



Coalition Annual Report Template Workbook

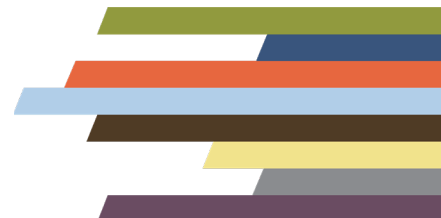
Whether starting a new coalition, or revitalizing and reorganizing a current coalition, it's important to understand the elements of a coalition that will support the coalition's capacity in achieving their anticipated outcomes. Who is sitting around your coalition table? What is their specific role? Is your mission statement representative of the anticipated outcomes? How do we orient our new members, and celebrate all of our members?

This workbook is designed to assist coalitions in organizing their efforts, based upon the Six Elements of Effective Coalitions. The first section of this workbook guides you through examples of organizational structure and elements of coalitions. The Six Elements of Effective Coalitions, **goal-directedness, cohesion, efficiency, opportunities for participation, diverse stakeholders, and new skills**, are mentioned throughout the workbook for consideration while learning ways to organize your coalition. There is even a blank template for your use at the end of this workbook!

Please use this workbook in conjunction with the [Six Elements of Effective Coalitions handout](#), and the supplemental video presentation.



The views expressed in this document do not necessarily represent the views, policies, and positions of the Substance Abuse and Mental Health Services Administration or the U.S. Department of Health and Human Services. This document was developed under a financial assistance award totaling \$600,000 with 100 percent funded by SAMHSA/HHS Cooperative Agreement # H79SP080995. July 2, 2021



Mission Statement

How do you quickly and concisely share your coalition's purpose to a wide range of audiences? The mission statement! The coalition's mission statement helps maintain **goal-directedness**, or remaining focused on achieving the coalition's goal.

Mission statements should be:

- Short and impactful;
- Co-created by coalition members and key leaders;
- Easy to understand; and
- Relevant to long-term.

Our coalition's mission...

To reduce youth substance use by
(what you want to do)

providing evidence-based prevention training so
(how you'll do it)

that youth in this county can lead healthy lives.
(what impact you hope to make)

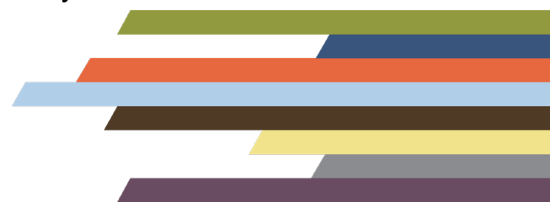
Consistent and Purposeful Meetings

Consistent and purposeful meetings are vital to coalition member engagement and **efficiency**, or the best use of time and resources. Meetings should be timely, well-organized, purposeful, and offer members with a sense of **cohesion** and **opportunities for participation**.

Ask yourself and coalition members the following questions when determining meeting details:

- What is the purpose of meeting?
- What time of day and time of week works best for most members?
- How can coalition members assist in planning, or meeting execution?

Keep in mind that it is always difficult to get a diverse group together. Try to accommodate as best you can, but understand that one time may not work for all



members. Try alternating days of the week, time of day, or either alternating, or combining in-person and virtual options to maximize participation. Also, be sure to open the meeting with an activity that promotes **cohesion**, or evoke feelings of unity and belonging.

Our coalition meets...

Every 2nd Monday from 11:30am to 1:00pm at
(Ex. 3rd Tuesday of the month) (start time) (end time)

Community Center - 123 Main Street, Your Town, USA.
(Location address - does this vary or stay consistent?)

Ground Rules

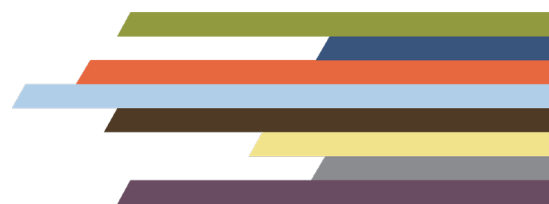
To assist in **efficiency** and **opportunities for participation** in coalition meetings, ground rules, or meeting expectations should be set during the first meeting as a group, and remain consistent for each meeting. The rules, or expectations should be co-created, and agreed upon by all members of the coalition.

Our ground rules are...

1. Be open and respectful to other's ideas.
2. Start and end on time.
3. Be present.

Decision-Making Process

Similar to ground rules, the decision-making process sets clear, consistent expectations around moving the coalition forward on actionable items. This process promotes **cohesion** and **opportunities for participation**, by allowing all members to have an equal voice in coalition-based decisions. What is best for your coalition? Full agreeance? Anonymous ballot? Voting majority?



