



Transcript:

Effective Leadership in Your Coalition

Presenter: Carol Oliver
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PRESENTER: Hi, everyone. We're just giving people a couple-- a minute or so to get into the room. And then we will get started right at the top of the hour. OK, welcome, again, to everyone.

Our training today is Effective Coalition Leadership, presented by Carol Oliver. This training today is brought to you by SAMHSA and the Great Lakes PTTC. The Great Lakes PTTC is funded by SAMHSA. And we are funded under this cooperative agreement. The presentation was prepared for the Great Lakes PTTC under the cooperative agreement with SAMHSA. The opinions expressed in this webinar or training are those of the presenter and do not necessarily-- are not necessarily those of DHHS or SAMHSA.

We also wanted to let everyone know that the PTTC uses affirming language. We believe that language matters. Words have power. And the PTTC uses affirming language to promote the application of evidence-based, culturally-informed practices.

Thank you for joining us today. This will be recorded, I apologize, for training purposes, as well as we will put this on the website. If you have any issues, you can send your messages to either Ann Schensky or to Stephanie Behlman or Kristina Spannbauer in the chat.

Certificates of attendance will be sent out in about two weeks. And we will, at the very end, give you a short survey. And we would really appreciate it if you could fill it out for us. Again, technical issues-- you can send those to Kristina Spannbauer or myself. Please follow us on social media.

And our presenter today is Carol Oliver. And I apologize, Carol, I spelled your name wrong. But I will turn it over to you.

CAROL OLIVER: Oh, that's OK.

PRESENTER: I will turn it over to you to introduce yourself.

CAROL OLIVER: Excellent. So it's nice to meet everybody and have the opportunity to get to talk to all of you. And I'm going to share my screen and bring up the slides for today.



So yeah, so my name is Carol Oliver. And the thing to really know about me is I work at Educational Development Center. And I've been doing work in substance abuse prevention since the 1990s.

And in that time, I have had the opportunity to work with coalitions, to initiate coalitions, to oversee people who manage coalitions, both regional and state and some on the national level. And my favorite of all the jobs that I've had is really getting to provide consultations to coalitions, especially coalitions that were going through some growing pains. And so when asked to do this topic, I was thrilled, because I think there's nothing that is as important as coalition leadership. And I also think when I was doing a lot of consulting, it was one of the topics that would come up, was-- is this idea about coalition leadership.

So what are we going to be talking about today? So our agenda is we're going to start with what do we mean by leadership? And different people have different ideas about it. So we want to get all on the same page.

So we want to talk about what's unique about coalition leadership. Coalitions are not nonprofits. They're not for-profits. They're their own kind of organization, and what makes leadership unique within them. We're going to talk about how to build shared leadership within the coalition. And we're going to take a little time and do some solving around challenges that kind of happen when trying to build leadership in a coalition.

My philosophy about doing presentations, and this is why I love the field that I'm in, is I'm both the presenter and I'm a learner. And so in this presentation, I've built in a lot of opportunity for you all to share your different ideas through the annotate feature. And so you'll have the opportunity to share your ideas, your thoughts, all kinds of things with each other and hopefully, whether you're really advanced and you've been doing this work for a long time and you want some ways of describing things, or you're newer to the field and you want some things that you can apply to what you're doing, I'm hoping that there's something in this for everybody. And I really encourage your participation. And I want to learn from you as well as you're learning from me.

So let's start with what do we mean when we talk about leadership? So we're going to practice the annotate tool. So at the very top of the black screen, you're going to see this annotate button. And in the annotate button that you're going to see is you'll see the text.

And what you can do is draw anywhere on this box. So you can spread yourself out. And tell me, when you're thinking about leadership, tell me a word or even an image that comes to your mind. So when you hear the word leadership, what do you think about? And what is it that-- what is it that comes to your mind?



Let's see-- serve, ooh, I love that, to serve comes to your mind. That's great. Anybody-- ah, let's see, I just need to move this. Helping, communication, serving-- excellent.

I'm going to see what's coming up here-- vision, listening, guiding I think. This is kind of fun. It's sort of like the which vowel would you like? Patient, teamwork-- excellent, these are great. So all of these-- inspiring, progress-- all right, these are wonderful. And we'll see how they come up when we start defining what we mean when we're talking about-- when we're talking about leadership.

So let me just-- I'm going to erase these. Inspiring, strong-- yeah, that's interesting. Listening-- people really like the idea of listening. So we're going to-- let's see, inspiring people like. This is great.

All right, so I'm going to erase this. Hopefully I can do that for these. Let's see. There we go. And we're going to move on to the next one.

OK, so here's-- now, there's lots of information out there when it comes to leadership. Here's some things that really caught my eye, that I thought were really interesting. The art of motivating people to act towards achieving a common goal-- and what I love in this is the idea of art and motivating, inspiring others to act while directing them to act in a particular way, and the idea of inspiring.

Knowing the best use of resources at the organization's disposal-- these are all different aspects of when we're talking about leadership. And then directing the activities of many people, of others for good-- and so these are all parts that go into leadership. And I'm sure if we went on the internet right now, we could find a lot of others. But these sort of get us started.

And some of these words you had, right? I think I saw motivating. Inspiring was in there. I thought that was really great. So we're going to move on.

So the other thing that's really helpful to look at is what's the difference between management versus leadership? And if we were to create sort of two concentric circles, there would probably be a piece that was overlapping between management and leadership. They have some things in common. But they are slightly different.

So management is really when you are controlling a group of people in order to accomplish a set of goals. And controlling means you have been given some type of authority over those people. And they are doing what you're asking them to do because you've been put into that role of authority.

Leadership is really about someone's ability to influence, motivate, and enable other people to contribute to the organization's success. And leadership, sometimes that person may be given the power. And sometimes, that person



may just lead through influence, that they haven't necessarily been given the power, so management versus leadership. So we're going to dig a little bit deeper into these.

So first, a difference between these two is counting value versus creating value. So counting value is this idea of accountability. Did I meet my revenue goals? Did we achieve the amount of training that we were supposed to?

