



**Quality Improvement
Organizations**

Sharing Knowledge. Improving Health Care.
CENTERS FOR MEDICARE & MEDICAID SERVICES

SUPERIOR HEALTH
Quality Alliance

Using Leadership, Organizing, and Action to Build a Coalition

Participant Guide

Using Leadership, Organizing, and Action to Build a Coalition

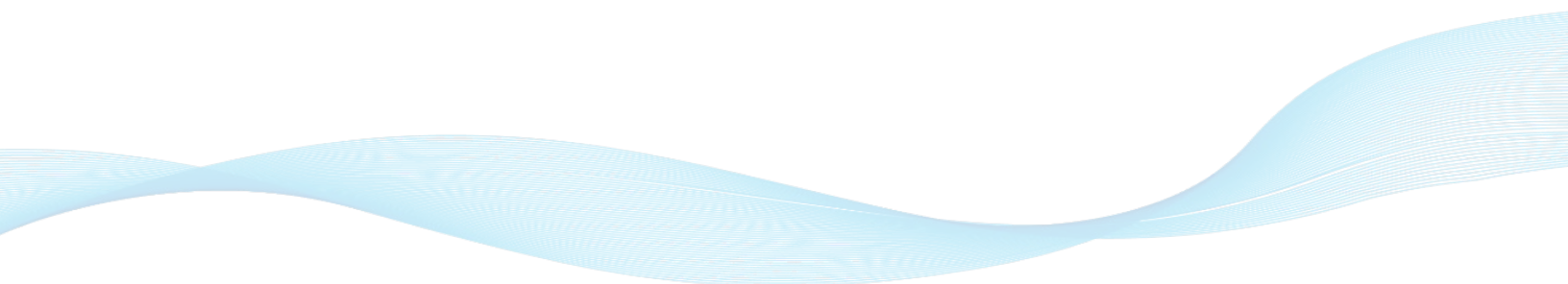
Participant Guide

Goals for Leadership, Organizing and Action (LOA)

This training will help you mobilize new stakeholders, deepen relationships with existing stakeholders and accelerate progress on your current initiatives through:

- Developing a short, compelling call to action, based on your own leadership story.
- Creating intentional strategies for community engagement.
- Utilizing best practices in building strong, effective teams and coalitions.

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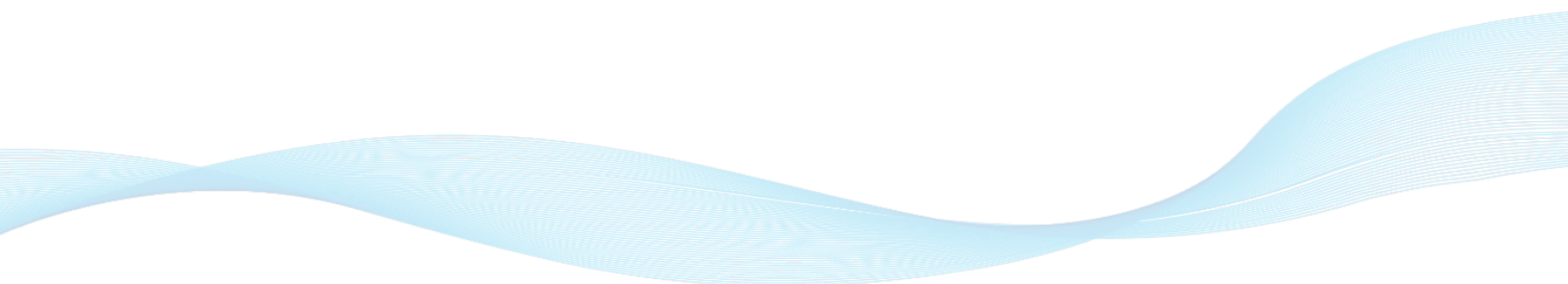
Below are the Covenants of Presence. Please read them before starting and keep them in mind while going through the course. They can also be used to engage and set the tone for your first coalition meeting.

