# The Gathering Table: A Guide for Building Food System Coalitions

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#### To be used with

- o The Gathering Table: Coalition Workbook
- o The Gathering Table: Facilitator's Companion

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Introduction	4
The Purpose of This Guide	4
Why Local Leadership Matters	5
🔗 The Montana Food Economy Initiative (MFEI) Model	5
🌻 What We've Learned So Far	6
What Becomes Possible When Communities Lead	7
Contributors	7
📖 How to Use This Guide: Principles and Practices	8
Coalition Roadmap	10
Part 0: Getting Started - Introducing the Project and Building Your Coalit	ion 12
0.1 Clarify Your Coalition's Purpose	12
0.2 Initial Coalition Outreach: Inviting People to the Table	13
0.3 Introducing the Idea	13
0.4 Pre-Launch Data Scan (Preparing for the Snapshot)	14
0.5 Coalition Launch Plan	15
Cross-Cutting Practices & Guiding Principles	16
Part 1: Setting the Table – Forming a Coalition Rooted in Shared Values	18
1.1 Your Coalition Launch	18
1.2 Choosing How We Work Together	20
1.3 Building a Shared Understanding	24
Part 2: Expanding the Picture – Reviewing the Food System & Gathering	
Insights	25
2.1 Reviewing & Updating the Snapshot	25
2.2 Power Mapping: Who Shapes the Food System?	26
2.3 Planning for Community Insight Gathering	27
2.4 Connecting to Story and Narrative Power	27
2.5 Gap Identification & Planning	28
Part 3: From Understanding to Action	31
3.1 Why Sensemaking Comes Before Choosing (Workshop 3)	31

	3.2 What Makes a "Good" Coalition Project (and Why)	32
	3.3 Why Prioritize Transparently (Workshop 4)	33
	3.4 Why SMARTIE Goals (and Why Now)	34
	3.5 Why Action Planning + Community-Centered Metrics Belong Together	
	(Workshop 5)	35
	3.6 Why Pause to Reflect, Celebrate, and Adapt (Optional Workshop 6)	36
	3.7 Putting It All Together (The Strategic Through-Line)	36
Pä	art 4: Challenges and Solutions - Navigating Barriers & Sustaining	
M	lomentum	38
	4.1 Engagement Fatigue	38
	4.2 Resource Limitations	39
	4.3 Diverse Priorities & Perspectives	39
	4.4 Geographic & Logistical Barriers	40
	Part 4 Wrap-Up: Embracing Challenges as Growth	40
Pä	art 5: Monitoring, Reflection, and Evaluation	42
	5.1 Reflection & Celebration as a Practice	42
	5.2 Tracking Coalition Growth and Engagement	43
	5.4 Defining Success Through Community-Centered Metrics	45
	5.5 Case Studies: Community-Led Approaches to Food System Transformation	n46
	5.6 Connecting Statewide: Strength in Shared Effort	49
	Part 5 Wrap-Up: Building a Learning Coalition	49
Ρź	art 6: Conclusion – Stepping Forward Together	51

#### Introduction

Food connects us — to the land, to one another, and to the rhythms of the places we call home. At its best, a food system reflects the values, strengths, and needs of the people it serves.

This guide grew from that belief — and from the urgent reality that Montana is losing too much of its locally produced food. When we import more of what we eat, we lose not only self-reliance but also jobs, skills, and the culture of working the land.

The Alternative Energy Resource Organization (AERO), now operating as **Abundant Montana**, recognized that turning this around starts at the community level — where neighbors know the land, understand local challenges, and can create solutions that last. Between 2022–2025, AERO's program - **Montana Food Economy Initiative (MFEI)** partnered with communities across the state to understand their food systems, identify strengths and gaps, and take action.

We saw firsthand the power of bringing together people from across sectors — producers, health workers, educators, local officials, and residents — to strengthen local farms and ranches, increase access to healthy food, and keep food dollars circulating close to home.

But no single person or group can do it alone. It takes trust. It takes shared effort. And it takes a space — a table — where community members can meet, be heard, and shape their food future together. At the heart of this work is a simple idea: **stronger food systems create stronger communities.** 

# The Purpose of This Guide

This guide is for communities ready to grow something powerful — together. Whether you're forming a new food systems coalition, strengthening an existing one, or simply seeking better ways to work together, *The Gathering Table* offers:

- Practical steps to build strong, inclusive, action-focused coalitions.
- Tools to deepen relationships across sectors.
- Strategies to expand local sustainable agriculture, food access, and food security.
- Approaches to strengthen your local food economy and community health.

It's not a rigid manual — think of it as a **community cookbook** filled with adaptable ingredients, methods, and inspiration from Montana communities of all sizes. Take what works, adapt the rest, and make it your own.

# Why Local Leadership Matters

Food systems touch nearly every part of community life — agriculture, education, health, jobs, culture, and the environment. That complexity means there's no single path to strengthening them.

This guide supports you to:

- Build collaborative relationships between producers, local organizations, agencies, and residents.
- Assess strengths and challenges in your food system.
- Explore strategies that expand local sustainable agriculture, food access, and food security.
- Strengthen your local food economy and community health.

When communities lead their own food system work, change doesn't just happen — it lasts. Locally driven efforts create solutions that fit the place, the people, and the priorities.

We've seen this in action:

- Year-round greenhouses and community food campaigns improving food access.
- Local food systems integrated into resilience plans, making food security a community priority.
- Mapping of local food businesses to boost awareness and sourcing.
- Projects honoring cultural foodways while ensuring fresh, healthy food access.

These outcomes all share common ingredients: **relationships**, **trust**, **and a shared vision**.

# **𝔗** The Montana Food Economy Initiative (MFEI) Model

The MFEI model is a flexible, tested approach rooted in community leadership, cross-sector collaboration, and producer voice. Its key elements include:

- Community Food System Assessments (CFSAs) to identify assets, barriers, and priorities
- **Cross-Sector Engagement** linking health, education, agriculture, business, nonprofits, and government
- Producer-Led Projects ensuring solutions address real, on-the-ground needs
- **Statewide Networking** to connect coalitions with ideas, partners, and peer learning

This approach has worked in rural, urban, and tribal communities and can be adapted anywhere people are ready to gather around the table.

# What We've Learned So Far

Working alongside communities across Montana has shown us that the most lasting change happens when local people take the lead.

A coalition's success isn't just about the projects it launches — it's about the relationships, trust, and shared understanding it builds along the way.

#### Principles we've seen make the difference:

- Start with listening. Let community members not just organizations shape the vision.
- Trust is the foundation. Without it, collaboration won't last.
- Diversity is strength. A resilient coalition includes producers, health advocates, educators, businesses, and residents from all walks of life.
- Capacity matters. Dedicated time, coordination, and support keep momentum going.
- Celebrate progress. Recognizing wins, big or small, fuels continued engagement.

When communities lead their own food system work, possibilities expand:

- Solutions reflect local culture, geography, and values.
- Food access and community health improve.
- Producer livelihoods and local economies strengthen.
- Relationships deepen across sectors and generations.
- Shared language and goals emerge, making collaboration easier.
- Energy and hope grow for tackling bigger, long-term challenges.

# What Becomes Possible When Communities Lead

When communities take the lead in shaping their food systems, **change doesn't just happen** — **it lasts.** 

#### Examples include:

- **Helena**: A coalition's food system assessment became part of the city's resilience plan, making food security a community priority.
- **Fort Belknap**: A Food Sovereignty Coalition designed a greenhouse that honors cultural foodways while ensuring year-round access to fresh food.
- **Billings**: The "Taste the Agri-Culture" campaign mapped 40+ local food businesses, sparking momentum for local sourcing and consumer awareness.

Each of these efforts began with the same core ingredients: **relationships, trust, and a shared vision.** When those are in place, communities are better able to protect their health, grow their economies, strengthen their agriculture, and ensure reliable food access for everyone.

#### **Contributors**

This guide was created through a three-year Western SARE-funded project led by the Alternative Energy Resource Organization (AERO) in partnership with communities across Montana. It reflects the voices, knowledge, and commitment of coalition members in Helena, Fort Belknap, and Billings, as well as the many partners and residents who contributed their time, expertise, and lived experience to building stronger local food systems.

Alternative Energy Resource Organization (AERO) - Organizational Lead
Project Host & Montana Food Economy Initiative Lead
AERO — now operating as Abundant Montana program — initiated this project out of recognition that Montana's long-term sustainability is at risk due to the loss of locally produced food. By focusing on the community level, AERO supports the development of local and renewable food systems, which are essential for resilience, reliability, and sustainability. Through the Montana Food Economy Initiative (MFEI), AERO provided strategic guidance, resources, and statewide context for the coalition-building process."

Michal DeChellis, Cultivating Minds - Project Manager, Lead Coalition Facilitator,

and Author/Designer of The Gathering Table

Michal authored and designed *The Gathering Table* guide, shaping its structure, tools, and visual flow from concept to completion. She designed and facilitated all coalition meetings, creating inclusive spaces for collaboration and action. Michal coordinated data gathering and analysis in partnership with coalition members, synthesizing insights into clear, community-driven priorities. Working alongside AERO through this three-year Western SARE grant, she guided the project from vision to implementation, ensuring strategies remained grounded in local values and aimed at building sustainable, reliable, and renewable community food systems.