Creating value is what do I want to accomplish? Where do we want to go? What do we want to be different in a year than what it is now?

Circles of power-- circles of power, you can have-- and again, circle of power is because it was in the organizational chart, and in my organization, I am a senior manager and I am with other senior managers, that is a circle of power. But there's also this idea of a circle of influence, that you and I may be on equal footing. And I influence you and you influence me.

I have a colleague. And she was put in charge of very important projects. And she had people who were above her and people who were below her and people who were at her level.

And what she had to learn to do was to manage the projects through influence, because no one reported to her. And she, at times, had to get people to do difficult things. And the way she did that was the leadership style of influence, of buy-in, of sharing leadership with people.

And then there's the managing the work versus leading people. And again, managing the work, it's a really important piece. And this is the thing-- management is key and really important. And there are aspects of it in leadership. But leadership is different.

So managing work can be what's the timelines? What are the deadlines? How are we getting this done?

Leading people can be where do we want to go? How do we want to go? How do we want to get there? How are we going to be structured? How do we solve this problem? How do we innovate?

So before I continue, and, of course, this is anonymous, because I can't see you and I don't know who writes what, is looking at management versus leadership. And you can either use the annotate symbol or you can use annotate and you can circle. Which one of these do you gravitate to naturally more, more to management or more to leadership? And you can just-- you can just circle or star it at the very top. So management versus leadership, which one do you gravitate towards?



All right, we've got people on both. Creating value-- ooh, I love the fact that you circled that. Really the leadership, probably, OK, some people management.

And I think this is the piece-- whenever we're talking about leadership or management, there is a piece about what we all uniquely bring to the table. So people like the circle of influence, leading people, creating value. Managing, some people relate to managing the work.

Yeah, and we all bring our own unique personality, learning, thinking traits to whatever we're doing. And oftentimes, we may gravitate towards one or the other. But it doesn't mean that we can't learn to do the other.

So if I'm good at leading but less good at managing, then I can learn to manage. If I'm better at managing than I am at leading, then I can always learn to do the leadership piece. Both are essential. But it's important to sort of know the difference between them.

So it looks like we got a lot of people liking the leadership. And different kinds of people like each one of these-- the creating values, the circles of influencing, and the leading. It sounds like that resonates with people.

But we also have a lot of really good managers. And I have to say, if you had a group and you had all leaders and no managers, it wouldn't work and vice versa. So you sort of need both to function well. OK, so we're going to clear that. I'm going to ask my lovely-- thank you so very much, circles of power.

All right, so leadership styles-- so what's interesting about this, too, is there are different kinds of leadership styles. And I could have gone in and found a different set of leadership styles. I chose these four because I thought all of them are applicable to the work that we do in different kinds of ways. And I think it's helpful in getting to understand ourselves, what we gravitate to, and how the different styles work and the pluses and minuses of each.

So to start, where I want to start is these are different leaders. And I want to know who resonates with you. So we've got Michelle Obama and Ruth Bader Ginsburg. And we've got Bill Gates and Martha Stewart and Martin Luther King and John McCain.

Who resonates with you among these leaders? And if somebody, if you have somebody else you want to write in, you can feel free to do that, too. Who resonates with you? We've a lot of Michelle Obama, Bill Gates. That's great.

And when we think about all these leaders, all of these leaders are slightly different from each other, right? You wouldn't say that they all have the same kind of leadership style. All right. That's great.



Anybody want to write-- write in anybody else who's not here that is the leadership style that really resonates with you when you think of leadership? It's somebody that resonates with you. And feel free to write it in a text if you want. All right, we've got Michelle Obama and Ruth Bader and Martin Luther King being very, very popular.

All right. What's interesting is I've done this activity. And in each one, different people sort of pop up as the ones that people really like. So that's great. So we're going to erase that. And we're going to move on to the next one.

So the leadership styles that we're going to take a look at are a couple. So we've got transformational leadership, democratic leadership, laissez faire, and autocratic. And on the left axis, you see that the one closer to the top are more people-emphasis. And the ones towards the bottom are more task-emphasis, getting things done.

And so we're going to go through each one of these. So first, so an autocratic leader is kind of what it sounds like. The decision really rests with the autocrat-- with the leader. And they don't get a lot of input from others, from their subordinates in making their decisions. And so one of the leaders who is known to be this way is Martha Stewart, who is president of Martha Stewart Enterprises.

And so the advantage of having an autocratic leadership style is that in certain circumstances, if I had a ship and it was going down, I would want a leader that didn't get a lot of input if they really knew what they were doing to make the decision to save the ship. So in certain circumstances-- in certain circumstances, when something really needs to get done-- a business is failing or you have a project that has to get done and meet a deadline, there are a lot of things are on the line and things have to happen quickly-- sometimes an autocratic leadership style is good leadership style to really get things done.

The other thing is for people who are working with that autocratic leader, there's sometimes a feeling of relief. Like I don't have to worry about it, because they're making all the decisions. So those are the positives.

The negative part about it is you can also have it so that you're not really fostering innovation, because people are not sharing their ideas because they won't be taken necessarily. And so what you end up having is sometimes you end up having-- if you really want to foster innovation in an organization, you want to sort of foster new ideas, it's much harder to get that done with an autocratic leader. The other part is sometimes, when you are-- there is change and an organization needs to be nimble and to be paying attention to what's going on, if you only have one person at the top making the decisions, there may be lost opportunities that happen.



And so this leadership has its pluses and its minuses. But it really kind of works best in certain circumstances where decisions really have to be made quite quickly. So that's the autocratic leadership style.

The next one is the democratic. So this one is the fact that leadership and decision making is shared across the chain. And what is needed by the leader in this is to really build the team so that they can have discussions and they can make the decision together. This is a Democratic style. And the person who has this style is the co-founder of Google.

Now, people really like working under this style. And people feel really empowered. It's kind of the opposite of autocratic. If I have ideas, I can bring them to the table and I know that they can be listened to. And I can be a part of whatever the solution is.

