

The Gathering Table

Coalition Workbook

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To be used with:

[The Gathering Table: A Guide for Building Food System Coalitions](#)

[The Gathering Table: Facilitator's Companion](#)

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The Gathering Table Coalition Workbook

A Workbook to accompany the Gathering Table Main Guide & Facilitator Companion

Purpose: The Coalition Workbook is your coalition's shared place to record decisions, agreements, priorities, and action steps so nothing gets lost and everyone stays on the same page. Think of it as your coalition's **living record** — a memory bank you can return to for clarity, alignment, and accountability.

How It Fits with Other Tools

Tool	Purpose	Connection
Main Guide	Explains the <i>why</i> and <i>what</i> of coalition building	Use it to understand context and best practices
Facilitator Companion	Gives step-by-step instructions for running each workshop	Use it to lead meetings effectively
Coalition Workbook	Records your coalition's agreements, goals, and plans	Fill it out during workshops to capture outcomes

Together, these three tools ensure your coalition stays aligned, inclusive, and action-focused.

How to Use the Workbook

- **Bring it every time** – Keep it open during all coalition meetings and workshops.
Match pages to workshops – Each workshop in the Facilitator Companion has a corresponding Workbook section.
- **Rotate the note-taker role** – Keeps documentation shared and inclusive.
- **Write clearly and date entries** – Makes it easy to look back and understand.
- **Review often** – Check the Workbook before planning new actions to stay on track.

When to Use

- **During meetings** – Record decisions, agreements, and next steps.

- **During workshops** – Capture ideas from group activities, visioning, and goal-setting.
- **Between meetings** – Add updates on progress, changes, or new opportunities.

Pro Tips

- Treat the Workbook like a **memory bank**: it holds the coalition’s history and agreements.
 - Don’t cram — if space runs out, attach additional pages or link to shared documents.
 - Make it accessible to everyone — store digitally in a shared folder and/or keep a printed copy at meetings.
 - Remember: **The Guide and Companion keep you on track. The Workbook keeps you together.**
-

Workshop 0 – Coalition Foundations & Pre-Work

 **Main Guide Reference:** *The Gathering Table, Part 0*

Estimated Total Time: 2–3 hours (can be split over multiple shorter sessions)

Purpose: Workshop 0 lays the groundwork before the broader coalition launch. It ensures your coalition starts with clarity, inclusivity, and momentum by clarifying purpose, identifying representation gaps, planning outreach, orienting to the Community Food System Snapshot Tool, and preparing the launch event.

This session is usually held with a small “planning group” (1–5 conveners). These conveners hold early energy and vision but are not permanent decision-makers.

By the end of this session, you will have:

- Drafted why the coalition is forming and what success looks like.
- Mapped who needs to be at the table and identified missing voices.
- Created an outreach and invitations plan.
- Oriented to and started the Community Food System Snapshot Tool.
- Drafted a flow and agenda for your coalition’s launch event.

Activity 1 – Clarify Your Coalition’s Purpose (20-30 Mins)

 See Guide Section 0.1 for why clarity of purpose builds legitimacy and momentum.

Purpose: Define why the coalition is forming and what success will look like in the community food system.

1. Individual Reflection (5 min)

Prompt participants to jot quick answers to:

- Why are we starting this coalition?
- What change do we hope to see in our community food system?
- What does “success” look like for us in 3–5 years?

2. Small Group Share (5–10 min)

In pairs or trios, share reflections and note common words/phrases.

3. Whole Group Synthesis (10 min)


- Capture the common words/phrases on a flipchart or digital doc.
- Cluster similar ideas (e.g., “access,” “fairness in availability,” “healthy food” → “fair food access”).
- Draft a rough sentence starter together:
 - “Our coalition exists to...”
 - “...so that...”