# Sydney Dickinson and Clare Jurczak, Local Food Coordinators, Abundant Montana - Local Coordination & Community Engagement

Sydney and Clare played an essential role in bringing community voices to the table. They identified and recruited coalition members, actively served on the coalitions, and participated in both data gathering and data analysis. Their deep local knowledge and connections ensured that coalition membership reflected a diversity of sectors, voices, and perspectives, and that the data collected was rooted in the lived experience of each community.

# How to Use This Guide: Principles and Practices

This guide is designed as both a **roadmap and a toolkit**. It will walk your coalition step-by-step through the process of forming, growing, and sustaining community-driven food systems work.

Think of it in three layers:

#### 1. The Coalition Workbook

This is your **core document**. It includes:

- The **Coalition Roadmap**, which lays out six workshops that move from first conversations to sustained action.
- Worksheets, templates, and reflection prompts for each step.
- Practical activities to help coalitions identify priorities, design projects, and set community-centered metrics.

 The Appendices, found at the back of this Workbook, which include additional tools and templates to support your coalition (e.g., Community Food System Snapshot Tool, Data Log Spreadsheet, Project Prioritization Matrix, Community-Centered Metrics).

**If you're a coalition member**: This is your hands-on resource. Use it during workshops to capture ideas, make decisions, and track progress.

# 2. The Facilitator's Companion

The Companion is a separate, behind-the-scenes resource. It provides:

- Agendas and timing for each workshop.
- Step-by-step facilitation notes.
- Guidance on managing group dynamics, equity, and participation.
- Tips for adjusting the process to fit your community.

**If you're a facilitator**: Use the Companion alongside the Workbook to prepare for and guide meetings.

# 3. Moving Through the Guide

Coalition building is not always linear. Some coalitions may move quickly through the roadmap; others may circle back or spend longer on a certain step. That's expected.

Here's what you can count on:

- The **Workbook** keeps everyone aligned and provides a common language.
- The **Companion** ensures facilitators are equipped to guide inclusive and productive meetings.
- The **Appendices** offer deeper tools when your coalition is ready to use them.
- The **Cross-Cutting Practices & Guiding Principles** (shown after Part 0) remind you that *how* you do the work matters as much as *what* you do.

# In short:

- **Coalition members**: Bring the **Workbook** to every workshop.
- **Facilitators**: Prepare with the **Companion** and weave in cross-cutting practices.
- **Everyone**: Return to the **Appendices** when you need more tools.

This structure ensures your coalition is equipped not just to start, but to grow and sustain work that reflects your community's values.

# **Coalition Roadmap**

Now that you know how this guide is structured, here's the big picture of the coalition journey. Think of this roadmap as your coalition's **journey map**: each workshop builds on the last, moving your group from initial conversations toward shared action. The order matters — early workshops focus on building trust and understanding your community's food system; later workshops focus on making decisions, designing projects, and planning for implementation.

While every coalition moves at its own pace, this sequence is designed to ensure you have the **relationships**, **information**, **and agreements in place** before moving into action. Between workshops, **Ongoing Practices** help sustain momentum, adapt to change, and keep relationships strong.

# **Workshop Sequence**

Workshop	Focus	
Workshop 0 – Coalition Foundations & Pre-Work	Clarify purpose, identify who should be at the table, plan outreach, and design your coalition launch.	
Workshop 1 – Coalition Launch	Build relationships and vision; set values and group agreements; choose an early leadership approach; introduce the Community Food System Snapshot and plan data gathering.	
Workshop 2 - Reviewing & Expanding the Community Food System Snapshot	Review and update the Snapshot; identify gaps; conduct power mapping; plan community insight gathering; explore story-based strategy and narrative power.	
Workshop 3 – Sensemaking & Priority Setting	prioritize focus areas; draft priority statements; begin	
Workshop 4 - Project SMARTIE Goal Setting	Translate priorities into SMARTIE goals; assign leads; refine coalition structure and distribute workload.	

Workshop 5 - Action Planning for SMARTIE Goals	Build action plans with tasks, timelines, partners, resources, and a tracking process. Embed community-centered metrics for each project so evaluation is built in from the start. Address challenges and strategies for sustaining momentum.	
Workshop 6 – Reflection & Celebration (Optional)	After several months of action, some coalitions choose to gather again for reflection, learning, and celebration. This is a chance to revisit community-centered metrics, share stories, and adjust course. Frame it as a reset and renewal point, not a required step.	
Ongoing Practices	These practices keep your coalition healthy and responsive between workshops.  • Seasonal coalition health check-ins.  • Reflection and evaluation prompts.  • Sustainability planning.  • Building peer networks.	

**Tip:** Keep this roadmap visible during your coalition's journey — it helps participants see where they've been, where they are now, and what's coming next.

**Tip:** Adapt the pace and order to fit your coalition's needs — the roadmap is a guide, not a rigid schedule.

# **■** Where to Find the Tools:

<u>**Download the Coalition Workbook:**</u> The Gathering Table Coalition Workbook — Use it during workshops and work sessions to reflect, plan, and build your strategy collaboratively.

**Download the Facilitator's Companion:** The Gathering Table Facilitator's Companion

# Part 0: Getting Started – Introducing the Project and Building Your Coalition

Before setting the table, someone has to light the fire. Every coalition begins with a spark—someone who recognizes a need or opportunity and is willing to gather others. This "convening group" might be informal, but it holds the early energy and vision for what's possible.

This part of the Guide helps you frame your interest, start conversations, and identify the people you want to invite to the table. It's about laying the relational groundwork that makes your coalition possible.

*Workbook Connection: Workshop 0 – Coalition Foundations & Pre-Work (Activities 1–4)* 

Use this session to clarify purpose, identify representation gaps, plan inclusive outreach, review existing data, and design your coalition's launch gathering.

# **0.1 Clarify Your Coalition's Purpose**

Workbook Connection: Workshop 0 – Activity 1: Clarify Your Coalition's Purpose (with an early preview of Activity 2: Identifying Who Should Be at the Table).

A coalition is strongest when its purpose is clear and its membership is diverse, inclusive, and representative of the full food system. Without this clarity, coalitions risk drifting or being shaped by the loudest voices in the room.

In this early stage, you will:

- Define why the coalition is forming and what success looks like.
- Map who needs to be at the table and identify missing voices.
- Plan how to recruit and welcome those voices.

#### Why it matters

- **Purpose is your north star.** It not only attracts members but sustains energy when challenges arise.
- **Representation shapes legitimacy.** If certain voices are missing, solutions will be incomplete or untrusted.
- **Early clarity builds momentum.** People are more likely to commit their time when they understand both the "why" and the "who" of the coalition.

# **0.2 Initial Coalition Outreach: Inviting People to the Table**

Workbook Connection: Workshop 0 – Activity 2

Outreach is your coalition's first practice of equity. Who you invite — and how you invite them — sends a powerful signal about whether this is a coalition of the "usual suspects" or a genuinely inclusive effort.

Why it matters: Outreach is not just recruitment — it's relationship-building. Early invitations show that this is a coalition where everyone matters. The Workbook guides coalitions to consider representation and inclusion (who's directly affected, who's missing), power and influence (decision-makers, connectors), commitment and energy, and skills/knowledge. Using these prompts ensures your coalition starts with diversity and equity at the center. This activity builds directly on the previewed representation work in Activity 1, giving the coalition a fuller picture of who needs to be at the table and how to invite them with intention.

Remember: Each invitation is also a story. It tells potential members: "This coalition is for you, and your voice is essential."

# 0.3 Introducing the Idea

Workbook Connection: Workshop 0 – Activity 3: Introducing the Idea

**Purpose:** Help people understand the vision and get excited to join.

An early coalition "pitch" is more than words — it's the seed of the coalition's founding story. These first stories will be repeated and reinforced, becoming part of the coalition's identity.

# Why it matters

• Narrative frames possibility. If the story is framed around deficits ("we don't have enough local food"), energy can stall. If it's framed around

- aspirations ("we can grow a vibrant, resilient food system together"), people are inspired.
- **Stories travel.** A well-crafted introduction spreads organically as participants share it with their networks.
- **Metaphors matter.** Using accessible imagery (like the *Gathering Table*) makes the work feel human and relatable.

#### Tips for introducing the work

- Use story and imagery (e.g., resilience, care, local pride).
- Keep language values-driven and welcoming.
- Start with conversations, not presentations dialogue builds trust.

# 0.4 Pre-Launch Data Scan (Preparing for the Snapshot)

Workbook Connection: Workshop 0 – Activity 4: Pre-Launch Data Scan

Before the coalition gathers for its Launch, it's helpful for the convening group to do a quick scan of what's already known about the local food system. This is not about producing a full report — it's about surfacing existing information so the coalition has a starting point.

Think of this as a "light" version of the Community Food System Snapshot Tool, which will be fully introduced in Workshop 1. For now, this scan helps the convening group surface what's already known and spot obvious gaps.

#### Why it matters:

- Helps identify gaps in data, representation, or perspectives early.
- Lays the groundwork for using the **Community Food System Snapshot Tool** in Workshop 1.
- Ensures the coalition conversation begins with some shared context.