And so oftentimes, if you want to create a team environment, a democratic leadership style can be really, really helpful. People feel empowered. They feel a part of something. The drawback with Democratic leadership styles is sometimes the decision making is too slow because it's so focused on the entire team.

So I worked on a project and we were a small regional project. And we got a grant and we became a national project. And when we were a much smaller regional project, decision making was really done in this democratic manner.

As we, in the startup of taking over this much larger project, we really-- we had decisions coming at us like fire hoses. And we just didn't have the time to do the same process. We needed something. We needed people to really take on making decisions themselves or we would have never been able to start the project up.

And we really had to think of shifting leadership styles, because the democratic leadership in startup was one that was not going to work for us. Over time, it did turn into a democratic leadership style once sort of all the startup pieces happened. That's kind of an example of the drawbacks of democratic leadership style.

Next one, transformational leaders-- so this is people who really model their behavior. And they model the behavior they expect to see. They set clear goals. And they set expectations both for themselves and others.

And this is about people who are able to promote a compelling vision and values in which they can live and work by. It sounds like people really like this one. So those are transformative leaders.

And so one of the transformative leaders that I'm sure you're aware of is Barack Obama. And it was interesting, I was watching the news last night, and I think he had a speech that he was giving. And one of the people



interviewed afterwards, just somebody who was watching the speech said, you know, I wasn't really motivated by our current candidates, but I feel really motivated after listening to this speech. And I think it's his style, it's that transformational leadership that assists.

So the positives of this is it really buys people in. And it's particularly good when you're trying to get a mission and a vision and you're trying to inspire people to come to the table. One of the drawbacks is in order to be able to do that, you really have to have a lot of trust built in. And sometimes in the startup of a project, you haven't built that trust yet. And so there's this balancing act between trying to inspire people while building trust with those people.

The other thing that can happen with transformational leaders is you really have to pair a transformational leader with somebody who's a good attention to detail, somebody who's really, really good at operations. And the reason is because they may not be paying attention-- they're looking at the forest, but they're not seeing the trees. And a good example of this, I worked in a company and we had a gentleman who was the head of operations. And he was the numbers guy. He was the guy who said yae, nay. People were actually scared of him.

And the president left. And he took on the presidency. And his job had to shift, because the president was about inspiring staff and inspiring partners and showing a vision for the future and having the humanity of the organization show. And he really had to make a shift in his whole approach to work and leadership, which he was eventually able to do, because the management had to be some-- the leadership was a different kind of leadership that needed to inspire people.

So the last one, which is sort of interesting, if we could clear some of these-- people really like the transformational leadership. So this is a very different form of leadership, where instead of-- what the leadership does is really create self-directed change. And so this is a hands-off type of leadership. Some people think of it as what is the leadership, leader doing?

And the key to this is building really, really strong teams. And in management lingo, there is something called a self-directed team, where you really have the members sort of making decisions and running things. And the person at the top is just sort of seeing that all of that is happening and helping to steer it along the way.

And an example of this is Warren Buffett, who is a big business tycoon. So the positive of this is if you have people with strong leadership skills, if you have people who want to be the self-directed team, this can be a very successful model. At the same time, the drawbacks are you have to make sure that the timing and people are ready for this.



People can end up feeling like all the work is on them. They can feel the stress of it. They can feel unsupported because the people who are at the top don't seem to be sharing the burden of the work. So one of the drawbacks of this that has to be countered is making sure that you're not burning out the self-directed teams, that they have what they need to be very, very successful. OK.

So that brings us to you all. So tell me this, which-- and you can see these styles-- which of these styles do you prefer to work with? What do you prefer? If you had to pick some colleagues that you were going to work whether you had to pick a boss, what would you want?

All right, Democratic and transformative. Laissez faire, interesting. All right. Laissez faire, transformational-- we don't have anybody who wants autocratic, interesting. All right, and so I'm going to ask-- I'm going to have you-- oh, a lot of democratic-- I'm going to have a stop and I'm going to ask to have it cleared for a minute, because I'm going to ask a different question.

So my next question is which leadership style do you use the most? So what do you use the most when you're doing your work? Transformational-- oh, again, transformational and democratic.

Now, it's interesting, I wonder if we were in the field-- some autocratic-- I wonder if we were in the field of business or if we were talking to a financial firm if we would get different answers than this. I have no idea. I'm just raising the question in reference to it. So we got some autocratic that people like. We've got some democratic and a little less laissez faire.

It's interesting, so it sounds like people use autocratic, but people less like to work with autocratic. That's just sort of an interesting observation. Let's see. All right, we're going to clear this as well. All right, thank you, everybody, for participating, because it really makes it interesting to see how you interact with this and your sort of opinions and thoughts and things.

So we've talked now about sort of leadership in general, getting sort of a better understanding of the types of leadership, what qualities, how it's different than management. And now we kind of need to look at coalition leadership. And so what makes a coalition unique?

So some of the things-- and you can add some other things in here if you'd like. You can add them to the slide. One is there is this dynamic of paid staff and member volunteers. So paid staff, either they're getting their money through the coalition or I'm paid to go because I'm part of the police department, the school department.

Or I'm a member volunteer. I'm representing parents. Or I'm representing athletes and I'm a partisan. So you have this dynamic where you have people



who are coming at this from different perspectives as far as what's motivating them to be there.

The motivation is also based on the collective purpose and goal, especially if I'm not being paid. For non-paid coalitions, people are not sitting there because they're getting a paycheck. They're sitting there because they believe that we are accomplishing something and accomplishing something together.

It also, it can be that I'm motivated by what we're achieving together. But I'm also motivated by what's in it for me? Both what's in it for me for my organization and what's in it for me as far as me as an individual?

The other part is that what we find is that leadership evolves over time, both with staff and members. Anybody want to add anything else to this? And you can feel free to write it if you'd like, anything else that makes coalitions different and unique.

All right. I'm going to-- OK, I'm going to move on. Oh, thank you, the art of the pitch. Oh, that's fantastic, great. So the art of the pitch becomes really important when you're probably convincing people about wanting to be part of the coalition, right? It's about helping them figure out what's in it for them and why they should join.