Covenants of Presence

Adapted from touchstones used in the Center for Courage and Renewal's Circles of Trust retreats.

The shy soul cannot show up without the assurance of safe relational space.

1. Be fully present, extending and presuming welcome. Set aside the usual distractions of things undone from yesterday, things to do tomorrow. Welcome others into this space and presume you are welcome as well.
2. Listen generously. Listen intently to what is said, listen to the feelings beneath the words. As Quaker Douglas Steere writes, "To 'listen' another's soul into a condition of disclosure and discovery may be almost the greatest service that any human being ever performs for another."
3. Author your story. We all have a story. Some might say, "I don't have a story," or "I don't have a story worth telling," but you do, and the world needs to hear it. You must claim authorship of your own story and learn to tell it to others so they might understand you; be inspired by you; and discover what calls you to be who you are, to do what you do or to love what you love.
4. We come as equals. We don't have the same gifts, limits or experiences, but no person's gifts, limits or experiences are more or less important than another's.
5. It is never "share or die." You will be invited to share your thoughts in pairs or in a large group. The invitation is exactly that. You will determine the extent to which you want to participate.
6. No fixing. We are not here to set someone else straight, right a wrong or provide therapy.
7. Set aside your judgments. By creating a space between judgments and reactions, we can listen to another person, and to ourselves, more fully.
8. Turn to wonder. If you find yourself becoming judgmental or cynical, try turning to wonder: "I wonder why she shared that story or made those choices?" "I wonder what my reaction teaches me?" "I wonder what he's feeling right now?"
9. Hold what people say today with care. There are many people who will benefit from what they hear during our time together. Be mindful, attentive and open.
10. Be mindful and respectful of time. We all have something important to share and the discipline of time invites us to focus and make particular choices about what to share and how much to share so we might hear each other more deeply.
11. Practice confidentiality. We create a safe space by respecting the nature and content of what is said today. If anyone asks that something shared be kept in confidence, the group will honor that request.
12. Welcome discomfort and dislocation. Amid new and uncomfortable places and the company of strangers, move against an instinct to construct a mental space of safety or to check out. In what causes unease, see another world to be discovered.

- 
13. Love the questions themselves. Let your questions linger. Release the compulsion to answer them or to have them answered. Trust the questions to guide you toward loving first what you do not altogether understand. As the poet Rainer Maria Rilke says, “Have patience with all that remains unsolved within your heart.”
 14. Believe that it is possible for us to emerge from our time together refreshed, surprised and less burdened than when we came. Expect that our work together can provide renewal, refreshment and possibilities for what we can do together to create the future that is waiting to be born. The seeds planted here will keep growing and flourish in the days ahead in the service of your renewing work in this community.



SESSION 1: INTRODUCTION TO LEADERSHIP AND COMMUNITY ENGAGEMENT

EXERCISE: Develop Your Call to Action

Think of one ask, request or invitation you would like to make to a person or group concerning your work. Try to be as specific as possible.

Write your ask, request or invitation in the space below.

SESSION 2: STORY OF SELF AND CALL TO ACTION

EXERCISE: Develop and Practice Your Story of Self with a Call to Action

This exercise will assist in engaging the community members you want to participate in your coalition. The story of self will help them understand why you are driven to this work.

Reflect on the story of self that was provided at the beginning of the recording that the group facilitator shared, then develop your own story of self with a call to action, using the question prompts below.

Your story should be no more than three minutes long. To practice, find a co-worker, friend or family member and share your story, asking for feedback and suggestions. If this is not possible, practice telling your story in a mirror or record it and listen to it when you are done.

WORKSHEET: Developing Your Story of Self and Call to Action

Before you decide what part of your story to tell, think about these questions:

- What is my purpose in calling on others to join me in action? What will I be calling on them to do?
- What values move me to act? How might they inspire others to similar action?
- What stories can I tell from my life about specific people or events that would show (rather than tell) how I learned or acted on those values?