#### What to do:

- Review available local, regional, or state data (e.g., food access, producer surveys, existing reports).
- Capture only the key points in the Workbook's Pre-Launch Data Scan prompts.

• Flag gaps or missing perspectives to return to once the full coalition is at the table.

 ☐ The <u>Community Food System Snapshot Tool</u> lives in the Workbook and is formally introduced in Workshop 1. Coalitions will use it as their single, shared record to collect, update, and expand food system information throughout the process.

#### 0.5 Coalition Launch Plan

Workbook Connection: Workshop 0 – Activity 5: Coalition Launch Plan

The Coalition Launch is your first large-group gathering — the moment when individuals become a coalition. Your planning group will decide the purpose, agenda, and logistics that make it welcoming, energizing, and grounded in your community's food system priorities.

#### Why it matters

- Launches are culture-setting moments. They communicate values not only through the agenda, but through the environment: the food you share, the accessibility supports you offer, the way people are welcomed at the door.
- What people feel matters as much as what you do. Ask: "How do we want people to feel when they leave the launch?" Inspired? Included? Ready to act? That feeling is as important as the outputs.
- **Shared ownership starts here.** By co-designing the launch, you model distributed leadership and make it clear this coalition belongs to everyone.

This is also the first visible expression of your coalition's culture — modeling equity, care, and inclusion from the very beginning.

# Transition to Part 1

With a clear purpose, inclusive outreach plan, early data scan, and launch design, your coalition is ready to gather for the first time. Part 1 will guide you through the Coalition Launch — the foundational workshop where vision, values, and agreements take root, giving your coalition both a shared foundation and a unifying story.

# **Cross-Cutting Practices & Guiding Principles**

These practices run across the entire coalition journey. Introduced here for reference, they will become more meaningful as you move through the workshops. Coalition building is more than completing activities — it's about how you show up together. The practices below are not stand-alone steps, but ways of working that should infuse every workshop, meeting, and decision. Keeping these alive will make your coalition stronger, more inclusive, and more resilient.

**Equity & Inclusion:** Ask at every step: Who is at the table? Who isn't? How do we ensure underrepresented voices are centered, not just invited?

**Storytelling & Narrative:** Stories move people. Share why this work matters in ways that resonate locally — through metaphors, personal stories, and community narratives.

**Relationships & Trust:** Strong coalitions prioritize connection as much as tasks. Building trust takes time, listening, and care, but it is the foundation for collective action.

**Learning & Adaptation:** Conditions change. Take time to reflect, learn from challenges, and adapt strategies so your coalition remains responsive and resilient.

**Planning Your Rhythm:** Consistency creates stability. Decide early how often you'll meet and how you'll maintain momentum between sessions. Your rhythm should balance productivity with sustainability.

**Inclusive & Effective Facilitation:** Good meetings don't happen by chance. Effective facilitation balances structure and flexibility, task and relationship, efficiency and inclusion. It ensures all voices are heard, especially in high-stakes or emotional moments.

**Gathering with Intention:** Coalition gatherings are more than business. They're chances to celebrate progress, deepen relationships, and reconnect to your "why." Food, storytelling, or small rituals can make meetings energizing instead of draining.

**Sustaining the Spark:** Energy continues between gatherings. Share recaps, gratitude, and small wins; highlight stories, photos, or quotes that keep people inspired and connected.

*₹* Tip: Post these principles in your coalition space, keep them in your agenda template, or revisit them during check-ins. The more visible they are, the more naturally they will shape your coalition's culture.

# Part 1: Setting the Table – Forming a Coalition Rooted in Shared Values

*Workbook Connection:* See Workshop 1 – Coalition Launch for full agenda, activity guides, and outputs for this stage (Activities 1–5).

How we come together matters — especially when the goal is to strengthen local food economies, improve food access, and support sustainable agriculture in our own backyards. Part 1 is about laying the foundation for a strong coalition: a shared purpose, clear agreements, guiding values, and a predictable rhythm for working together. These elements create the trust and consistency that keep people engaged over time.

This stage follows **Part 0: Getting Started** and centers on your **Coalition Launch** — the first time your group gathers as a coalition. The launch is more than just a meeting; it's your first act as a collective, when individual priorities start to merge into a shared mission.

#### 1.1 Your Coalition Launch

Your coalition's launch is a pivotal moment — it sets the tone, builds trust, and sparks momentum. A strong launch weaves together storytelling, relationship-building, and shared visioning, giving members a reason to return and commit. These building blocks aren't just formalities; they are the cultural DNA of your coalition. Decisions made here ripple forward, shaping trust, equity, and effectiveness.

#### 1.1.1 Clarifying Purpose and Shared Vision

Workbook Connection: Workshop 1 – Activity 1: Visioning a Thriving Local Food System.

Visioning is where collective hope takes shape. It's less about crafting perfect words and more about creating a process that feels real, resonant, and inclusive. A vision grounds the coalition's work, guides decisions, and inspires action.

 Why it matters: Without a shared vision, members may pull in different directions, leading to burnout or conflict. A vision serves as the coalition's North Star, reminding everyone why they're at the table even when challenges arise.

- When it works best: Visioning early sets a unifying tone, but the vision should be revisited over time as the coalition grows and learns.
- *Common pitfall:* Mistaking a vision statement for a finished product. The power is in the **process of co-creation**, not just the words.

#### 1.1.2 Defining Coalition Values

Workbook Connection: Workshop 1 – Activity 2: Coalition Values

Values are the coalition's compass. They reflect what matters most to your community and guide decisions that impact local producers, food businesses, and residents.

- Why it matters: Values make hard decisions easier. When conflicts emerge about priorities, projects, or funding values serve as a touchstone for alignment. They also communicate to outsiders what the coalition stands for.
- When it works best: Values are especially powerful when lived out, not just written down. They should be referenced in meetings, used to weigh options, and woven into coalition communications.
- *Common pitfall:* Treating values as generic words (e.g., "collaboration," "equity") without defining what they mean in your specific place and practice.

The Workbook walks you through a values activity that helps coalitions move beyond generic words to locally defined commitments.

# 1.1.3 Developing Group Agreements

Workbook Connection: Workshop 1 – Activity 3: Group Agreements

Group agreements are your coalition's ground rules — how you'll communicate, make decisions, and handle disagreements. They keep the coalition respectful, productive, and welcoming, even during hard conversations.

- Why it matters: Group agreements build psychological safety. When people know how conflict will be handled and what respect looks like, they're more likely to share honestly and stay engaged.
- When it works best: Agreements created early prevent small tensions from snowballing. They're most effective when co-created and revisited regularly, not imposed or forgotten.
- *Common pitfall:* Overloading the list with too many rules. Agreements should be short, clear, and practical living commitments that members can hold each other accountable to.

The Workbook activity provides prompts to keep the list concise, actionable, and tied to your coalition's real context.

# **1.2 Choosing How We Work Together**

Workbook Connection: Workshop 2 – Activity 1: Choosing Coalition Structure, Leadership, and Decision-Making

Once your coalition has a shared vision, values, and agreements, the next step is deciding *how you will work together in practice.* These early choices don't need to be permanent — they can evolve as the coalition grows — but setting an initial structure builds clarity, accountability, and trust.

#### 1.2.1 Coalition Format

Coalitions can take different shapes depending on their purpose, capacity, and goals. Each format carries benefits and risks:

- **Informal Coalition** Best for early stages when the goal is networking, exploring ideas, and building trust. Low barriers to entry make it easy for new members to join. The risk is that without clarity, momentum can fade or responsibility falls unevenly. Works well if your coalition is still figuring out its purpose or testing interest.
- Formal Coalition Useful when the group is ready to manage funding, staff, or grants. Formal bylaws and leadership reassure external partners and funders. The tradeoff is that formalization can feel bureaucratic or exclusive if it comes too soon. Best once trust is strong and the group is prepared for bigger commitments.

- **Time-Limited Coalition** Effective for campaigns, events, or projects with a clear end date. Gives people confidence about the scope of their commitment and can prevent burnout. Risk: energy may vanish once the project ends unless there's a plan for next steps.
- **Ongoing Coalition** Needed when the goal is systemic change or long-term resilience. Offers continuity and adaptability but requires regular renewal to keep energy alive. Without renewal, members may drift or fatigue may set in.

The Workbook introduces structure options and prompts you to choose the one that best fits your coalition's current stage.

Fig. Think of structure as a living choice. What works in year one may not serve you in year three. Revisit your structure regularly and ask: Does this still fit our purpose, values, and members?

#### 1.2.2 Leadership Options

*─ Workbook Connection: Workshop 2 – Activity 1 (Leadership Options)* 

Leadership is how power gets shared in practice. The style you choose should match your coalition's values and stage of development:

- **Rotating Leadership** Great for building skills and preventing burnout, especially in the early stages. Everyone gets a chance to facilitate and contribute. Risk: may feel inconsistent or slow if members don't all have the same level of facilitation experience.
- **Shared Leadership** A steering team or small group collaborates on decisions and planning. Balances workload and builds resilience by not relying on one person. Works well once the coalition has built trust and needs more coordination.
- **Anchor Organization Model** A host organization provides backbone support like staff time, funding, or logistics. This can stabilize the coalition and make it easier to manage grants. Risk: power can concentrate in the anchor unless the coalition is intentional about equity and voice.