4. Draft Purpose Statement (5 min)

Use one of these **templates** to quickly shape the notes into a clear draft:

1. **Impact-Oriented:** *Our coalition exists to [do what action] in order to [achieve what impact] for [who/where].*
2. **Values-Oriented:** *We are a coalition of [who/partners] committed to [core values or vision] so that [desired outcome].*

Output: 1–3 sentence *draft coalition purpose statement* written on chart paper or saved in the Workbook.

 **Tip:** This draft doesn't need to be perfect. It can (and should) be revisited after the Coalition Launch (Workshop 1) to include input from the full group.

Activity 2 – Initial Coalition Outreach: Inviting People to the Table (45 Mins)

 See Guide Section 0.2 for why inclusive representation strengthens coalitions.

Purpose: Map who needs to be at the table across all food system sectors, demographics, and power/decision-making roles. Ensure coalition membership is diverse, inclusive, and representative of the whole food system.

Use this [Coalition Tracking document](#) to keep notes and information on Coalition Members.

- 1. Reflect & Discuss (15 min):** Use these guiding questions to surface who should be included:

Representation & Inclusion

- Who is directly affected by the food system challenges we're addressing?
- Who has lived experience that could guide the coalition's work?
- Who has been excluded from these conversations in the past, and how will we change that?
- Do we have representation from across the food value chain? (Cultivation & Harvesting, Processing & Transformation, Aggregation & Distribution, Purchasing & Nourishment, Conservation & Stewardship)
- Do we have a range of ages, identities, and lived experiences represented?

Power, Influence & Reach

- Who in the community is a trusted connector?
- Who holds decision-making power over resources, policies, or programs that impact the food system?
- Who could bridge different sectors or communities?

Commitment & Energy

- Who has the time and interest to actively participate?

- Who has shown sustained interest in food system work?
- Who can mobilize others into action?

Skills, Knowledge & Expertise

- Who has technical or sector-specific expertise we need?
- Who brings strong facilitation or communication skills?
- Who has on-the-ground farming, food business, or food access experience?

2. Sector Representation Checklist (15 min)

Mark all sectors that are currently represented by someone in your coalition:

- ☐ Producers – farmers, ranchers, gardeners, foragers, fisherfolk
- ☐ Food processing / Value-added – small food manufacturers, butchers, bakers
- ☐ Distribution – aggregators, food hubs, transportation/logistics
- ☐ Retail / Food service – grocery, co-ops, restaurants, caterers
- ☐ Institutional buyers – schools, hospitals, corrections, tribal programs
- ☐ Food access organizations – food banks, mutual aid, mobile markets
- ☐ Health and nutrition – clinics, dietitians, public health staff
- ☐ Environmental & conservation – land trusts, watershed groups, conservation districts
- ☐ Policy & government – city/county officials, agency staff (Extension, SNAP-Ed, NRCS, FSA, Tribal governance)
- ☐ Education & youth – teachers, FFA/4-H leaders, afterschool coordinators, youth council members
- ☐ Cultural /community leaders – elders, tribal leaders, immigrant/refugee advocates, faith-based leaders
- ☐ Consumers / eaters – especially those with lived experience of the challenges

3. Gap Analysis (15 mins)

- Who is already at the table?
- Who is missing?
- Which sectors are over-represented?
- Which sectors are under-represented?
- What is our plan to recruit missing voices?

Output: Completed representation checklist, gap notes, and initial recruitment plan.

Tip: You don't need to complete this exhaustively in one session. Capture what you can, then return as new members join and new voices are identified. Treat this as a "living map" of representation that evolves with the coalition.

Activity 3 – Introducing the Idea (45 Mins)

 See Guide Section 0.3 for why intentional invitations shape coalition culture.

Purpose: Develop inclusive, welcoming strategies to invite diverse community members.

Prompts:

- Who will reach out to whom, and how?
- What is our "elevator pitch" or invitation message?
- How will we ensure invitations are inclusive and welcoming?

Example Messaging:

- "We're imagining a more available, resilient food system — where food nourishes our community, land, and local economy. We'd love for you to be part of it."
- "We're forming a coalition to connect people working across food, health, education, and the environment. Want to join us?"
- "What would make you feel proud of our community's food system 10 years from now? We'd love to hear your vision."
- "Everyone has a role in our local food system — and your voice matters."