Possible categories of experiences in your life that have shaped the values that call you to leadership:

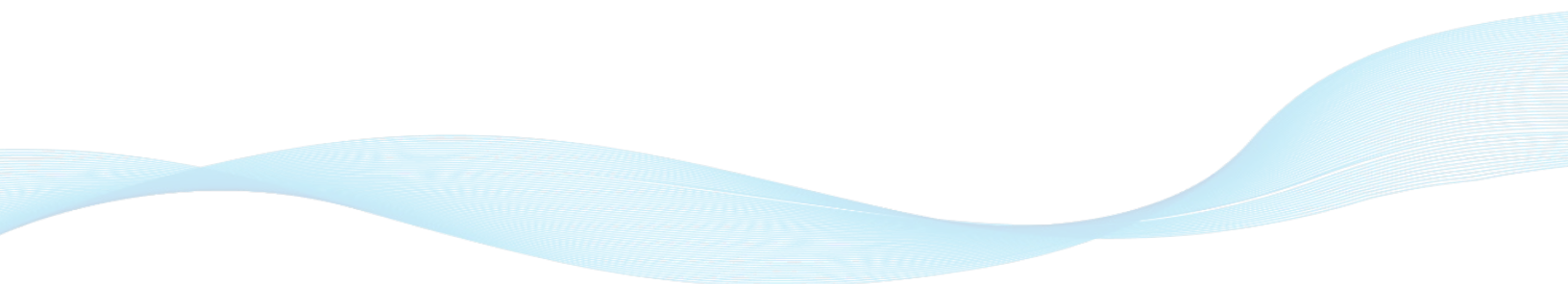
Family and Childhood	Life Choices	Leadership Experiences
<ul style="list-style-type: none">• Parents/family.• Experiences growing up.• Your community.• Role models.• School.	<ul style="list-style-type: none">• School.• Career.• Partner/family.• Hobbies/interests/talents.• Experiences finding passion.• Experiences overcoming challenge or loss.	<ul style="list-style-type: none">• First experience of health care or activism.• Connection to key books or people.• Role models.

Use this space to record your first thoughts.

Next, think about the challenge, choice and outcome in your story. The story might be how you reacted to the crisis of a loved one – the way you responded to an urgent moment. The outcome might be what you learned, in addition to what happened. Think in images. Powerful stories leave your listeners with images in their minds that shape their understanding of you and your calling.

Challenge	Choice	Outcome

Connect your story of self to your call to action in the space below.



If you are stumped, use the following questions to help prime the pump of your memory and imagination. Remember that this is simply an introduction to a practice that you can build on later.

- Recall the moment when you first felt called to the work of community health or health care. How did you respond? Be descriptive.
- Is there a person in your life or history who taught you the value of boundary crossing and empowering others? What did they do? What did you do in response? Be descriptive.
- When did you first see that the opportunity for collaboration would lead to accomplishing more than working on your own? What did you do in response? Be descriptive.
- What is special about your community? What story can you tell about this community that makes the hard work of this collaborative critically important to accomplish? What choice have you made in response? Be descriptive.

COACHING TIPS: Story of Self with a Call to Action

Remember to balance both positive and constructive critical feedback. The purpose of coaching is to listen to the way stories are told and think of ways that the storytelling could be improved.

DON'T simply offer vague “feel-good” comments. (“That was a really great story!”)

DO coach each other on the following points:

The Challenge: What were the specific challenges the storyteller faced? Did the storyteller paint a vivid picture of those challenges?

“When you described _____, I got a clear picture of the challenge.”

“I understood the challenge to be _____. Is that what you intended?”

“The challenge wasn’t clear. How would you describe _____?”

The Choice: Was there a clear choice that was made in response to each challenge? How did the choice make you feel? (Hopeful? Angry?)

“To me, the choice you made was _____, and it made me feel _____.”

“It would be helpful if you focused on the moment you made a choice.”

The Outcome: What was the specific outcome that resulted from each choice? What does that outcome teach us?

“I understood the outcome to be _____, and it teaches me _____. How does it relate to your work now?”