Fig.: Leadership choices communicate values. If equity and inclusion are priorities, ensure your leadership model makes space for new and historically underrepresented voices.

#### 1.2.3 Decision-Making

# Workbook Connection: Workshop 2 – Activity 1 (Decision-Making)

Transparent decision-making avoids confusion and strengthens legitimacy. Each approach has different strengths depending on coalition size, stage, and culture:

#### Consensus

- When it fits best: Early stages, when trust is still forming and the coalition is clarifying values. Also useful for big directional decisions (vision, values, goals) where deep buy-in matters more than speed.
- Why it works: Ensures every voice is considered and prevents major fractures later. People are more committed to decisions they had a hand in shaping.
- Tradeoffs: Takes time and skillful facilitation; risks lowest-common-denominator outcomes if people compromise too much.
- Example: A coalition deciding on its vision statement uses consensus so all members feel ownership of the language.

#### Majority Vote

- When it fits best: Large groups or moments when a clear, timely decision is needed (e.g., choosing a meeting date, approving a budget line).
- Why it works: Efficient, straightforward, and familiar to many. Helps keep momentum when decisions could otherwise stall.
- Tradeoffs: Risks leaving some members disengaged, especially if the same "side" always wins. Without trust, voting can feel adversarial.
- Example: A coalition with 30 members votes to select its top two project ideas from a list of ten.

#### Hybrid

- When it fits best: Mid- to late-stage coalitions with working groups or committees. Useful when some decisions require expertise or smaller group focus, but the whole coalition still needs ownership of big calls.
- Why it works: Balances inclusivity with efficiency. Allows for depth in small groups while keeping the coalition in the loop.
- Tradeoffs: Requires clear communication and transparency so people trust committee recommendations. Without feedback loops, members can feel excluded.

 Example: A policy working group drafts a proposal for school food procurement changes. The full coalition reviews and approves the final recommendation.

#### 1.2.4 Sharing Responsibilities

Workbook Connection: Roles & Responsibilities Matrix Workbook Appendix C

*Prool:* Roles & Responsibilities Matrix (Workbook Appendix C). Use it to map tasks, spot gaps, and ensure responsibilities are shared fairly.

Strong coalitions spread the work so no one person carries it all. The way you share responsibilities shapes not just efficiency, but ownership and sustainability.

#### Working Groups

- When it fits best: Mid- to late-stage coalitions, when members are ready to dive deeper into specific topics (e.g., outreach, youth engagement, policy).
- Why it works: Lets people focus where they have energy or expertise, building leadership at multiple levels. Keeps the coalition's agenda moving on multiple fronts at once.
- Tradeoffs: Risk of "siloing" if working groups don't report back or coordinate. Requires good facilitation to keep groups aligned with coalition purpose.
- Example: A coalition creates a Farm-to-School working group to meet monthly, while the main coalition gathers quarterly. The group's progress is reported back at coalition meetings.

# Rotating Roles

- When it fits best: Early stages, or anytime the coalition wants to build shared skills and avoid over-relying on one person.
- Why it works: Distributes ownership and develops leadership capacity across the group. Encourages members to see themselves as co-responsible for coalition health.
- Tradeoffs: Can feel uneven if members aren't equally comfortable with facilitation or note-taking. May need light coaching or support to ensure quality.

 Example: Each coalition meeting rotates facilitation and note-taking among members. Over time, multiple people gain confidence in these roles.

#### • Flexible Expectations

- When it fits best: Always but especially in community-based coalitions where members have other jobs, family duties, or seasonal work.
- Why it works: Recognizes that capacity ebbs and flows. People can lean in more when they have time and pull back when life gets busy, without guilt or judgment. Builds long-term commitment by honoring reality.
- Tradeoffs: Without clear communication, tasks may fall through the cracks. Works best when paired with a simple accountability system (e.g., task tracker or roles matrix).
- Example: During harvest season, producer members step back from heavy tasks while others take the lead. Later, producers bring renewed energy once their schedules lighten.

*?* Tool: Use the Roles & Responsibilities Matrix (see Workbook Appendix C) to map tasks, spot gaps, and make sure responsibilities are shared fairly across members.

# 1.3 Building a Shared Understanding

Workbook Connection: Workshop 1 – Activity 5: Snapshot Mini-Orientation

Before a coalition can make decisions about priorities and goals, it needs a shared picture of the local food system. Without a common foundation, members may talk past one another, rely on different assumptions, or miss critical perspectives.

The Community Food System Snapshot Tool provides that foundation. It is a simple framework that organizes what you know — and what you still need to learn — across five key food system sectors and supporting assets. The Snapshot is not a comprehensive research report, but a living document that blends secondary data, coalition members' knowledge, and community voices.

At this early stage, the goal is simply to introduce the Snapshot and orient members to its purpose. You don't need to review every detail or fill in all the gaps yet — that comes later in Workshop 2. For now, make sure members understand that the

Snapshot will be your coalition's shared reference point, one you will return to and expand together.

This orientation is a preview. A deeper review of the Snapshot happens in Workshop 2, when coalitions cluster data into themes and begin identifying priorities.

Fig. Show the Snapshot visually — on a wall chart, projector, or handout — so people see the structure. Invite initial reactions, but keep the deep review for later.

# Transition to Part 2

With a shared vision, values, agreements, structure, and an initial Snapshot orientation in place, your coalition has a strong foundation. You've clarified not only what you want to achieve but also how you'll work together and what baseline you're starting from.

The next step is to expand the picture: reviewing and updating your Community Food System Snapshot, identifying gaps, gathering community insights, and mapping the relationships and power structures that shape your food system. Part 2 builds directly on the Snapshot, guiding your coalition to review and interpret the data together before moving into theme clustering and project ideas.

# Part 2: Expanding the Picture – Reviewing the Food System & Gathering Insights

Workbook Connection: Workshop 2 – Activities 1–5: Reviewing & Expanding the Community Food System Snapshot; Power Mapping & Influence Grid; Community Insight Gathering Plan; Story-Based Strategy & Narrative Power; Gap Identification & Planning

By this stage, your coalition has set the table: you've launched with a shared vision, values, and agreements, chosen a way of working together, and oriented yourselves to the Community Food System Snapshot. Now it's time to **deepen that picture**.

Part 2 is about moving from what *you think you know* to what the *community truly experiences*. That requires three things: grounding your work in evidence (Snapshot + data), surfacing dynamics of power and influence, and intentionally listening to voices beyond the coalition. Stories and narratives are woven throughout — they are what transform information into meaning.

Together, these steps prevent blind spots, strengthen equity, and ensure your coalition's decisions are rooted in legitimacy and trust.

# 2.1 Reviewing & Updating the Snapshot

Workbook Connection: Workshop 2 – Activity 4: Snapshot Orientation + Workshop 3 – Activity 1: Data Review & Gallery Walk

The Community Food System Snapshot is only useful if the coalition actively engages with it. This workshop brings the full group back to review what's been collected so far, add missing details, and update out-of-date information.

#### What to Do:

- Display the Snapshot tool (projector, large paper, or shared digital doc).
- Ask coalition members: What's missing? What doesn't reflect lived experience?
- Capture updates live in the tool.
- Note areas where more data or perspectives are needed.

# **Why This Matters:**

- **Accuracy** Numbers alone can be misleading; validating them against lived experience makes the data truer.
- **Inclusion** Different members hold different pieces of the system. Surfacing that knowledge helps prevent decisions driven by a narrow view.
- **Trust** When members see their input incorporated, confidence in the coalition's process grows.

Fig. Encourage members to bring stories as well as facts — for example, "That farmer retired last year," or "The food pantry's hours changed." These details make the Snapshot a living reflection of the community.

# 2.2 Power Mapping: Who Shapes the Food System?

Workbook Connection: Workshop 3 – Activity 3: Power Mapping & Influence Grid

Food systems are not just about flows of food — they are shaped by flows of **power, influence, and trust**. This step helps the coalition recognize who makes decisions, controls resources, or shapes narratives, whether through formal roles (e.g., elected officials, agency staff) or informal authority (e.g., elders, organizers, local champions).

#### **Why This Matters**

- **Reveals hidden dynamics:** Influence doesn't always follow titles. A quiet community leader may have more sway than an official.
- **Prevents surprises:** By identifying influential actors early, coalitions avoid hitting invisible roadblocks later.
- **Guides outreach strategy:** Knowing where influence and trust reside helps you prioritize relationship-building intentionally.

Fig. Frame power mapping as clarity, not judgment. The Influence Grid in the Workbook helps analyze influence (ability to make change) and trust (community credibility) together. Both matter for coalition success.

# 2.3 Planning for Community Insight Gathering

Workbook Connection: Workshop 2 – Activity 3: Planning Community Insight Gathering

Your coalition cannot rely only on its own members' knowledge. Community insight gathering ensures your decisions reflect the lived experiences of those most affected by the food system — especially those not yet at the table.

#### **Ways to Gather Insights**

- Community listening sessions or focus groups.
- Surveys (digital or paper).
- Story circles and narrative collection.
- Informal conversations at markets, school events, or Tribal ceremonies.