Our Messages/Elevator Speech: Fill in the space below with what your coalition decides to use/say.

Our Outreach plan: Use this [Coalition Tracking document](#) to keep notes and information on Coalition Members and how you will connect with them.

Activity 4 - Pre-Launch Data Scan: Preparing for the Snapshot (30–40 Mins)

 See Guide Section 0.4 for why the Snapshot builds common ground and legitimacy.

Purpose: To familiarize conveners with the Community Food System Snapshot Tool and begin using it as a structured way to gather both secondary data (reports, statistics) and community knowledge (stories, observations).


- What reports, articles, or datasets do we already have?
- What do we notice about strengths, gaps, or trends?

Output: Initial notes in the [Community Food System Snapshot Tool](#)

1. Tool Walkthrough (10–15 mins)

- Open the Snapshot Tool and review its layout: five food system sectors (Cultivation & Harvesting, Processing & Transformation, Aggregation & Distribution, Purchasing & Nourishment, Conservation & Stewardship) and supporting assets.
- Explain that each row/section is a **prompt** for the coalition to evaluate: What do we know? What do we not know yet? What do we want to ask community members later?
- Emphasize that this is a **living document** that will grow throughout Workshops 2–3.

2. Data Source Brainstorm (15–20 mins)

 **Tip:** Start with 3–5 key sources that give a strong baseline. Remember: the Snapshot is a *living tool*, not a comprehensive report.

Introduce common data sources coalitions can start with, including the following.

- **Cultivation & Harvesting:**
USDA Ag Census, NRCS reports, Extension bulletins, grower directories, FSA records, crop insurance data, seed & input supplier data, irrigation district reports, soil surveys, organic certification lists, grazing allotment maps.
- **Processing & Transformation:**
Dept. of Ag reports, food safety agencies, processor directories, licensing & inspection data, value-added product registries, slaughter/processing plant capacity data, cottage food licenses, wastewater permits, food business incubator records.

- **Aggregation & Distribution:**
Food hubs, co-ops, trucking networks, vendor lists, distributor directories, cold storage facility inventories, warehouse/terminal market maps, rail freight data, postal or delivery service coverage, logistics association reports.
- **Purchasing & Nourishment:**
Farmers market data, grocery/retail scan data, institutional procurement records, school meal program purchasing data, SNAP/WIC redemption by outlet, Double SNAP/food incentive program reports, CSA membership lists, restaurant/local sourcing surveys, community food pantry inventory/use data.
- **Conservation & Stewardship:**
Health department community health assessments, SNAP/WIC participation & food security reports, conservation district plans, NRCS EQIP/CRP participation data, watershed & rangeland health reports, tribal natural resource plans, climate resilience assessments, pollinator habitat and biodiversity surveys.
- **Cross-Cutting:**
City/county/state planning documents, economic development strategies, labor stats, policy inventories, land & water use plans, workforce training program data, education program evaluations, philanthropy/funding landscapes, demographic/equity indicators, historical/cultural archives.

Have participants add any **known local sources** directly into the tool (or on sticky notes if working offline).

3. Practice Entry (10–15 mins)

As a group:

1. Pick **one sector tab** (e.g., Production).
2. Enter 2–3 data points (e.g., # of cattle operations, # of farms selling direct).
3. Use the “Notes” or “Gaps” column to capture what’s missing or unclear.

4. Identify Immediate Next Steps (5–10 mins)

- Highlight sectors with clear **data gaps** that need coalition follow-up.
- Assign 1–2 conveners to gather additional secondary data before Workshop 1 - Coalition Launch.

Outputs:

- Conveners oriented to the Snapshot Tool.
 - First entries made in at least one sector.
 - A short list of priority data sources to gather before Workshop 2.
-

Activity 5 – Coalition Launch Plan (40 Mins)

 See Guide Section 0.5

Purpose: Design the launch event where the full coalition will gather for the first time.