The Call to Action: Is there a clear, specific ask or call to action? Is it compelling, consequential and urgent?

The Values: Could you identify what this person’s values are and where they came from? How? How did the story make you feel?

“Your story made me feel _____ because _____.”

“It’s clear from your story that you value _____, but it could be even clearer if you told a story about where that value comes from.”

The Details: Were there sections of the story that had especially good details or images (e.g., sights, sounds, smells or emotions of the moment)?

“The image of _____ really helped me identify with what you were feeling.”

“Try telling more details about _____ so we can imagine what you were experiencing.”

Record feedback/comments from your team members here.

EXERCISE: Develop and Practice Your Story of Self with a Call to Action

This exercise can be used with your co-workers, coalition executive team or planning group. As you hear each other’s stories, keeping track of the details of each person’s story will help you provide feedback and remember details about them. Use the grid below to track your team’s stories in words or images.

Name	Vivid Details	Challenge	Choice	Outcome

SESSION 3: DEVELOPING YOUR RELATIONAL STRATEGY

EXERCISE: Mapping Actors

The purpose of this exercise is to help you and your leadership team (planning or executive team) envision where your recruitment efforts should be prioritized over time. You will:

- Revisit your vision for change.
- Take stock of your current resources and the resources you need to realize your aim.
- Create a map of actors or stakeholders within your community.
- Decide who you will reach out to first.

Brainstorm the resources that your team already has.

Sometimes the most precious resources we have are the ones that are so close to us that we cannot see them (e.g., a building, knowledge about how to throw a party, our bodies). Brainstorm the resources that already exist on your team. Use the chart below to spur your creative thinking about resources on your team.