#### **Why This Matters**

- **Equity:** Underrepresented voices must shape solutions to avoid reinforcing disparities.
- **Legitimacy:** Decisions are more credible when grounded in broader community voice.
- **Relevance:** Lived experience often reveals barriers data alone cannot (e.g., transportation, stigma, cultural practices).

Fig. Some of the richest insights come in unexpected places — a conversation at a food pantry, a hallway after a meeting, or a youth gathering. Be intentional, but also open to informal learning moments.

# 2.4 Connecting to Story and Narrative Power

Workbook Connection: Workshop 3 – Activity 4: Story-Based Strategy & Narrative Power

**Narrative power** is the ability of stories to shape what people see as normal, possible, or worth fighting for. It's not just about telling a single story — it's about which stories get repeated, whose voices are heard, and how those stories influence decisions.

At this stage in coalition building, you've already developed vision, values, and agreements (Workshop 1), chosen how to work together (Workshop 2), and started making sense of your community's food system data (Workshop 3). Story-based strategy comes in now because it ties those earlier steps to the bigger *why*. Coalitions don't just work with data; they also have to shift the stories that define what the community believes is possible.

#### **Key Terms**

- **Dominant story:** A commonly repeated belief that sets limits on what people think is possible. These stories often come from those in power or from repeated negative experiences.
- **Counter-story:** A story of resilience, success, or possibility that challenges the dominant story and opens up new ways of seeing what's achievable.

#### **Why This Matters**

- **Narratives set the frame:** They shape the boundaries of debate. If the dominant story is "healthy food is too expensive," that will block policy and investment no matter how strong your data is.
- **Stories inspire action:** Facts inform, but stories are what move people to care, show up, and commit.
- **Counter-stories expand possibility:** Sharing examples of success helps people believe change can happen in *their* community, not just somewhere else.

#### **Examples in Practice**

Dominant Story	Counter-Story	Why It Matters for Strategy
"Farmers can't make a living here."	"Our local co-op grew sales by 40% by working directly with producers."	Counter-stories shift the narrative from scarcity to opportunity.
"Healthy food is only for the wealthy."	"Our school district now serves locally grown carrots and accepts SNAP for family food boxes."	Counter-stories reframe local food as inclusive and widely accessible.

# **How Coalitions Use This Step**

Story-based strategy isn't about "spin." It's about listening for the stories already

shaping your community, deciding which ones help or hinder your goals, and then lifting up the counter-stories that reflect resilience and possibility. This makes your coalition's projects more than plans on paper — they become part of a larger story about who your community is and what future it is building.

**Fip:** Narrative power isn't confined to one activity. Keep weaving stories into meetings, check-ins, and outreach. They sustain energy, deepen trust, and keep the coalition grounded in community voices.

# 2.5 Gap Identification & Planning

Workbook Connection: Workshop 2 – Activity 5: Gap Identification & Planning

After reviewing the Snapshot, mapping power, gathering insights, and lifting up stories, your coalition will still notice gaps — missing data, missing voices, or missing relationships. This activity helps you **decide which gaps matter most to address now** and create a plan to do so.

#### What to Do

- Document a Gap & Next Steps table that clarifies:
  - What's missing?
  - Why does it matters.
  - Who will follow up?
- Focus on the most consequential gaps, not all gaps.

# **Why This Matters**

- **Protects against bias:** Decisions made with incomplete information risk reinforcing inequities.
- Builds credibility: Acknowledging what's missing shows honesty and rigor.
- Keeps momentum: Tackling a few key gaps prevents overwhelm and maintains progress.

Prip: Treat gaps as opportunities. Each gap highlights where your coalition can expand relationships, invite new voices, and strengthen its reach.

# **Transition to Part 3**

At this point, your coalition has both a foundation (vision, values, agreements) and a growing body of knowledge (Snapshot, power map, community insights, stories, and a gap plan). The next step is to make sense of it all: clustering themes, identifying priorities, and preparing to set goals. This is where raw information becomes shared meaning — and where coalitions begin shifting from understanding into action.

# **Part 3: From Understanding to Action**

Coalitions move best when they move together. Part 3 explains why the journey from data  $\rightarrow$  meaning  $\rightarrow$  choices  $\rightarrow$  goals  $\rightarrow$  plans matters — and how each step strengthens legitimacy, equity, and staying power.

This section orients leaders and members to the purpose behind **Workshops 3–5** (and the optional Workshop 6), so the group understands not just what we're doing but why it matters.

# 3.1 Why Sensemaking Comes Before Choosing (Workshop 3)

Coalitions often rush to projects. Sensemaking slows you down just enough to *see together before you do together*. This workshop is about taking everything the coalition has gathered so far — data, perspectives, gaps, and stories — and working through it systematically until shared meaning and direction emerge.

Think of these activities as a sequence: they start broad, then get more focused.

# • Data Review & Gallery Wall

- What it is: Members move around the room reviewing data posted on walls, charts, or digital stations.
- Why it matters: Movement sparks curiosity and conversation. People notice patterns they'd miss in a slideshow. Instead of the facilitator telling them what's important, the group discovers meaning together

   building ownership of the evidence.

#### • Theme Clustering

- What it is: The coalition organizes observations into themes or storylines.
- Why it matters: Themes are not categories; they are explanations. A strong theme helps the coalition see why an issue persists and hints at leverage points for change. Without themes, coalitions risk chasing symptoms instead of root causes.

# • From Themes to Project Ideas

• What it is: Once themes are clear, the coalition brainstorms project ideas that flow from them.

 Why it matters: Brainstorming while themes are fresh ensures project ideas are grounded in shared understanding, not just in the loudest person's favorite concept. This step bridges collective learning into collective action.

#### Power Mapping & Influence Grid

- What it is: The coalition identifies stakeholders by influence and trust.
- Why it matters: Mapping helps clarify where to build bridges, strengthen allies, and spot gaps in representation. Without this, coalitions may miss critical relationships or reinforce inequities.

# Story-Based Strategy & Narrative Power

- What it is: Surfacing dominant and counter-stories that shape what feels possible.
- Why it matters: Stories influence strategy as much as data. Naming and shifting narratives ensures projects are rooted in possibility, not just barriers.

**Facilitator Insight:** Sensemaking isn't about speed — it's about legitimacy. A coalition that takes time to see clearly together will save time later by avoiding false starts, hidden disagreements, and projects that don't stick.

# 3.2 What Makes a "Good" Coalition Project (and Why)

*Workbook Connection: Workshop 3 − Activities 2 & 5 (Theme Clustering + From Themes to Project Ideas)* 

Not every idea is a good coalition project. Some may be exciting but not strategic, others may align with individual interests but not the coalition's shared purpose. This section explains why criteria matter — not as a "test," but as a shared rationale for advancing some projects first. In the Workbook, coalitions cluster themes and brainstorm project ideas. Here, you'll see the criteria that help sort which of those ideas are strong enough to move forward.

# **Core Qualities of a Strong Coalition Project**

- **Aligned** Advances your shared vision, responds to themes, and will later map to a SMARTIE goal.
- **Community-rooted** Designed *with, not for* those most affected (producers, low-income families, Tribal members, youth).

- **Actionable in 6–18 months** Right-sized to coalition capacity; delivers visible wins that build momentum.
- **Equitable by design** Benefits reach historically underrepresented groups and reduce disparities.
- **Collaborative** Partners with energy or resources see their role clearly (lead, support, advise).
- **Measurable** Progress can be tracked through both numbers and stories.

#### **Common Pitfalls to Avoid**

- Too big, too soon → ambition outpaces bandwidth → missed deadlines, waning trust.
- Too narrow → tidy project that doesn't matter to the community → low adoption.
- Leader-dependent → fragile because it hinges on one person.
- Uncosted  $\rightarrow$  inspiring idea with an invisible price tag  $\rightarrow$  stalls out.

#### Why this matters

When criteria are explicit, the coalition builds legitimacy. Members and the community can see not only what projects were chosen, but *why*. Clear rationale prevents "pet projects" from dominating and keeps energy focused on work that reflects coalition values.

# 3.3 Why Prioritize Transparently

Workbook Connection: Workshop 4 – Activity 1 (Project Prioritization)

Coalitions generate more good ideas than they can take on at once. That's a strength — it shows creativity and energy. But without a way to choose, coalitions risk either stalling out or defaulting to the loudest voice. Transparent prioritization is how coalitions move from possibilities to shared commitments.

Before coalitions can set priorities, they need to transform raw data into a manageable set of shared insights. This usually means clustering observations and additions from the Snapshot review into 4–7 plain-language themes. These themes act as the bridge between "what we've learned" and "what we will act on," helping the group see patterns, name dynamics in accessible language, and build the foundation for fair and transparent priority-setting.

#### **Why This Matters**

- **Legitimacy** Shared criteria (values, feasibility, cost, community impact, alignment) make choices clear and defensible. Even if someone's favorite project doesn't advance, they can see the fairness in the process.
- Trust People stay engaged when they believe decisions weren't made behind closed doors. Transparency builds confidence that all voices are valued.
- **Strategic sequencing** Not every good idea is a first idea. Prioritization helps coalitions choose which projects pave the way for others.