12 sectors of the coalition make it unique, the fact that you need all 12, and the different sectors, so the fact that you're representing the community. That's great. What are other things? I think that says, if I'm right, diversity. Diversity, excellent, so you need diversity. Collaboration is something that makes it unique.

Yeah, you can have a different organization and you don't necessarily need to have collaboration. I think that's very, very true. Any others that make it unique? All right. Those are great. So I'm going to ask to have those cleared.

And so here's another question. We're going to go back to these styles. If you are a paid staff of a coalition, which leadership style would you select to use with a coalition?

So you're a paid staff. So you can think of yourself as a staff person or you can think of yourself as the coalition coordinator. Which one would you use? So people have democratic and transformative.

Transformative, some people said laissez faire. One person said laissez faire. OK. Two people laissez faire.

Depends-- that is a fabulous answer. It depends, right. It depends because the different type of leadership you use is going to depend on where the coalition is. That's great. So if we can clear this. OK. All right.



So this is one of my favorite-- I learned this a long time ago. I have to say, I learned this more in the beginning of my career. But I've always thought it was so helpful in understanding sort of this dynamic with coalitions, between staff or an organization beginning a coalition and wanting to build coalitions within the coalition itself.

So what we find is for the-- for the prevention specialist or the coalition coordinator or the organization that is founding it, whoever that is, because coalitions happen in different ways, we start out with the leadership. We're setting the agendas. We're making the decisions.

But over time, we're hoping-- whoops, let me go back a second. Over time, we're hoping that the coalition, the community has greater leadership and the coalition has greater leadership over time. And so this is what it depends on. Depending on where we are in this dynamic, we may use different leadership styles.

So I'll give you an example. So in the beginning-- and, again, this could look different depending on who it was. What I'm saying is it's not the way it has to be.

So it could be that in the beginning, we have a transformative leadership style because we want to motivate people to be a part of this and be able to see the vision of where we're going. We might, then, move into a democratic leadership style, where everyone is sharing and having part of the what's going on and in consensus. And eventually, we could decide to do a laissez faire, where the teams are really running itself and the coalition is really running itself. It doesn't have to be this way. But this provides you with an example of leadership style should change over time.

And I have to say, when I was brought in often to work with a coalition, sometimes what I observed was that there was a difference between where the coalition was and the kind of leadership they were-- they were in and the kind of leadership that they were getting from whoever was running the coalition. And there was a little bit of a mismatch. There was a little bit of a tension there, where the person may have had a little bit more of a autocratic leadership style and the group was wanting more of a democratic leadership style and they were having tensions in trying to figure out what was going on. And so leadership is important to know that it can trans-- it can transfer over time.

So another way of thinking about this-- and I've used this particular piece when I've worked with coalitions themselves to say kind of where are we in this dynamic? Where do you think we are? Where do you think the staff is or the people who organized it? And where do we think the coalition is?

The other thing, and this is really helpful, too, is this also illustrates that leadership and the organizational components change over time. So for the



distribution of work, in the beginning, the staff may be doing most of the work. They're going to be setting the agendas and pulling together materials and figuring out people's calendars and chairing the meeting.

It doesn't have to be that way. Sometimes, coalitions begin with two sort of co-chairs that are volunteers that begin it and then the staff works with them. But what we find is there's probably more work getting done by the people who are organizing it. Early stage is the work begins to be shared within coalition members. And then experienced coalitions, the coalitions members do more of the work and the staff is more supportive.

And so the other thing you can do is find out, where is my coalition in this? Are we more in the beginning? Are we more in the middle?

Are we more inexperienced? Sometimes you've got an experienced coalition. And due to the fact that a lot of members left, all of a sudden, what you find is you're sort of back in a new early-stage coalition. And you have to change the way the work dynamic is going because you don't have the membership you have. You're actually kind of taking a step back.

Roles and responsibilities-- again, so the staff takes the setting of the agenda. In the early stages, there can be informal roles that are established for the membership. And then over time, leadership develops and you get more defined roles.

One of my observations when-- oh well, I'm going to-- one of my observations sometimes is in the process, between staff or the people who are organizing the coalition, their having leadership and the participants or the coalition members having leadership, there can be a little bit of a tension, because it may be that the staff wants the coalition to take more leadership than what their leadership is at that particular time. Or it may be that the coalition wants more leadership before it's been given more leadership. So again, it is it's like cooking. There are these dynamics that go into it.

So tell me this, so for coalitions that you're working with at the top, are you tending to work with new coalitions, early-stage coalitions, or experienced coalitions? What kind of does that look like for our audience? Let's see, experienced. Yep, we've got a little bit of everything.

Now, one of the things for people who are in new or early-stage coalitions is when I would work with coalitions, the other thing I would observe is without somebody telling you that different coalitions at different phases work differently, I would find staff that was in a new or early-stage coalition would have the expectation that the coalition was going to act like an experienced coalition. And they would get frustrated, especially when they would talk to their colleagues who were working with experienced coalitions. And so it's really important to remember, especially if you're doing peer networking, if you want to get a sense of what's going on, talk to somebody who has a coalition



in a stage similar to yours. And you'll get a real sense of what should be going on with your coalition.

If you want to get a sense of where can we go and how can we get there, then an experienced coalition can be really helpful in telling you that. But it's really important to have the expectations that meet sort of where your coalition is so you don't get frustrated. All right, so it's spread out across. All right, let's see. OK, so we're going to erase that.

So this is about building memberships' leadership capacity. So we talk about the staff capacity and what that looks like. And now the real thing that we all want to do is sort of how do we build that shared leadership? How do we go about doing that?

So we looked at this before. So one of the things to note is in this time span between the fact that I'm going less in leadership from staff and more in leadership from the community coalition, this is where the shared leadership is being built. And it really helps for it to be intentional. And so that's the time frame that that's happening in.