Options for making a group decision are...

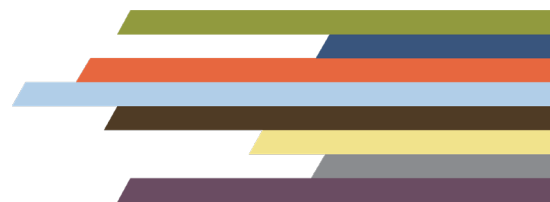
- Voting via e-mail
- Come to consensus
- Rank options
- Anonymous ballot
- Ad-hoc or executive committee makes final decision

Key Leaders

Key leaders are community members who support the coalition's mission, and have a broad sphere of influence in the community. These members may be opinion leaders, policy makers, funders, decision makers, and visionaries. Key leaders should represent **diverse stakeholders** to promote collaboration, and build strategic influence.

Our Key Leaders are...

<u>Family Physicians</u>	<u>School Administrators</u>	<u>Drug and Alcohol Administrators</u>	<u>Hospital Administrators</u>
<u>District Attorney</u>	<u>Judges</u>	<u>Mayor</u>	<u>City Council</u>
<u>Mental Health Professionals</u>	<u>County Administrators</u>	<u>Business Owners</u>	<u>Chief of Police</u>



Responsibilities of Key Leaders are to...

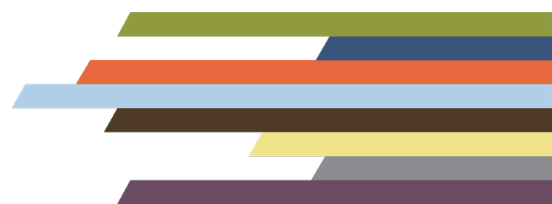
1. Attend yearly coalition meeting.
2. Support mission of coalition.
3. Allocate resources to coalition.

Community Board Members

How does the mission of the coalition turn into action? The community board members! The community members are a group of **diverse stakeholders**, representing and reflecting targeted sectors of the community, including traditionally underserved populations in the community. These members are usually volunteers who contribute their time, efforts, and resources in response to various **opportunities for participation** within the coalition. The community board members may also learn **new skills** by participating in the coalition board trainings and technical assistance, or in other more time-limited ad-hoc committees or specific activities. It is important to be mindful of time barriers that may limit some individuals' full participation and considerations should be made to assure their voice is still represented in the coalition activities.

Our Community Board Members are ...

<u>Parents</u>	<u>Business Owners</u>	<u>Schools</u>	<u>Youth</u>
<u>Media</u>	<u>Healthcare Professionals</u>	<u>Civic and Volunteer Groups</u>	<u>Faith-based organizations</u>
<u>Law Enforcement</u>	<u>Youth-Serving Organizations</u>	<u>Social Service Agencies</u>	<u>Local Government</u>



Responsibilities of Community Board Members are to...

1. Participate in a workgroup/team.
2. Attend coalition meetings regularly.
3. Assist in coalition yearly strategic planning.

Celebrating Members

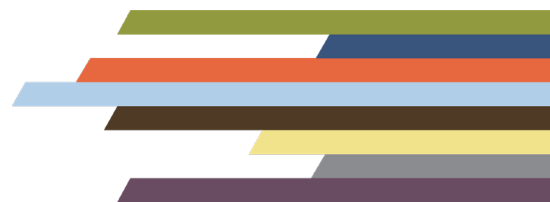
Celebrating the dedication of the community members to the coalition shows appreciation for their time and effort, and can assist in retention and **cohesion** of members as well! Many members are taking time away from their jobs, families, and other responsibilities to contribute to the coalition's mission for a healthier community. Without the work of the community members, coalitions would not exist!

We celebrate our members by...

- Providing lunch
- Acknowledging years of service to coalition
- Icebreaker activities
- Announcing personal or professional milestones at coalition meetings
- Certificate of Appreciation

Orienting Members

How are coalition members introduced to the history, structure, functionality, and other members of the group? An orientation process can ensure that all members understand the structure and vision of the coalition, strengthen ongoing coalition functioning, all while promoting coalition **cohesion** and belonging.



We orient our new members by...

- Creating handbook, or guide to distribute to new members.
- Assigning new members to a mentor.
- Introductions of all members at the start of each meeting.
- Meetings with coalition coordinator to discuss history, roles, and priorities of coalition.

Anticipated Outcomes

Outcome statements continue the **goal directedness** of a coalition's efforts by translating the mission statement into an achievable and quantifiable goal, or goals.