**Facilitator Tip:** Weight your criteria. For example, if "Community Impact" matters more than "Cost," say so. Making those values explicit prevents hidden bias from creeping into decisions.

**Deeper Why:** Transparent prioritization isn't just about process — it's culture-shaping. It models fairness, keeps power accountable, and demonstrates to the community that coalition choices aren't arbitrary but principled.

# 3.4 Why SMARTIE Goals (and Why Now)

Workbook Connection: Workshop 3 – Wrap-Up: Transition into SMARTIE Goals

Workshop 4 − Activities 2−5: SMARTIE Goal Drafting, Refinement, and Assignment Froject & Action Planning Toolkit − SMARTIE Goal Notes Table

Ideas alone don't change systems. Goals are what transform coalition energy into measurable, trackable progress. **SMARTIE** (**Specific**, **Measurable**, **Achievable**, **Relevant**, **Time-bound**, **Inclusive**, **Equitable**) goals are more than an acronym — they are a discipline that keeps coalitions grounded in their values while ensuring action is realistic and accountable.

#### **Why This Matters:**

- **Focus** Specific & Relevant goals prevent drift and keep coalitions from spreading too thin.
- **Visibility** Measurable & Time-bound goals make progress visible, sustaining morale.

- **Realism** Achievable goals protect the coalition from burnout and cynicism.
- **Equity** Inclusive & Equitable goals ensure the way you pursue change reflects the why of your coalition.

#### **Priority Statements as Anchors**

Before drafting SMARTIE goals, coalitions craft a short **Priority Statement**: why this matters, who's most affected, and what change is needed. This brief narrative roots the goal in coalition values and lived experience. It also becomes a powerful communication tool when engaging partners and funders.

#### **Toolkit Support**

The Workbook points coalitions to the **SMARTIE Goal Notes Table** in the Project & Action Planning Toolkit. The table prompts groups to capture each SMARTIE element, alongside leads and next steps. Using the table ensures consistency, clarity, and accountability as goals move from draft to refinement.

**Facilitator Tip:** Assign leads as goals are drafted. Accountability is not just administrative; it's relational. Naming responsibility early spreads ownership and prevents slippage.

# 3.5 Why Action Planning + Community-Centered Metrics Belong Together

*Workbook Connection: Workshop 5 – Activities 1–4: Review SMARTIE Goals; Action Planning Table; Plan & Share; Choosing Community-Centered Metrics* 

Tool Link: Project & Action Planning Toolkit (Action Planning Table + SMARTIE Goal Notes Table)

Appendix Reference: See Appendix B in the Workbook (Community-Centered Metrics Examples)

Action planning without metrics is just motion. Metrics without action planning are numbers with no meaning. Together, they create a feedback loop that drives learning, accountability, and adaptation.

The Workbook provides two companion tools to make this real:

- **Action Planning Table** breaks SMARTIE goals into sequenced steps with leads, partners, timelines, and resources.
- **Metrics Brainstorm** helps coalitions identify both quantitative and qualitative ways to know whether change is happening.

#### **Why This Matters**

- **Turns goals into action** Steps, leads, partners, timelines, and resources translate big goals into doable pieces.
- **Makes success visible** Metrics help the coalition see progress in ways that matter locally, not just in generic numbers.
- **Builds accountability** Shared tracking systems (spreadsheets, dashboards) keep momentum alive between meetings.
- **Strengthens equity** Community-centered metrics ensure you're measuring what matters to your place, not just what's easiest to count.

#### **Action Planning Table in Practice**

In the Workbook, coalitions use the **Action Planning Table** to break each SMARTIE goal into concrete steps. Each row captures the goal it supports, the action step, who is responsible, partners, timeline, resources, and progress status. This table becomes the coalition's living tracker — a tool to check accountability, make updates, and adapt over time.

#### **Community-Centered Metrics**

Also in the Workbook (Workshop 5 – Activity 4), coalitions brainstorm 2–3 possible metrics for each SMARTIE goal, then choose a short list of the most meaningful ones. This ensures tracking reflects **both numbers and stories** while keeping the process manageable.

#### **Examples of Metrics:**

- *Quantitative* pounds of local food purchased, number of partners engaged, SNAP/WIC acceptance added.
- *Qualitative* testimonies from producers, shifts in community trust, youth perspectives on change.

**Facilitator Tip:** Keep it light. A handful of meaningful metrics tracked consistently beats dozens of data points that no one updates.

# 3.6 Why Pause to Reflect, Celebrate, and Adapt (Optional Workshop 6)

Workbook Connection: Reflection & Celebration & Adaptation (Optional).

Coalition work is demanding. Energy ebbs and flows; contexts shift. Pausing to reflect and celebrate is not a luxury — it's a necessity for long-term resilience.

#### **Why This Matters**

- **Protects relationships** Celebrating progress honors contributions and prevents burnout.
- **Deepens learning** Reflection surfaces insights: What's working? Where are we stuck? Who's missing?
- **Resets strategy** Agreeing on 1–3 concrete adjustments ensures the coalition stays responsive instead of rigid.

**Facilitator Tip:** Build celebration into the culture. Food, art, storytelling, and gratitude rituals strengthen bonds and keep coalition work joyful.

## 3.7 Putting It All Together (The Strategic Through-Line)

By the close of Part 3, your coalition has moved from information to meaning, and from meaning to action. The sequence looks like this:

- Updated Snapshot → builds legitimacy and common ground
- Gap Plan + Power Map + Narrative Strategy → ensure outreach and communications are intentional and inclusive
- Sensemaking (Gallery Walk + Themes) → turns information into shared storylines
- Project Ideas + Transparent Prioritization → focus energy where it matters most now
- ullet SMARTIE Goals ullet align ambition with capacity and equity
- Action Plan + Community-Centered Metrics → build a learning system that sustains momentum

The Workbook shows you how to run each step. This Guide explains why each step matters — so your coalition can stay principled and clear, even as you adapt the process to fit your place.

#### Transition to Part 4

By the end of Part 3, your coalition has transformed knowledge into direction, and direction into concrete action plans. This is the heart of the coalition roadmap — where vision becomes strategy and strategy becomes work on the ground.

But sustaining momentum is just as important as launching it. Coalitions inevitably encounter obstacles — from limited capacity to competing priorities to community skepticism. *Part 4: Challenges and Solutions* prepares you for those realities, offering Montana-tested strategies for navigating barriers and keeping your coalition healthy and resilient over time.

# Part 4: Challenges and Solutions – Navigating Barriers & Sustaining Momentum

## Workbook Connections:

- Appendix A Coalition Health Tracking Worksheet (track engagement, participation, and coalition health over time)
- Appendix E Project Prioritization Matrix (align projects with resources and capacity)
- Workshop 3 Activity 3: Power Mapping & Influence Grid (ensuring diverse voices and perspectives are included)
- Workshop 6 Reflection, Celebration & Adaptation (Optional)

Launching projects and building momentum is a major accomplishment. But sustaining that momentum over months and years requires resilience. Coalitions operate in complex food system environments: members juggle competing commitments, resources are limited, and diverse perspectives can both strengthen and stretch the group.

Challenges are not signs of failure — they are the natural result of real people working together on hard things. The goal is not to eliminate them but to recognize them early, normalize them as part of coalition life, and equip your group to respond with creativity and care.

## **4.1 Engagement Fatigue**

Workbook Connection: Use Appendix A – Coalition Health Tracking Worksheet to monitor "Engagement" indicators and catch fatigue early.

**Why It Happens:** Coalitions often rely on volunteer energy. When meetings feel repetitive, visible progress is slow, or people don't see how their contributions matter, motivation dips. Fatigue is not a lack of caring — it's a signal that the coalition needs to balance work with meaning and joy.

#### Why the Strategies Work

 Rotate facilitation and decision-making roles – Sharing responsibility spreads leadership, builds new skills, and prevents burnout.

- Celebrate wins even small ones Recognition fuels energy. Joy sustains coalitions more than urgency alone.
- Design gatherings with intention Adding storytelling, food, or creative activities transforms meetings from obligations into events people look forward to.

Fig. End each gathering with a gratitude round or highlight reel. These small rituals create momentum.

#### **4.2 Resource Limitations**

*Workbook Connection: Use Appendix E – Project Prioritization Matrix to select projects that match coalition capacity.* 

**Why It Happens:** Most coalitions begin with little or no dedicated funding or staff. Food system work in particular is chronically underfunded. Meeting space, childcare, translation, and facilitation all take resources that are not always available. Without attention, scarcity can create frustration or inequity in who can participate.

## Why the Strategies Work

- Apply for small grants or in-kind donations Modest resources (snacks, printing, space) can make gatherings more accessible and enjoyable.
- Partner with schools, libraries, and nonprofits Shared capacity reduces duplication and builds community ownership.
- Use simple shared tools (spreadsheets, templates, this Workbook) Low-cost systems reduce workload and keep the focus on action, not administration.
- Build relationships with funders early Even before applying, keeping funders in the loop makes them allies for the long run.

Fig.: Remember that resources include more than money. Time, relationships, and knowledge are powerful currencies.