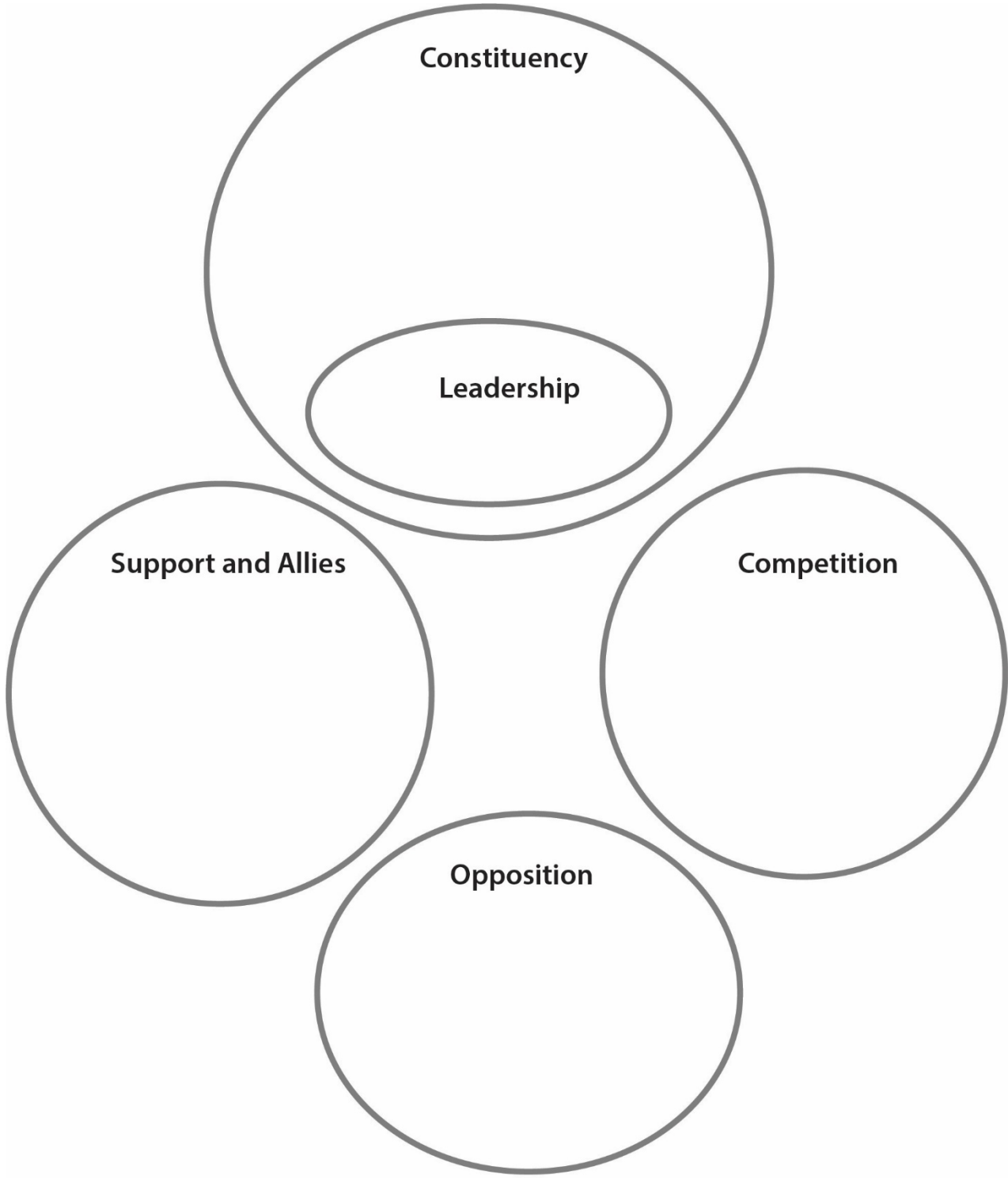
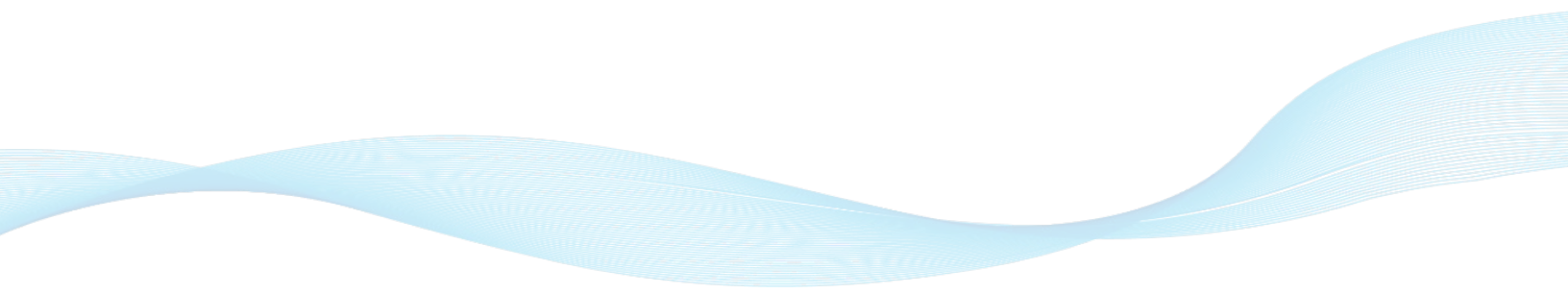
Create your map of actors.

When strategizing, it is also important to consider resources you have access to through your relationships. Using the worksheet below, draw your map of actors. Who can you connect with? What are their resources?

Brainstorm each of the actors. What are their names? Which organizations do they work in or lead? What are their resources? For each person, write this information in the appropriate category (constituency, supporter, etc.) on the diagram.

TIP: Focus primarily on mapping your constituency.

NOTE: If you are completing this as a group, you might want to use sticky notes and a poster board.



EXERCISE: Identifying and Prioritizing Your Recruitment and Engagement Efforts

Now that you have developed your actors map, identify the top five to 10 individuals and organizations you will commit to meet with in the next month to deepen your community engagement and achieve your aims. Note these names below, along with delegating which team member will reach out to them.