So shared leadership-- and this is a really simple definition, but I like it, because it really says when two or more people are engaged in leadership with a team and they want to influence and direct the members to maximize what's going on, then you're really in shared leadership. An example-- I work for a boss who has a very shared leadership style. And what that means is that when we would do planning, and I do a lot of planning in my work, I could say I have an idea of how we could do the planning process. And I could take the group through it.

And she'd say that sounds great. That sounds great. Why don't you do that? Somebody else could step up to the plate with whatever talent they had and she'd say that sounds great, why don't we do that?

There was space for people to be able to share their expertise and ideas. And they would be listened to. And so there was shared leadership across the entire group. And what you were able to do is you sort of got a bigger bang for your buck because you got all of the resources across all of those people. So that's really shared leadership.

So the difference between traditional leadership and shared leadership-- power comes from the authority. And if you think about management as well, in management, the power sort of came from the authority. In shared leadership, the power is greatest in collective teams. And so the team itself has a leadership within itself.

Maintain ownership of information-- this is really, really huge. So one of the strategies that I have found for people to retain power is to maintain the ownership of the information. And so you're not able to-- you're not able to



navigate and be proactive because you're not sitting on all the information. And it's a way that some people own power.

But in shared leadership, it's really that open-- there's an open, openly share of information across what's going on. So people can be proactive and have an understanding of the whole and what's going on. And I think the information piece is huge. I have, in time when I was working with coalitions, gone into a coalition and found that one or two people sitting on information was one of the problems that the coalition was having, that they didn't have an open share of information, so it was hard to have shared leadership.

Deliver the solution to the team, facilitate team problem solving. And this was something else that I also found, too, is that oftentimes, whoever was bringing me in would say I know what the problem is and this is what you need to get the group to do, rather than facilitating a process where the group could help define what was going on from their perspective and there could be a group problem solving about it, because when you deliver a solution for the team, the team is not going to own the answer. And they're not going to own implementing it, compared to being able to have the team define the problem.

I often think that a lot of coalition facilitating and planning is really helping group-- do group team building and problem solving-- being able to put the information out collectively, have people make decisions and conclusions, and then move forward. And that's a lot of what good facilitation is. And so these three are really, really key ingredients to have shared leadership.

Now, here's the thing that comes into this, is that depending on my style, this may be more or less comfortable to me. So in having shared leadership, if you're somebody who are more comfortable with power coming from authority, having people around you who are comfortable with working with teams and collecting teams can be very helpful to have that vantage point as well. And so it's not that traditional leadership, there's anything wrong with it. In fact, in many respects, it's really good.

But if you're in a coalition setting, you really want to be trying to build a shared leadership. And these are some key pieces to be able to do that. OK, let's move on.

So here's my question to you. So you can either do this as your coalition or you can do it-- and if you don't, aren't part of a coalition, you can do it as part of your organization. Where do you find yourselves in the leadership, between traditional is on the left and shared is on the right, where do you-- where do you find yourself in the shared versus traditional? All right.

Somebody said they're not sure. Some people are right in the middle. Excellent. So there's a continuum.



And I think that goes to show two things. One, there's a lot of ways of doing things, right? And things evolve, right? And I wonder for some people who are in shared leadership, if we went back five years ago, would it have had been different in the lifespan?

So this is great. Thank you, thank you for participating. This is really helpful. So I'm going to ask to clear that.

And OK. So here's some keys-- creating and communicating a vision is really important. Where are we going, how are we going, and why are we going is really, really important, especially when you're talking about shared leadership. And it's also important that people create the collective vision.

So one of the things that happens in coalitions with new membership is the group has been together for a long time. And people now want to expand the membership. And as we expand the membership, we bring in new people. But those people need to actually understand the vision and see what the vision has to do with them. You almost, in bringing in new membership, have to kind of step back a little bit and give room to the people who are joining to be able to come to terms and understand what the vision is so that they can be a part of it.

Willingness to challenge the status quo-- so that if it's not broken, don't-- don't change it. So in shared leadership, people need to have the space to be able to say, you know, we've been doing it this way. We've been doing these kind of events for a long time. I'm wondering what's the goal of them and should we be doing a different strategy?

Or I'm wondering-- we've had the same people on the steering committee for 10 years. I'm wondering if we need to rethink who is on this committee and we need to think about how we do things. So in shared leadership, there has to be room for people to challenge the status quo, enabling others to act and encouraging other people to act, and modeling the desired behavior, which, again, it kind of goes back to that transformational. So if I want to have shared leadership within the coalition, then if I'm a staff person, I have to sort of role model that I'm going to share the information and I'm going to have group decision making and have other people who are involved in the decisions that get made, so modeling the behavior as well.

OK, any questions on any of that? Let's see, any question or anything that maybe anyone wants to add? All right. We're going to move on. So I like this quote because I think it really gets to this idea of it's not about kind of you having the power in what you say, so not the cry, but the flight of a wild duck leads the flock-- leads the flock to fly and follow.

And I really like this saying, because I think it's a nice way of thinking about what shared leadership looks like. You have to role model shared leadership in order to be able to instill it within a group. And that's really true.



OK, so the question becomes how do we foster this? How do we foster shared leadership? And so one thing that we can do is to create a safe environment.

So many years ago, when I was learning about coalitions, I worked with a trainer who was very experiential. She had us do a lot of activities. And one activity she had us do is she had several people leave the room. And they were going to come back. And what they were supposed to do is to get into the circle.

And the first time they did it, everybody was standing ranks not to let them in. And then the second time they did it, people sort of let them in. And it was a really great reminder of closed groups versus open groups.

And sometimes, when we are expanding our membership or we want people to take on roles, we have to make sure that we're being really open. We're not talking in lingo. Whoops. Sorry, we're not-- we're not talking in lingo, that people feel like they can be a part of the group, that there's not gossip within the group, and that people feel like I can come to the group, I can be myself, and I can feel safe.

The best way to describe an unsafe environment is I'm sure all of you have been a part of a group and you felt really unsafe at some point. And I think the thing to do is-- one of the really great activities to figuring out how safe you are is to brainstorm that list collectively. When did we feel unsafe? What was that like? And are we doing those things to make people feel safe in our group?