Discuss and record information on these questions:

- What is the purpose of the Coalition Launch gathering?
- Who are we inviting (and why)?
- What story or context will we open with?
- What activities will build connection and trust?
- What information should be shared (logistics, next steps, etc.)?
- What roles do we need for the gathering? (facilitator, note-taker, greeter, etc.)
- What supplies or materials do we need?
- How will we follow up after the gathering?
- Where and when will we meet?
- Will food, childcare, stipends, or translation be provided?
- Who will facilitate the gathering?
- Do we want to gather feedback about the event?

Coalition Launch Details:

Date/Time: _____

Location/Virtual Link: _____

Food/Refreshments: _____

Accessibility Supports: _____

Draft Coalition Launch Agenda

- Welcome + Land Acknowledgment (10 min)
- Introductions + Icebreaker (15 min)
- Purpose of the Gathering (10 min)
- Story Circle or Sharing Activity (20 min)
- Visioning Activity (*Workshop 1*) – 30 min (*leave blank in this agenda for now*)
- Group Agreements (*Workshop 1*) – 15 min (*leave blank in this agenda for now*)
- Logistics + Next Steps (10 min)
- Close + Gratitude (10 min)

Transition to Workshop 1: Now that you have your coalition launch plan in place, you're ready to bring your broader group together. Workshop 1 is where the full coalition will gather for the first time to build relationships, create a shared vision, and establish values and group agreements that will guide your work together.

Wrap-Up & Next Steps (10–15 mins)

 *Guide Reference: Part 0 – Getting Started*

 *Workbook Reference: Workshop 0 – Activities 1–5*

Purpose: To close the pre-launch session with clarity, inspiration, and specific commitments that prepare the convening group for the Coalition Launch.

What to Do:

- **Confirm Assignments (3–4 min):** Revisit outreach, data follow-ups, and launch logistics. Ensure everyone knows their role and deadlines. Write them where all can see (flip chart or shared doc).
- **Encourage Outreach (2–3 min):** Ask participants to begin reaching out to community contacts using the invitation messages developed today. These early conversations help build momentum and inclusivity.
- **Remind About Data Scan (2–3 min):** Encourage conveners to bring any relevant reports, articles, or datasets that could inform the Coalition Launch and later Snapshot work (e.g., surveys, state/local food reports, informal notes).
- **Preview Workshop 1 – Coalition Launch (1–2 min):** Let the group know that the next gathering is the Coalition Launch. At that session, the full

coalition will meet to build relationships, create a shared vision, and establish group agreements.

- **Close with Reflection (2-3 min):** Invite one participant to share a takeaway or story about why this work matters, so the group ends grounded in purpose.

Output:

- Clear expectations for outreach, data gathering, and launch planning.
- Assignments confirmed with deadlines.
- Energy and purpose carried forward into **Workshop 1: Coalition Launch.**

Workshop 1 - Coalition Launch

 *Guide Sections: 1.1.1–1.1.3 (Vision, Values, Agreements)*

 *Estimated Time: 2.5–3 hours*

Purpose: To launch the coalition by connecting members, co-creating a shared vision, and establishing values and agreements for how the coalition will work together. This session is about inspiration, trust-building, and laying relational and cultural foundations.

Coalition Introduction

1. Welcome & Land Acknowledgment (15 min)

Purpose: Set an inclusive, respectful tone and ground the session.

- Welcome everyone, review the agenda, and set a collaborative tone.
- Offer a land acknowledgment connected to food, stewardship, and local history.
- Encourage gratitude for the place and the people gathering

2. Story, Introductions & Icebreaker (25 min)

Purpose: To begin building our coalition by hearing the story of why we are gathering, connecting to our place, and introducing ourselves to one another.

Steps:

- **Hear the story:** Share how the coalition came about and why it matters now.
- **Connect to place:** Reflect on the land, its caretakers, and local food traditions.
- **Introduce yourself:** Name, role in community (formal/informal), and one food that represents your connection to this place.
- **Guidelines:** Review group participation norms for the session.