	Name	Organization	Who on your team will conduct the meeting?	Who can help you get an introduction?
	<i>Example: Kathy, Director of Programs</i>	YMCA	<i>Ella</i>	<i>Max from Greater Interfaith Org (GIO)</i>
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

SESSION 4: BUILDING RELATIONSHIPS

EXERCISE: 1:1 “Speed Dating”

In this exercise, you will practice the art of the 1:1 conversation by using probing questions to learn who another person is, what has defined them over their life and what drives them. Reflect on what comes up and discern shared values, interests and resources.

This exercise works best with a partner. Practice with someone at your organization. If this is not possible, practice giving your “building relationships” speech while looking in a mirror or recording yourself.

Item	Topic	Time
1.	<p>If you are doing this exercise with a partner, ask them to engage in a role-play conversation with you about why they would be interested in joining your coalition work.</p> <p>If you are doing this exercise alone, practice giving your speech in a mirror or record it and listen to it when you are done.</p> <p>The initiator will introduce themselves, then try to learn, in an intentional way, who the other person is. Probe with “why?” questions to get to stories about specific experiences, people and choices that shaped the other person’s life and reveal his/her deeper motivations and desires.</p> <ul style="list-style-type: none">• What do they care about most?• What led them to quality improvement? <p>Listen for shared interests, values and resources. The initiator should share parts of their own story as well. If there is overlap, identify common interests and resources and ask for further commitment.</p> <p>Briefly record some notes from your partner or from your own insights to clarify your story.</p>	10 min.
2.	<p>If you are working with a partner for this exercise, ask them to think about the questions below during the conversation and provide you feedback.</p> <p>If you are doing this exercise by yourself, think about the questions and how well you addressed each one. Can your questions be improved or clarified at all?</p>	10 min.

Listening During the 1:1

As you hear each other's stories, keep track of details using the following grid. Possible starting questions:

- Do you have a sense of this person’s values? What are their deepest priorities? What do they care about most?
- What are their leadership qualities?
- What are their interests? Resources?

Values / Priorities	Skills, Interests and Resources

SESSION 5: BUILDING EFFECTIVE TEAMS AND COALITIONS

EXERCISE: Diagnostic Checklist

Complete the diagnostic checklist thinking of a team of which you are a member. This can also be a good exercise to do with a leadership team as a group exercise.

The checklist is organized into three sections:

- **A Real Team with the Right People:** Section one asks you to look at the team as a whole and evaluate how it works together.
- **Compelling Purpose:** Section two assesses the degree to which the team's purpose engages members' motivations and orients them in a common direction.
- **Enabling Structure:** Section three evaluates the effectiveness of how the group makes decisions and adheres to team norms.

Assess the leadership team's design.

Move through the checklist by starting in the middle column of each section. For each statement in a section, assign a grade (A, B, C, D or F). For example, you might assign an "A" to the first statement, "The team is bounded."

The grade you assign to some statements might be clear-cut, while the grade for others might require more discussion. You can start with whichever section you choose and feel free to jump around sections; you do not have to complete this in an orderly fashion.

Assign an overall grade.

A team's score for each section is computed by averaging assessment responses for each statement.

Identify and write out steps for improvement.

Once you have computed an overall grade for each section, discuss with your team members how you did. In which areas is your team strongest? What about the areas where you may need to improve? Write down the solutions and next steps your team can take to improve your design.

NOTE: When using this with a collaborative or organization, as your leadership team grows and evolves, make sure to return to this checklist every so often to ensure your team remains effective and stays on a positive trajectory over time.

WORKSHEET: Diagnostic Checklist

	How is the leadership team's design? A B C D F	How might we improve our design?
A Real Team with the Right People <div style="border: 1px solid black; width: 50px; height: 50px; margin: 10px auto;"></div> Grade Overall	<input type="checkbox"/> The team is bounded. <input type="checkbox"/> The team is stable. <input type="checkbox"/> The team is interdependent. <input type="checkbox"/> Members have a diversity of roles and perspectives. <input type="checkbox"/> Members have collaborative skills such as empathy and integrity.	
Why did you give your team this grade?		