OK, the other one is fostering shared leadership is developing multiple avenues for participation. So one of the things that can happen sometimes with a coalition is the way membership happens is it's very static. You're a coalition member when you attend the meeting.

But not everybody can attend the meeting. And people may want to be a part of your mission. And they may want to be a part of this. And they may want to sort of take part in what happens, but there's not avenues to do it.

So one way is to create, for non-coalition members, volunteer opportunities. Some of the organizations that I volunteer with is I'm not on a board. I'm not a member. But I will volunteer to do anything for that organization.

The historical society in the town that I live in does-- has a special historical house tour. And every year, I've always volunteered to do that. And I support it. And I have a sense of what the historical society is doing. I feel connected to it, but I don't necessarily have to be a member.

Networking and stakeholder and other organizations outside also, having them feel like they're part of your organization and that they-- that you are



open to sharing your vision. And they can actually help support your vision, even though they may not be a member. So fostering different kinds of ways of participating can actually create shared leadership sort of in the community, as well as in the coalition itself. OK.

So setting members up for success, so ensuring a clear understanding of roles. So I don't know, this happens to me quite a bit sometimes, is that I go to a group. Sometimes it can just be a meeting I'm supposed to attend.

And I'm not sure what I'm supposed to do. Do you want my input? Are we making a decision? Do you just want to inform me of what's going on? And I don't speak up, because I don't know what I'm supposed-- I don't know what you want from me, so making their role really clear in expectations.

And one way to do this is really easy, through agendas. So when you're doing an agenda, saying is it a decision-making agenda? Is it a brainstorming agenda item? Is it an informing agenda item, so that the participants who are sitting in that meeting have an understanding of what it is that you want from them. And then they can more aptly be able to kind of fit into the way in which you're structuring the meeting.

Develop opportunities for building skill-- so not everybody's used to being a part of a coalition, nor substance abuse prevention. This is a lot of what we do in prevention, is capacity building and skill building. And I think this is true as well.

Respecting people's time limitations and other priorities-- so we've all been in situations when somebody has voluntold us. And I think for coalitions, voluntolding is very dangerous, because if I feel like you're thrusting something on me, I may not tell you, but I'm going to be uncomfortable. And I may only say in that role for a short amount of time.

And this is where the dynamic between wanting members to take responsibility and letting the staff-- have them take responsibility and forcing people to take responsibility, there's a piece there. And there is an art to being able to build that shared leadership. But we have to be careful if we overstep and we are sort of forcing people to take on roles that they may not be willing take, or not forcing, or even trying to guilt them into taking the roles that they may not be able to take.

Recognizing effort, which is something that happens in all coalitions, and there's so many different ways of doing that. I know coalitions that have awards ceremonies once a year. I know people who have people, and they are constantly sending out like appreciation affirmation messages to people who are on committees. And the last one is build opportunities for fun, because people will continue in anything that's fun. And so that's another piece.



And a lot of these are not rocket science. A lot of these things are things you already do, you know to do. But they also help in the piece about shared leadership. OK, questions or-- on this? All right.

So this is one of my all-time very favorite pieces that I've learned in coalition development. And this is around group dynamics. So this is called the Drexler Sibbet model. I didn't invent it. It's invented by two people called Drexler and Sibbet. It's a business organizational model. But I think it's really great for understanding of the group dynamics.

So when somebody comes into a group, everybody goes through the why am I here? Who are you? What are we doing? That's the orientation, trust building, and goal clarification, right? And when you think about early-stage coalitions, this is kind of the part that they're doing. We're collectively trying to figure these things out.

If I want to get shared leadership, I've really got to kind of wait until somebody is like OK, how will we do it? I may not be able to actually have them own being a part of the group until they know why they're here and who they are and what we all are doing. And then on the other side of that is who does what, wow, and why continue? And you can see on this side, it's a lot easier to get shared leadership, because you've got the buy-in.

Another way of thinking of this is you sort of got the forming stage in the orientation. And the trust building was forming. And then you've got the performing over here in the green area.

So I like this because you can actually pick any group you're a part of and you can say where are we on this? And that can really help you in understanding shared leadership. If I'm developing shared leadership and I'm in orientation, it may be that I need six people and having more leadership than the group.

[DISTORTED AUDIO]

Hello? Hello?

PRESENTER: I think you're OK, Carol. That might have just been someone else. So I think they muted themselves again.

CAROL OLIVER: Oh, OK, great. So this model, again, can be really helpful in helping to shape our expectations about leadership. And I think that's part of the piece about what to expect when. And I can expect that it's going to be a lot easier to build shared leadership on the commitment side than it is on the orientation and trust.

But to build-- to build the shared leadership, understanding and doing a really good job on the orientation, trust building, and goal clarification, that can really set up a lot of success around promoting shared leadership, because I



understand why we're here. I felt a part of being able to describe it, to be able to form it. And now, I'm feeling really connected to the group and I want to be a part of this. So the group dynamics is really helpful.

And I particularly love this tool, because when I've worked with coalitions in the past, this as the outside consultant always yielded me a lot of understanding about where the group was and what the dynamics are. You can also teach your coalition group about this. And they can themselves see where they are.

Sometimes, what happens is we're in high performance. Something happens and we go back to goal clarification. Why are we here and what worked? You accomplish everything that you set out. And you're now in growing pains and you're deciding where do we want to go next, you're going to go back to goal clarification. And that's absolutely fine.

OK, so here are the ones that I talked about-- create a safe environment, developing multiple avenues for participation, set up membership for success, monitor organizational process. So identify a strategy that you are currently using. Are you using any of these currently? Developing mult-- setting up members for success, create the environment-- excellent. A lot of them-- that's great. And

If you're really experienced and found this content that I know this, what I would say is take the slides and what I presented. And it's something that you can always use with your own coalition and building their understanding and capacity about shared leadership and group dynamics. That's great. So I'm going to clear the screen.

So now this is your turn, right? This is what additional strategy do you guys use to promote shared leadership? What is it that you do?