## 4.3 Diverse Priorities & Perspectives

Workbook Connection: See Workshop 3 – Power Mapping & Influence Grid to identify and engage stakeholders who carry both influence and trust.

**Why It Happens:** Coalitions bring together people from different sectors, cultures, and lived experiences. Each comes with their own timelines, values, and language. These differences are the coalition's greatest strength — but they can also slow trust-building or decision-making if not acknowledged directly.

Why the Strategies Work

- Revisit your shared vision often Vision serves as an anchor when differences pull in many directions.
- Use decision tools (like the Prioritization Matrix in Appendix E) Structured methods shift debate from personal preferences to transparent, agreed-upon criteria.
- Invest in skilled facilitation Ensures all voices are heard, not just the most comfortable or powerful.
- Make space for storytelling When members share why they care, differences soften and common values emerge. Narrative power reframes members as allies, not opponents.
- Rotate agenda-setting Helps ensure diverse priorities shape the coalition's work.

*§* Tip: Conflict is not failure — it's energy. Handled well, it deepens trust and leads to more durable agreements.

## **4.4 Geographic & Logistical Barriers**

Workbook Connection: Appendix A – Coalition Health Tracking Worksheet can help coalitions notice if participation is dropping unevenly (e.g., rural vs. urban members).

**Why It Happens:** In rural and Tribal contexts, distances are long, internet access may be limited, and agricultural or cultural rhythms shape when people can gather. These realities can make participation inconsistent, especially if meetings are centralized or inflexible. Food system coalitions often mirror the geography of their foodsheds — distance is real, but so is the connective tissue of shared land, culture, and food.

#### Why the Strategies Work

- Rotate in-person meeting locations or offer hybrid options Sharing the travel burden makes participation more equitable.
- Use simple communication tools (voice notes, group texts, shared docs) –
   Don't let technology barriers exclude people.
- Schedule with local rhythms in mind Align meetings with seasons, school calendars, or community events to make participation more realistic.
- Host seasonal gatherings Annual or semi-annual events re-energize momentum and reconnect dispersed members.

Fig.: Adapt coalition timelines to the realities of place instead of trying to force community life into external deadlines.

## Part 4 Wrap-Up: Embracing Challenges as Growth

Every coalition will face obstacles — not as exceptions, but as part of the journey. These challenges arise precisely because people care, because perspectives differ, and because resources are stretched in pursuit of something bigger than any one person or organization.

When coalitions name challenges openly and respond with creativity, they:

- **Strengthen trust** honesty builds confidence.
- **Deepen resilience** adapting together makes the coalition sturdier.
- **Grow capacity** every challenge navigated is a skill learned for the next phase.

In this way, challenges become practice for the very skills that sustain food system coalitions for the long haul.

## Transition to Part 5

By now, your coalition has not only built plans but also begun to anticipate the bumps ahead. The next stage is to zoom out and look at the bigger picture: how coalitions connect, inspire, and sustain action across communities and over time. **Part 5** is focused on **Monitoring, Reflection, and Evaluation** — how coalitions learn, adapt, and track progress.

## Part 5: Monitoring, Reflection, and Evaluation

Workbook Connection: Ongoing Practices (Appendix A – Coalition Health Tracking Worksheet; Appendix B – Community & Project Metrics; Appendix D – Pre/Post Survey Template)

Coalitions that thrive don't just overcome challenges — they learn from them. Monitoring and evaluation are not about grading success or filling out reports; they are about building a culture of **reflection**, **adaptation**, **and celebration**.

Evaluation flows directly from the work you've already done: your coalition's priorities, SMARTIE goals, and project plans. By tracking both outcomes and relationships, you can see what's working, notice where energy may be slipping, and make adjustments before problems grow.

Reflection also strengthens relationships: when coalitions pause to celebrate wins, share lessons, and hear each other's stories, members reconnect with their purpose and with one another.

This part of the Guide explains why monitoring matters and how to use it to strengthen both results and relationships. The Workbook provides the practical "how" — tools and activities to capture insights, check progress, and plan what's next.

In this section, you will learn how to:

- Build reflection and celebration into your coalition's rhythm.
- Track coalition health and engagement over time.
- Use pre- and post-surveys to measure growth.
- Define success through community-centered metrics.
- Learn from Montana coalitions through case studies.
- Connect your local work to statewide networks for shared strength.

#### 5.1 Reflection & Celebration as a Practice

Workbook Connection: Ongoing Practices – Activity 2: Learning Gatherings & Reflection (Appendix A – Coalition Health Tracking Worksheet)

Coalitions that endure build reflection into their rhythm. Pausing to celebrate wins — large and small — creates joy, renews energy, and reminds members why their work matters. Celebration is not an afterthought; it is fuel for long-term resilience.

Reflection also turns experience into learning that belongs to the whole group. Your Workbook includes prompts in the Coalition Health Tracking Worksheet to help structure these reflections. Using those prompts ensures lessons are captured consistently and can be revisited over time. Without intentional pauses, coalitions risk repeating mistakes or overlooking breakthroughs. With reflection, members see the bigger picture: how far they've come, what needs to shift, and what opportunities are emerging.

#### **Why This Matters**

- **Energy** Gratitude and celebration keep coalitions vibrant, even during challenges.
- **Learning** Reflection surfaces insights that lead to smarter choices next time.
- **Trust** When members share lessons and stories, relationships deepen and commitment grows.

#### How to Do It

- Host seasonal "learning gatherings" where reflection and celebration are blended.
- Use prompts from the Workbook to capture what worked, what didn't, and what was surprising.
- Share stories of progress with the broader community to build visibility and trust.

**Fip:** Ritualize it — end meetings with a gratitude round, create a "highlight reel," or celebrate milestones with food and storytelling. Small, consistent practices build a culture of reflection.

## **5.2 Tracking Coalition Growth and Engagement**

Workbook Connection: Ongoing Practices – Activity 1: Coalition Health & Progress Tracking (Appendix A – Coalition Health Tracking Worksheet)

Healthy coalitions evolve over time. Tracking coalition health helps members see how the group is doing, celebrate progress, and make adjustments before small issues grow into big ones. This isn't about giving the coalition a grade — it's about creating a shared picture of what's working well and where more support may be needed.

#### Why This Matters:

- **Visibility** Regular check-ins make invisible dynamics (like slipping participation or uneven leadership) visible early.
- **Fairness** Tracking helps ensure responsibilities and opportunities are shared across members, not concentrated in just a few.
- Adaptation By spotting trends, coalitions can shift course before energy fades or key voices drop out.

#### What to Track:

- **Representation & Inclusion** Are diverse sectors and voices showing up?
- **Engagement & Participation** Are people attending regularly and contributing meaningfully?
- **Leadership & Roles** Is responsibility distributed fairly? Are new leaders emerging?
- **Relationships & Collaboration** Are partnerships deepening or new ones forming?
- **Resources & Alignment** Do the group's time, funding, and assets support its chosen priorities?
- **Communication & Clarity** Do members understand decisions and next steps?
- **Impact (for mature coalitions)** Are tangible changes happening in policy, practice, or community outcomes?

The Workbook's Coalition Health Tracking Worksheet provides space to capture these indicators seasonally. It keeps a visible record of coalition health over time, helping your group see both progress and gaps

#### **How to Measure It:**

• Seasonal check-ins with the Coalition Health Tracking Worksheet.

- Surveys, interviews, or informal story collection with members.
- Observation of meetings, participation, and collaboration.

*♀* Tip: Match what you track to your coalition's stage (developing, established, mature). Keep it simple — a few indicators tracked consistently go further than a long list no one updates.

#### 5.3 Conducting Pre- and Post-Surveys to Track Growth

*─* Workbook Connection: Appendix D – Pre/Post Survey Template

Surveys help coalitions measure shifts in knowledge, confidence, or readiness over time. They are especially useful for showing progress across a season, project, or year — providing evidence of impact and feedback on what the group needs next.

## **Why This Matters**

- **Evidence of Impact** Surveys show how participation changes people's understanding, confidence, or networks.
- **Feedback Loop** They reveal what members or participants want to learn or focus on next.
- **Credibility** Results strengthen reports, grant applications, and updates to the community.

Your Workbook includes a ready-to-use Pre/Post Survey Template. You can adapt it to your coalition's goals, making it easy to gather comparable data across a project, season, or year.

#### **Tips for Success**

- Keep surveys short (5–7 questions) and easy to complete.
- Offer multiple formats (online, paper, verbal) to increase accessibility.
- Include at least one open-ended question to capture stories or unexpected insights.
- Share results back with the coalition and community visibility builds trust.

**Fip:** Use the Workbook's Pre/Post Survey Template as a starting point and adapt it to your coalition's goals.

## **5.4 Defining Success Through Community-Centered Metrics**

Success is more than completed projects — it's about impact, inclusion, and alignment with community values. The most meaningful metrics are those defined by the coalition itself, not imposed externally. Community-centered metrics build directly on your coalition's SMARTIE goals from Workshop 4. Each goal should have a handful of metrics that make progress visible in ways that matter locally.

#### Why This Matters:

- **Relevance** Metrics tied to local priorities feel real and keep members engaged.
- **Equity** When communities define what "good" looks like, they ensure benefits are shared fairly.
- **Accountability** Community-centered metrics make the coalition answerable to the people it serves, not just to funders.

