>• Host forums</li> <li>• Organize member records</li> <li>• Targeted towards organizations that fundraise</li> </ul>	<ul style="list-style-type: none"> <li>• \$14.99 for 500 members and 5 GB</li> <li>• \$19.99 per month for 2,000 members and 10GB</li> <li>• \$49.99 per month for 5,000 members and 50GB</li> <li>• \$99.99 per month for 10,000 members and unlimited storage</li> </ul>	<a href="#">See examples</a>

# APPENDIX C

## SAMPLE MEMBER AGREEMENT AND JOB DESCRIPTION

### ReCAST Committee Job Description and Member Agreement<sup>17</sup>

ReCAST's XYZ Coalition's mission is to [insert mission statement here]

#### SUMMARY

Members of the ReCAST XYZ Coalition are stewards of the project. They serve [insert time amount here] terms and provide leadership, make policy and have ultimate fiscal and ethical responsibility for implementing the Coalition's mission.

#### COMMITTEE MEMBER RESPONSIBILITIES

[Note: this are to be adapted for your specific needs]

##### *Fiscal and Financial*

- Responsible for the prudent fiscal oversight of ReCAST funds and expenditures.
- Provide oversight for the funds distributed to ReCAST sub-grantees.
- Responsible for the successful dissemination of funds through community grants (e.g. the community participatory budgeting process).

##### *Policy and Organization Oversight*

- Assist in policy development and participate in all deliberations and decisions affecting ReCAST.
- Participate in reviews of ReCAST's mission, vision, programs and services.
- Contribute to the successful process and completion for key SAMHSA ReCAST deliverables (DIS, CNRA, Strategic Plan)

##### *Commitment*

- Attend quarterly committee meetings for a year term [Modify attendance per ReCAST site].
- Take leadership roles during each term by participating as one of the following: Co-chair, Treasurer, Secretary, Grants Chair, Outreach Chair [Modify roles per ReCAST site].
- Participate in sub-committees, special events and other related events as needed.
- Use professional skills and experience to assist reCAST in meeting its goals (i.e., legal, education, marketing, budget, financial management, community networking, etc.)
- Share distinct point-of-view during discussions and participatory decision-making.

#### QUALIFICATIONS

- A passion for the mission, programs and services of ReCAST XYZ and a commitment to contribute to the goals and outcomes of the project.
- Willingness to commit [2-6 hours] quarterly for committee meetings
- Pledge to treat all information in a confidential, ethical manner and to avoid any conflicts of interest.

#### ReCAST XYZ Coalition Committee Member Agreement

If elected as a committee member, I agree to support and uphold the mission of the ReCAST XYZ Coalition. I am committing to all of the responsibilities and expectations described above. If I am unable to meet my obligations, I understand that I may be asked to offer my resignation.

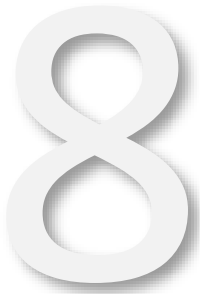
Member printed name \_\_\_\_\_

Member signature and date \_\_\_\_\_

ReCAST XYZ Chair [if applicable] signature of acceptance and date \_\_\_\_\_

<sup>17</sup> Adapted from the [2016 Multnomah County Cultural Coalition Committee Job Description & Member Agreement](#)

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A large, light gray, stylized number 8 with a subtle drop shadow, positioned to the left of the section title.

## **Further Resources**

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## FURTHER RESOURCES

- ["Coalition Building I: Starting a Coalition"](#) and ["Coalition Building II: Maintaining a Coalition"](#) at the *Community Tool Box*
- ["Coalition Building" at \*Beyond Intractability\*](#)
- ["Five Principles for Building Powerful Coalitions" at \*Talking Union\*](#)
- ["Best Practices and Lessons Learned Along the Way" at \*Coalition Building: The Power of Many\* from the American Library Association](#)
- ["Best Practices in Collaboration" at \*Coalition to Advance Learning\*](#)
- [\*Developing Effective Coalitions: An Eight-Step Guide\* from the Prevention Institute](#)
- ["Coalition Building" from \*Protest.Net\*](#)
- ["Coalition Building" at \*GSA Network\*](#)
- ["Coalition-Building Primer"](#)
- [National Coalition Building Institute \(NCBI\)](#)
- ["Pan-Asian Coalition Building: How Do We Do It?" from South Asian Women for Action](#)
- ["Work Together" at \*County Health Rankings & Roadmaps\*](#)
- [\*Working Upstream: Skills for Social Change\*](#)
- [\*Tom Wolff & Associates: Coalition Building for Healthy Communities\*](#)



**ReCAST Technical Assistance Center**  
**Toll-Free Phone: (844) 856-1749**  
**Email: [NITT-TA@cars-rp.org](mailto:NITT-TA@cars-rp.org)**  
**Website: [www.samhsa.gov/NITT-TA](http://www.samhsa.gov/NITT-TA)**