Reflections:

- Something that stood out to me from the story...
- People I met today and what I learned about them...

- One food connection that inspired me...

3. Coalition Purpose Overview (20 min)

Purpose: Revisit the “why” of the coalition and link it to members’ motivations.

- Present draft coalition purpose from planning team (if one exists).
- Invite members to reflect on why they came today and what drew them in.
- Connect those motivations back to the coalition’s larger goals.

Output: A shared baseline understanding of coalition purpose.

Activity 1 – Visioning a Thriving Local Food System (40 min)

 See Guide Section 1.1.1 Clarifying Purpose and Shared Vision

Purpose: Co-create a shared picture of success 10 years from now.

Set the Stage (5 min)

- Invite participants to close their eyes and imagine what success looks like in 10 years if the coalition is wildly successful.
- Prompt them to use their senses: *What do you see, hear, smell, taste, or feel in your community’s food system?*

Creative Visioning Methods (15 min): Choose 1 or 2 of the following to do together.

Option 1: Postcards from the Future

- **Format:** Individual or small group writing/drawing
- **Prompt:** It’s the year 2035, and your community food system is thriving. Write a postcard to someone in the present describing what you experienced. What do you see? Hear? Smell? Who is there? What feels different?
- **Materials:** Index cards or printed postcard templates, pens/markers
- **Why it works:** Emotionally engaging and story-rich; great icebreaker

Option 2: Soundscape of an Accessible Food Future, Available to everyone

- **Format:** Group brainstorm or creative exercise
- **Prompt:** Imagine you just woke up in a vibrant, healthy food system. What sounds do you hear? Farmers chatting? Kids playing? Music at the market? Describe or mimic these sounds.
- **Materials:** Optional: sound clips or speaker
- **Why it works:** Invites multisensory engagement and group bonding

Option 3: Seed Packets from the Future

- **Format:** Drawing/writing + metaphor
- **Prompt:** Design a seed packet for one idea, project, or value that you hope to plant in our community food system. What is the seed called? What does it grow into? How should it be cared for?
- **Template includes:**
 - Name of the seed
 - Description of what it becomes
 - Care instructions: what it needs to thrive
- **Why it works:** Fun, metaphorical, and easily displayed as art or posters

Option 4: Patchwork Futures Quilt

- **Format:** Group mural or modular collage
- **Prompt:** Imagine one scene from a thriving food system of the future—a garden, a meal, a farm, a food co-op. Illustrate that scene on your own 'quilt square.' Then combine everyone's squares to make a community vision quilt.
- **Materials:** Paper or fabric squares, markers, tape or pins
- **Why it works:** Collaborative, visual, and inclusive

Option 5: Future Farmers' Market Booth

- **Format:** Small group role-play or visual storytelling
- **Prompt:** Create a mock 'farmers' market booth' from the year 2035. What are you selling? Who is there? What story are you telling? Use signs, visuals, or props to bring it to life.
- **Materials:** Props, paper, presentation space
- **Why it works:** Embodied, theatrical, and high energy; great for youth and adults

After the Visioning Activity – Making It Actionable:

- **Gallery Walk or Show-and-Tell (10–15 min):** Display artifacts and invite discussion.
- **Identify Common Themes (15–20 min):** Capture repeated ideas/images. Cluster them into themes.
- **Draft a Shared Purpose Statement (Optional – 20–30 min):** Using these themes, craft a short statement of purpose that connects vision to present action. Example prompt:

“Because we imagine a food system in 2035 that is ____, ____, and ____, our coalition exists today to ____.”

Outputs

- A set of 6–10 raw creative products (postcards, sketches, quilt pieces, etc.).
- A list of **3–5 emerging themes** that describe the coalition’s vision for the food system.
- Notes that can be distilled into a **draft coalition purpose statement** (refined later in Guide Section 1.2).