I'm going to give you a minute to think about it. What do you do to promote shared leadership? Work groups and committees-- excellent. You provide some structure for the group, yep. Engage coalition members in the work, have coalition members serve as a work group members and facilitators-- yeah, that's a really great one, sort of the way in which you set up operations for your working group.

So sometimes, people do rotating facilitators or people have different jobs in the group. Ask others' opinions. Care about people as people as well as in the group. Develop agendas with chair and co-chairs. I'm going to-- let's see if I can move-- whoops, I didn't mean to do that. Sorry.

Work groups, ask other opinions-- all right. Make members feel included, coalition environment-- oh, articulate outcomes clearly, right? What are we all working for? Where are we going to go? And how do we know if we're going to get there?



Give them an action for the next meeting-- excellent. These are all great. Assess need, come up with goals, and ask members to brainstorm, then give them ownership of it, exactly. Constant-- constantly-- so I think what you're saying is you're constantly together, this idea that we're constantly doing share leadership and we're working together. Follow-- ooh, I love that. So you're not just leading, you're following. Explain my focus areas-- great.

The other one that's not here that I think is really important, too, is providing context. One of the things I find sometimes in meetings that I'm a part of, whether coalition or otherwise, is that people will start talking about something. And they haven't laid the context for everybody in the room. And if you're not on the inside group, if you're not part of the steering committee, and let's say this is a general group, then you don't have the context for what's going on. And you may actually begin to feel like an outsider. I'm not part of in-crowd. Assessing the needs together-- yep, that's great.

So one of the things about shared leadership and leadership in coalitions is it's not one thing. It's a lot of different things that you do, a lot of different small things that all add up to being able to do shared leadership. And it's also understanding sort of where the dynamics of the group are, what stage of development the group is, and what you can expect of the group between where they are in developing their leadership and where you may be in sort of shifting away from having leadership and their having more leadership.

And again, it's like cooking a recipe. You've got to taste the recipe to see what that's like. OK. Great answers. These are fabulous, excellent. OK.

So I want to talk a little bit about challenge-- oh, what problems are-- asking what problems are you having. OK, so leadership challenge and solutions-- so I just picked two. We could pick others. But I want to give the sense-- and part of this is sort of applying what you know from your personal life. Part of it can be applying what you've learned in this particular training.

One of the particular problems that I used to run into quite a lot is how do I get the working groups to take leadership? How do I either get membership or how do I build leadership in the working group? It feels like the staff is still running this group.

So when I'm moving from sort of that place that where I'm sort of-- the staff is running things, and I want the group to be able to take it on, it's almost like magic happens. And so my question to you is how do you do that? Are there any tricks or tools that people have that they use when they're trying to-- so not sure, yep. It's hard. Meeting with-- let me just make sure I can see this-- meeting with chair before the meeting, making them share, yup.

The other thing, too, is-- so here's the other thing, too, is one of the big things-- and brainstorm among the whole group, make the chair have-- empower them. The other really basic thing to start with, too, is to make sure that they



understand what their role is. Sometimes, people volunteer or they don't volunteer, again, because how long am I going to be in this?

If I volunteer, will I get more work than I'm expecting to get? Will I have to work nights and weekends? What is your expectations of me? And will I not be able to meet them?

So I think one of the piece is really being clear about what's involved and using your staff to be able to do things that the person that you want to do the leadership may not be able to do. Talk to them ahead of time. Encourage them.

The other thing, too, is give some time in-- give some time in helping people come to the conclusion. I had a friend who was a Cub Scout leader. And he was planning on transferring the Cub Scout to another leader. And he wasn't getting any volunteers.

So he started talking about it six months before this was supposed to happen. And then he kept on mentioning it. And then he would talk about it. And slowly but surely, two people finally volunteered. But he gave them enough time to sort of think about it.

Let groups decide their leadership style first-- that's great. How do you want this group to function? And how do you want it to lead? Do you want sometimes it's about-- do we want to have two leaders? Do we want to rotate leadership? Exactly.

Brainstorming-- yeah, these are all great, great things. And one of the things to think about is to find out what are the challenges that people are experiencing that is keeping them from volunteering? So one of the things the coalitions often do is membership survey to see what people's experience with the coalition is like. And so one of the things that you can do is a membership survey, and include what are sort of challenges for you volunteering or being a part of things so you can get that information. Excellent.

All right, question two-- ooh, no, sorry, that's not what we want. Challenge two-- sorry about that. How do you get the real decision makers at the table?

So this is something else that I have seen happens, is that you may have the police represented, but the person who's sitting at the table is not really the decision maker and they have to go back. So build the group with all, OK. And so how do you get-- how do you make sure that the real decision makers, if they're not at the table, at least that they are engaged? Any ideas that anybody has in reference to this?



Build relationships with individuals. Participate in their events to grow the relationship before you're asked-- great. Networking, referrals, personal in--personal invites always go a really long way. Build the relationships.

What's in it for me always big, right? Lead with the what's in it for me? Utilize members who have connections, follow up. Yeah.

The other thing that I have seen people do, especially when the appetite for a mission is not there-- personal invites. See who knows them. Yes, there are people-- find someone-- let me just get this out of the way. Find someone you can do to benefit them and follow up. This is great. Friends and members who have connections.

There are people-- I'm not one of them, but I work with people who love to do the ask. And I'm sure in your coalition, there are people who are fabulous at doing the asks. And those are the people you want to get to be able to do it, because they're so naturally really, really good at it.

The other thing is-- the other thing, too, is if you can't get them to the table, part of what you may want to do is keep them informed. And so that can happen outside the coalition meeting. So whether it is that you have some of the key stakeholders that you-- are not sitting at your table, but you want to do a breakfast for them, or you want to do a virtual-- you want to do a virtual informing them of what's going on, or you want to engage them in a question in some shape or form, or you want them to come and talk to the group-- so there's lots of ways that you can sort of keep those people on board, those decision makers, as well as all the ideas that people have had here as well. So this is great.