	How is the leadership team's design? A B C D F	How might we improve our design?
Compelling Purpose <div style="border: 1px solid black; width: 50px; height: 50px; margin: 10px auto;"></div> Grade Overall	<input type="checkbox"/> The team has a shared purpose that is clear to all members. <input type="checkbox"/> The shared purpose is consequential. <input type="checkbox"/> The shared purpose poses a significant challenge that will demand people's best efforts.	
Why did you give your team this grade?		

	How is the leadership team's design? A B C D F	How might we improve our design?
Enabling Structure <div style="border: 1px solid black; width: 50px; height: 50px; margin: 10px 0;"></div> Grade Overall	____ We have clear roles and responsibilities. ____ The tasks we do are real leadership work involving important joint decisions. ____ The group has explicit norms of conduct that specify acceptable and unacceptable behavior.	
Why did you give your team this grade?		

Reflect on the following questions as you develop a plan for improving your team's effectiveness.

Which areas require the most improvement?

What are the barriers to changing this condition?

What can you do to help put this condition into place? Consider at least three next steps.

SESSION 6: DEVELOPING TEAM STRUCTURE, PURPOSE, NORMS AND ROLES

EXERCISE: Developing a Strong Team Structure

In this exercise, you will develop your team purpose, identify the norms you will practice as a team and define your leadership roles. As you work, think of key learnings from the exercise.

This structure can be used at your coalition planning or executive team meeting, as well.

1.	Think of a community organization, collaborative or group of which you are a member. With this organization in mind, develop a shared purpose using the worksheet that follows.
2.	<p>Think about how you would introduce the shared purpose with a small planning group or executive team for your coalition. Once you have developed your shared purpose statement, follow the steps below:</p> <ul style="list-style-type: none">• What was your thought process in developing the shared purpose?• Are there any ideas as to how the shared purpose could be changed or refined? <p>If you are doing this exercise with a small group, are there any similarities with other members' shared purpose statements?</p>
3.	Decide on team norms or ground rules that will enable you to function with shared commitment. Use the worksheet that follows.
4.	Determine team roles . Using the list of roles as a starting point, brainstorm what roles your team will need. What are the responsibilities of each role? What gifts are needed for each role? How can you best divide the roles based on individuals' gifts and interests?
5.	What did you learn about how to structure and run a good team? What practice was most applicable to your work?

WORKSHEET: Developing Shared Purpose

Clarify your own thinking about what the purpose of your team could be as you work on a project together:

- In the first column, write down your **constituency** – who you are recruiting to engage in the work of the project.
- In the second column, write down the **values and visions** – any details you think speak to the team's motivation – that resonated with you during your 1:1s.
- In the third column, write down the kinds of **activities** your team could engage in to fulfill its purpose.

We are organizing: (the people you will recruit to do the work) (e.g.) <ul style="list-style-type: none">• Hospital providers.• Areas on Aging.	Vision and values: (e.g.) <ul style="list-style-type: none">• Quality of care.• Adherence to patient's wishes.	We will achieve this by: (consider outcomes, relationships and capacity) (e.g.) <ul style="list-style-type: none">• Collaborating on a new program.• Reducing unnecessary hospital readmissions.• Promoting antibiotic stewardship.
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After considering answers to all these questions, write a few sentences that you think best describe your team's purpose below.

Our team's shared purpose is to:

--

Below is an example of how a team or collaborative can develop a shared purpose as a group.

As you complete your shared purpose statement, grab a marker and write your statement on a large piece of newsprint for your team to see. Use as many sheets as you need. After each person on your team writes their statement, take a moment to discuss similarities and differences. With the group's input, the small group facilitator circles the words that seem to resonate most strongly with the team.

Choose someone to craft the shared purpose into a few sentences. This can be discussed and approved at the next team or coalition meeting. Continue to review and, perhaps, refine this statement as much as necessary, but avoid group wordsmithing by assigning an editor for the group.

WORKSHEET: Developing Team Norms and Ground Rules

Review the sample team norms below. Add, subtract or modify to create norms for your team. Be sure to include group norms on each theme below and how you will self-correct if the norm is broken. (If you do not self-correct, the new norm will be breaking the norms.)