Community-centered metrics build directly on your coalition's SMARTIE goals from Workshop 4. Each goal should have a handful of metrics that make progress visible in ways that matter locally.

#### **How to Define Metrics:**

- Start with your coalition's SMARTIE goals.
- Choose a mix of quantitative (e.g., acres in sustainable production, dollars in local purchasing, meals served) and qualitative (stories, testimonials, observed changes in trust).
- Keep the list realistic: 5–7 metrics that can be tracked annually.
- Use Appendix B for inspiration.

## 5.5 Case Studies: Community-Led Approaches to Food System Transformation

Workbook Connection: Supplemental Examples (not a formal Workbook activity)

Real-world examples from Montana (Helena, Fort Belknap, Billings) illustrate how coalitions apply these tools, adapt to challenges, and measure impact in ways that fit local context.

- **Helena**: Built momentum by embedding food work in broader resilience planning.
- **Fort Belknap**: Grounded coalition processes in Indigenous values and adapted to geographic constraints.
- **Billings**: Increased visibility and markets for local producers through public-facing campaigns.

**Takeaway:** Case studies aren't just success stories — they are roadmaps. Adapt the lessons that resonate with your coalition's place and people.

You can use these case studies alongside your Workbook activities as inspiration. When drafting goals, action plans, or metrics, notice which strategies feel adaptable to your own coalition's place and context.

## Coalition Impact at a Glance — Montana Example

(Use this as inspiration for your own coalition's snapshot in Workshop 6.)

- **3** community coalitions launched and supported (Helena, Fort Belknap, Billings)
- 250+ stakeholders engaged across all three communities
- 2 major community-wide food events in Helena
- 3 cross-sector campaigns or projects initiated
- **100%** increase in coalition confidence (Billings pre/post survey)

## Helena: Community Ownership and Cross-Sector Resilience

What began as a nine-month community food system assessment became a catalyst for long-term, cross-sector collaboration. Producers, healthcare leaders, educators, food businesses, local government, food access entities and nonprofits

came together, eventually nesting their food systems work within *Resilient Helena*, an existing community nonprofit with a broader resilience strategy connecting food to climate, housing, and public health.

#### **Highlights**

- Completed Helena's first-ever community food system assessment
- Hosted two "Longest Table" events blending food, health, and dialogue each drawing 100+ participants
- Developed and prioritized 33 project ideas, selecting one community-wide local food and wellness event series to implement

#### **Key Takeaways**

- A community-centered launch was a turning point for momentum
- Clear roles, aligned values, and consistent facilitation sustained engagement
- Embedding food work in broader resilience planning increased staying power

## Try This in Your Community

- Launch with a public event that combines food, storytelling, and dialogue
- Prioritize projects using clear community-driven criteria
- Align food system work with broader local plans (e.g., climate, health, housing)

Fort Belknap: Building Food Sovereignty through Relationship and Adaptation

Fort Belknap adapted the CFSA model to local realities: limited staff capacity, geographic distance, and the need to ground the work in Indigenous values. The coalition built trust, sustained engagement through virtual meetings, and revived community conversations on traditional foodways and sovereignty.

## Highlights

- Conducted a culturally relevant assessment comparing 2017 and 2023 food sovereignty data
- Maintained engagement despite staffing transitions through virtual formats and outreach at cultural events
- Co-designed a fully funded subterranean geothermal greenhouse, construction beginning September 2025

#### **Key Takeaways**

- Flexibility in format sustains participation
- Cultural grounding strengthens relevance and commitment
- Relationship-based facilitation builds trust and long-term engagement

## Try This in Your Community

- Integrate local culture and values into your coalition process
- Use hybrid or mobile meeting formats to reach dispersed participants
- Ground project priorities in existing community knowledge and history

## **Billings: Visibility and Voice for Local Producers**

After early challenges with coalition consistency, Billings gained traction by focusing on public-facing initiatives that celebrated local producers and connected them to new markets.

#### **Highlights**

- Completed a community food system assessment, identifying strengths and gaps in food system literacy
- Launched "Taste the Agri-Culture of Billings" a printed and digital food destination map featuring 40+ local producers, restaurants, composters, and processors
- Increased institutional interest in sourcing locally

## **Key Takeaways**

- Public campaigns can re-energize coalitions and raise community awareness
- Producer visibility builds credibility and market opportunities

## Try This in Your Community

- Create a "local food map" or directory highlighting producers and businesses
- Use CFSA results to design an awareness campaign
- Pair public engagement with producer-focused market development efforts

#### **Shared Lessons Across Communities**

From Helena to Fort Belknap to Billings, a few patterns stand out:

- Hidden assets become visible through coalition work
- Local capacity (project management, coordination) drives momentum
- **Integration** with existing resilience or planning efforts increases longevity

Producer involvement boosts credibility and market reach

## 5.6 Connecting Statewide: Strength in Shared Effort

Coalitions don't have to work in isolation. Local work is amplified when connected to others across the state.

#### Why It Matters:

- Shared learning Exchanging tools and stories prevents duplication.
- Collective influence Policymakers and funders listen differently when many communities speak together.
- Resilience Peer support sustains coalitions through transitions and setbacks.

#### **Quick Start:**

- Join a statewide listserv or peer-learning network.
- Pair with another coalition for quarterly check-ins.
- Share one tool, story, or update each season.

## **Opportunities to Explore**

- Attend regional gatherings or producer roundtables
- Co-develop multi-community grant proposals or policy campaigns
- Use shared tools and resources like:
  - o <u>AERO's Get to Know Your Food System</u> video storytelling series
  - Abundant Montana's <u>Find Food and Farm Map</u>
  - o Peer mentorship between new and experienced coalitions

## Part 5 Wrap-Up: Building a Learning Coalition

By integrating reflection, tracking, and evaluation into its rhythm, a coalition becomes more than a group that launches projects — it becomes a **learning coalition**. Monitoring progress, celebrating wins, and adapting to challenges strengthen both outcomes and relationships.

The key is consistency: tracking a few indicators, capturing stories, and sharing results back with members and the community. Over time, these practices build

trust, sustain energy, and show that the coalition is accountable not only for what it does, but for how it works together.

Think of evaluation not as an end point, but as part of a continuous cycle: act  $\rightarrow$  reflect  $\rightarrow$  adapt  $\rightarrow$  act again. This ongoing practice ensures that your coalition remains resilient, responsive, and rooted in community values.

#### Transition to Part 6

By embedding reflection, coalition health tracking, surveys, and community-centered metrics into your rhythm, your coalition creates a culture of continuous learning and adaptation. These practices make progress visible, strengthen accountability, and ensure that your work remains relevant to the people and places you serve.

Part 6: Conclusion brings the journey full circle. It reflects on the bigger picture of coalition work, lifts up key lessons, and connects your local efforts to the statewide and national movements shaping the future of food systems.

## **Part 6: Conclusion - Stepping Forward Together**

**Workbook Connection:** This section does not have a direct Workbook counterpart. Use Ongoing Practices and Appendices as touchpoints for sustaining coalition work.

Over the course of this Guide, we've explored how to build and sustain community-rooted coalitions — from the first invitation to the table, to launching projects, to adapting and thriving through challenges.

This work is not only about forming a "coalition." It's about **building relationships strong enough** to carry hard conversations, complex projects, and ambitious dreams. It's about neighbors becoming collaborators, and collaborators becoming the heartbeat of local change.

Food system transformation rarely happens all at once. It grows — in the soil, in kitchens, in town halls, and in the quiet persistence of people showing up for one another.

#### **Imagine this:**

- Every household in your community has access to fresh, culturally meaningful food.
- Local farmers, ranchers, and food workers are thriving not just surviving.
- Decisions about your food system are made by the people who live and work there, with care for future generations.
- Communities across your region are linked in a web of shared learning, action, and celebration.

This future is not far-off — it is already being built in Helena, Fort Belknap, Billings, and in communities like yours.

## Your coalition is part of something bigger.

Each step — hosting a workshop, mapping local assets, prioritizing projects — contributes to a **growing movement of communities shaping their own food futures**. Every action adds to the momentum.

## A practical next step

As you close this Guide, your **Workbook remains open**. The Ongoing Practices and Appendices are designed as living tools:

- Use Appendix A Coalition Health Tracking Worksheet to monitor coalition growth.
- Revisit Appendix B Community & Project Metrics to measure what matters most.
- Draw on **Appendix D Pre/Post Survey Template** to capture learning and growth.

A natural starting point is to schedule your first **seasonal reflection gathering**. This simple step grounds your coalition in learning, joy, and renewal.

## Closing the circle

The *Gathering Table* isn't just a metaphor — it's an ongoing invitation. Each meeting, meal, and milestone adds another seat, another story, another reason to keep showing up together.

As you plan your next gathering, remember:

- You are not alone. Others are doing this work alongside you.
- You already have what you need. The assets live in your people, your place, and your stories.
- You can start today. One conversation. One shared meal. One step toward your vision.

Let's keep setting the table — open to every voice, every story, every hand willing to help. Because when we feed connection, we feed resilience. And together, we grow communities where food is local, abundant, and rooted in care.

#### The table is waiting.