OK. All right. We're going to clear this. OK. So I'm about done with the-- what I have to present to you. And so what we've done thus far is we've talked about leadership and management. We've talked about leadership styles, the fact that leadership is evolving over time. And where the group is can influence your leadership style and how you're building leadership within the group. And we've talked about how shared leadership and how different techniques, that shared leadership can be fostered.

So before I move on to my closing slides, does anybody-- and you can write it in this-- does anybody have any questions that you'd like to throw out? Meet with individuals separately who you think would be great. That's another one, yep. So any questions in general that anybody has before we move on to the closing?

Can I ask the tech person to-- oops, sorry, to separate those two? Is that possible for you? How do we teach teams to disagree? Ah, that's excellent. How do we teach teams to integrate, yeah, successfully?



There is some really great stuff on conflict resolution or handling conflicts in coalitions. And I think that one of the-- one of the keys of a successful coalition is being able to handle conflict in coalitions. So I think that you can have trainings and skill building that comes in to talk about conflict. You can do some protocols and policies about how you all want to handle conflict in the group, how to create a safe space in order to-- in order to be able to have conflicts come up. So those are all things-- that is definitely a skill-building area. And it's also an area that you can sort of develop policy on.

Let's see, someone asked earlier when coalitions need, how can that hap-- oh, so when coalitions need to revitalize. So it's interesting, so revitalisation-- I think when a coalition needs to revitalize, often to me, it says that something is going on in the coalition. It doesn't have to be, but if somebody said my coalition needs to be revitalized, I would first want to kind of what's going on.

And the need to revitalize, maybe because it's a symptom of something going on with the coalition. It could be that the coalition needs to grow, expand its mission. It could be that it's lost members. It could be that it's been doing the same thing over and over again.

So before I decided to revitalize, I think I would want to sort of take stock of where the coalition is, what they're doing, and how they're doing it. And have the coalition sort of see if there's anything behind the need to revitalize. One way of revitalizing is doing annual planning, is to sort of get people together, do a retrospective of kind of what you've done.

There's a virtual technique, which is the virtual history. And it allows people to sort of create their own collective story about the coalition, look at what they've done, And? Then look at where they want to go. And so I think that bringing people together in order to sort of do this "let's see where we've been and where we're going" is a really good way of doing revitalisation.

Ah, toxic board member-- very interesting. Very hard thing to deal with, right, a toxic board member. And there's no right or wrong answer. A lot of this is like trial and error.

So one of the things that I've seen with toxic board members and I've seen with people is that somebody takes the board member aside and has a conversation with the board member. I've seen that somebody actually gives the board member a particular role. They actually have them think through one of the dynamics that they need to improve so they feel like they're a part of it.

One of the things that I find that's a really nice way of telling someone or talking about the fact that somebody is toxic is we have problem identifiers and we have problem solvers. And sometimes, what happens with some board members, they become problem identifiers. And they sort of drag the



group down, because everything, every time ideas are brought up, they're identifying all the problems.

And so one of the ways of dealing with a toxic board member is to sort of lay out some group dynamics. Some ground rules can be really, really helpful, or revisiting the ground rules, talking about group dynamics within the group, and talking about sort of introverts and extroverts and how do we do it so everybody gets to be heard. The more you can sort of create this objective, "we're going to improve our working conditions as a group and we're going to sort of build some ground rules," it can be helpful in sort of taming some of the things that that board member might do. But in some cases, you just have to pull the board member aside.

OK, how to engage coalition members who have Zoom fatigue? Honestly, I would love somebody else to say that, because I think that's really, really hard, right? What do you do with Zoom fatigue? And it can be around scheduling.

It could be doing a phone call rather than a Zoom meeting at times, building in some things that are fun to do that sort of-- but I think no matter what it is, as long as people get fed in some shape or form, the question becomes even though people are in a Zoom meeting, how are we continuing to feed them? So are we giving them the opportunity to just talk about their lives in the beginning or just have time to just check in with people? But I don't really have a great answer for the Zoom fatigue. And definitely, I welcome anybody else's idea of what you can do on that.

All right, so whoops, I keep on doing that and I don't mean to. I'm going to ask the technology people if there's a way I can move some of these apart so I can see some of them better.

PRESENTER: Unfortunately, I don't think there is. But a lot of them are the-- we were all trying so hard to get the toxic board member question clear, and we kept posting them on top of each other. So I think, honestly, that one's on there three or four times.

The one that's hard to read in the upper right I think says how can we engage our coalition members during this virtual season? And I think you probably kind of just answered that a little bit. I'm trying to see if there's any other that I can help read as I was watching them go up.

CAROL OLIVER: But these are great. These are great. And the other thing, too, is so much of this-- so much of this is trial and error. The other thing I've done with toxic board members, the best thing you can do is, depending on the dynamics of your group, is you can bring on other members that-- and I've done this, that actually balance that person's personality out.



And I've actually worked on a coalition where this is something, and I tried many strategies. And that was the particular strategy that worked. So those are some things that you can do as well.

So when it comes to the how do we engage our board members during this time period, well-- so for closing and evaluation, there is-- whoops, can we clear this for a second? Yes. Whoops, sorry, I didn't mean to do that. I need to find-- oh, oh, it's not there. OK, so missing a slide, so I apologize.

So I wanted to let you know that there is another webinar, which is on the 28th. It's part two of this. And a lot of what we're going to talk about in that has to do with engagement. And it has to do with how do I engage people?

And it will cover what are some of the techniques and things that I can do in a virtual pandemic with my coalition? And so those are some of the topics that will be talked about in that particular one. And you'll be getting, I'm assuming, some more information on it. OK.

All right, so I want to thank everyone. Let's see, I saw toxic board member, excellent. So thanks, everybody, for being a part of this. Thank you, too, for participating and putting things in and doing a virtual training kit. For the trainer, it makes it feel like it's much more like I'm with you in person, because I can hear what you're thinking and saying and that sort of thing. So thank you so much.

And I hope you come back for next week's training. And this will also be recorded. So thanks, everybody.

PRESENTER: Thanks, everyone. Have a great day.