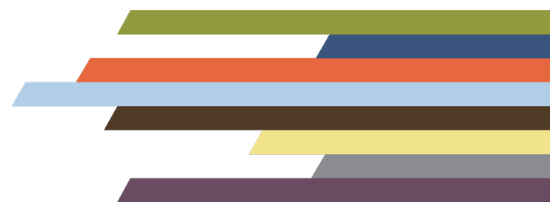
Outcome statements should specify:

- Desired change (i.e., increase or decrease)
- Type of change (i.e., knowledge, attitude, skill, behaviors)
- Population for change (i.e., which groups to change?)
- Instrument measuring change (i.e., what measurement instrument?)
- Timeline for change (i.e., by when?)
- How (i.e., by implementing program or change activity)

To increase/**decrease** depressive symptoms for 11th grade students
(highlight one) (What?) (Whom?)

as measured by Statewide Youth Survey by 2024
(how/instrument) (time)

by implementing The Blues Program
(program, initiative, etc.)



Coalition Annual Report Template

Now it's your turn to complete this report based upon **your coalition!** Use the previous examples and explanations in the beginning of this document, the supplemental instructional video, and the [Six Elements of Effective Coalitions handout](#) for assistance.

Mission Statement

*In the space below, please create your coalition's **mission statement**.*

To _____ by
(what you want to do)

_____ so
(how you'll do it)

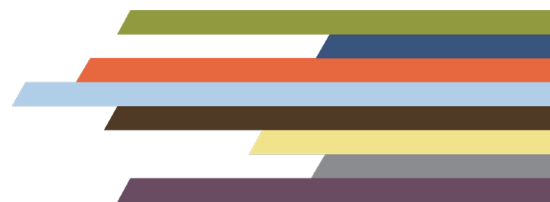
that _____
(what impact you hope to make).

Consistent and Purposeful Meetings

*Our coalition **meets**...*

Every _____ from _____ to _____ at
(Ex. 3rd Tuesday of the month) (start time) (end time)

(Location address – does this vary or stay consistent?)



Ground Rules

Our **ground rules** for each meeting are...

1. _____
2. _____
3. _____

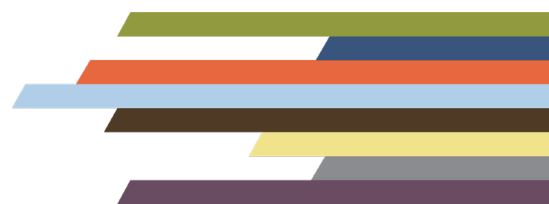
Decision-Making Process

Describe how your coalition makes **important decisions** below.

Key Leaders

Using the table below, **list your current key leaders**. Examples may be sectors represented within the coalition, name of individual, or specific job title.

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



List 3 **responsibilities** specific to the key leaders of the coalition.

1. _____
2. _____
3. _____

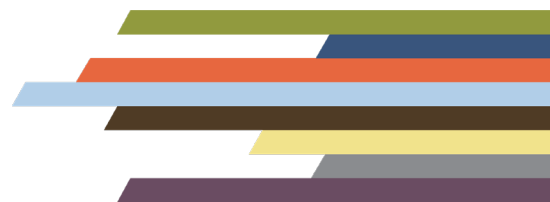
Community Board Members

Using the table below, **list your community members**. Examples may be sectors represented within the coalition, name of individual, or specific job title. Be sure to ask yourself, does our coalition reflect the diversity of individuals who live in our community? Are we including the youth voice?

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

List 3 **responsibilities** specific to the community members of the coalition.

1. _____
2. _____
3. _____

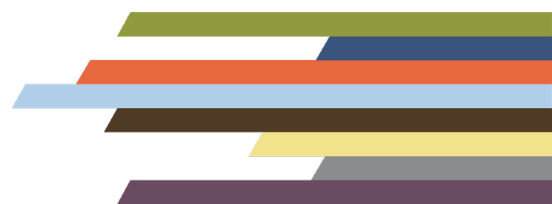


*Describe or list how your coalition **celebrates** their members below.*

*Describe or list how your coalition **orients** their members below.*

Anticipated Outcomes

Write your coalition's outcome statement(s) using the template below.



SAMHSA'S Northwest (Region 10) Prevention Technology Transfer Center

To increase/decrease _____ for _____
(select one) (What?) (Whom?)

as measured by _____ by _____
(how/instrument) (time)

by implementing _____
(program, initiative, etc.)

To increase/decrease _____ for _____
(select one) (What?) (Whom?)

as measured by _____ by _____
(how/instrument) (time)

by implementing _____
(program, initiative, etc.)

To increase/decrease _____ for _____
(select one) (What?) (Whom?)

as measured by _____ by _____
(how/instrument) (time)

by implementing _____
(program, initiative, etc.)