Discussion and Decision-making: How we will discuss options and reach decisions as a team to ensure vigorous input and debate?	
<u>Always Do</u> <ul style="list-style-type: none">• Engage in open, honest debate.• Ask open-ended questions.• Balance advocacy with inquiry. Consensus, voting or delegating when making a decision?	<u>Never Do</u> <ul style="list-style-type: none">• Engage in personal attacks.• Fail to listen to what others say.• Jump to conclusions.• Resort to a lack of transparency.
Meeting Management: How will we manage meetings to respect each other's time?	
<u>Always Do</u> <ul style="list-style-type: none">• Start on time; stay on time; end on time.• Be fully present throughout the meeting.• Send the agenda a day in advance. Teams work best when you have a regular, reliable time to coordinate together. What will your team's regular meeting time and place be?	<u>Never Do</u> <ul style="list-style-type: none">• Come to meetings unprepared.• Answer a cell phone or email during meetings.

Accountability: How will we delegate responsibilities for actions and activities? How will we follow through on commitments?

Always Do

- Clarify understanding.
- Provide follow-up on action items.
- Ask for/offer support when there is a need.
- Weekly check-in.
- Let team know when you cannot complete an assigned task.

How will you self-correct if norms are not followed?

Never Do

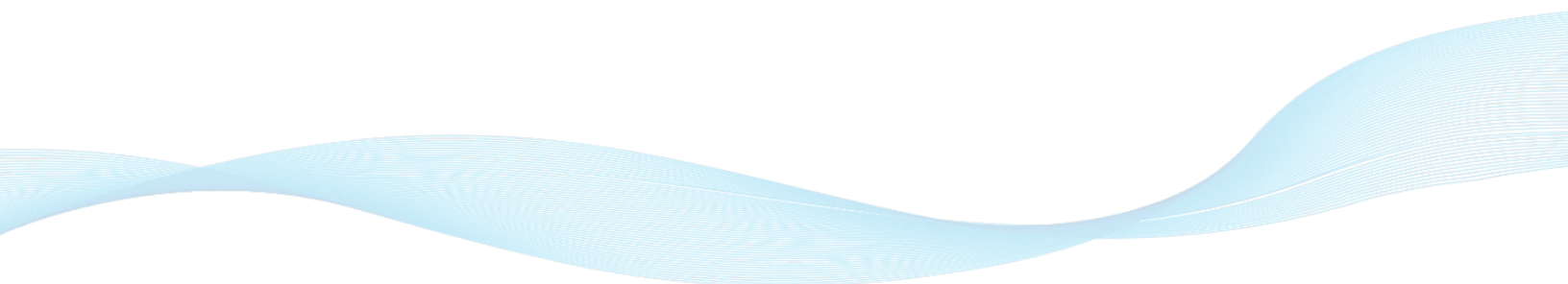
- Assume you have agreement.
- Assume tasks are getting done.
- Commit to a task that you know you will not do.

WORKSHEET: Developing Team Roles

Review the sample below as an example of what roles might look like for your team.

- Are there roles your team wants to add, subtract or combine?
- Brainstorm together what qualities would be a good fit for each role.
- Team members volunteer for each role.

Role	Responsibilities	You would be good for this role if you ...	Interested team member
Team Leader	Coordinate the work of the leadership team. Prepare for meetings. Give support and coaching to the team.		
Recruitment Coordinator	Coordinate, recruit and manage team's volunteers (training, deployment, debriefing, evaluating work of volunteers).		
Communications	Coordinate media posts and produce a monthly update to keep local supporters and volunteers informed and engaged in your coalition.		



Role	Responsibilities	You would be good for this role if you ...	Interested team member
Logistics Coordinator	Lead the team in creating a plan for team actions. Coordinate logistics for team actions. Help generate resources necessary.		
Data Captain	Monitor team's progress toward achieving its stated goals. Create databases for contact information.		
Other Roles?			

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