***Tip:** Don’t aim for perfection—the draft purpose can evolve, but writing something down now builds momentum.*

Activity 2 – Coalition Values (20 mins)

***Main Guide Reference:** Section 1.1.2 – Defining Coalition Values*

Purpose: To surface and define the coalition’s core values. These values guide decision-making, communication, and collaboration. They help ensure that the coalition’s actions reflect its purpose and build trust among members.

- **Individual Reflection (5–10 minutes)**
 - Ask participants:
 - What values do you want this coalition to embody as we work together?
 - What values help you feel included and energized in group work?
 - What should this coalition be known for?
 - What do you need to feel respected and heard?

- Encourage them to write down 3–5 words or short phrases (e.g., inclusion, fair access, innovation, transparency, stewardship, respect for land).
 - Use an online list of values for prompt and Dare To Lead list of values.

Your Responses:

2. Small Group Sharing (10–15 minutes)

- Break into small groups of 3–4 people.
- Each participant shares their list.
- Groups cluster overlapping ideas and note commonalities.

Group Notes:

3. Whole Group Clustering (10–15 minutes)

- The facilitator invites each group to share top 2–3 values.
- Write these on a flip chart or digital board.
- Combine duplicates and begin clustering similar values together.

Clusters and Theme Words:

4. Finalize Your Coalition Values (10 minutes)

As a group, choose 4–6 core values that feel most essential. Write a short, shared definition for each one that reflects how it shows up in action.

Core Value	Definition (in action)

What to Do With Your Values

- Post them at every meeting or include them on the first slide of your agenda.
- Refer to them during decision-making or when challenges arise.
- Use them to onboard new coalition members.
- Revisit them annually to check alignment or refresh if needed.

Tip: Create a visual version of your Coalition Values Statement to share in newsletters, websites, or presentations.

Outputs

- A coalition-agreed list of **4–6 core values**.
- Draft working definitions that can be finalized in the coalition guidebook or shared materials.
- A values poster/visual (optional) to bring into future workshops as a touchstone.

Activity 3 – Group Agreements (15-25 mins)

Main Guide Reference: Section 1.1.3 – Developing Group Agreements

1. Framing (3 min)

- The facilitator explains: *“Agreements help us create a safe and productive space. They are not rules imposed from outside, but commitments we make to one another to support trust and collaboration.”*
- Share 2–3 sample agreements (e.g., “step up, step back,” “assume good intent, attend to impact,” “one mic, many voices”).

2. Individual Brainstorm (3 min)

- a. Ask participants to think about past experiences in groups.
- b. Prompt: *"What helped those groups work well together? What would you want to avoid here?"*
- c. Each participant jots down 2–3 possible agreements.

3. Small Group Clustering (5 min)

- a. In groups of 3–4, participants share their brainstormed agreements.
- b. Groups choose their top 2–3 agreements to bring forward.

4. Large Group Synthesis (7 min)

- a. Facilitator records group suggestions on a flip chart or digital board.
- b. As a whole, cluster overlapping agreements and reword them so they are clear and concise.
- c. Aim for 5–10 agreements total.

5. Check for Consensus (2 min)

- a. Read the full list aloud and ask: *"Can we commit to these agreements as a coalition?"*
- b. Adjust wording if needed until there is clear consensus.

Examples of common agreements:

- Speak from personal experience; use "I" statements.
- Step up, step back (share airtime).
- Assume good intent, attend to impact.
- Expect and respect non-closure.
- Practice active listening.

Outputs


- A finalized list of **5–10 group agreements**, written in accessible, positive language.
- Agreements documented in coalition materials and re-posted at future meetings.
-

Our Coalition's Group Agreements:

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-
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-

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Activity 4 – Snapshot Mini-Orientation & Homework (15–20 mins)

 *Guide Section: 1.3 (Shared Understanding)*

Purpose: Provide coalition members with a quick introduction to the Community Food System Snapshot Tool so they understand its structure and purpose. This sets up “homework” assignments to gather baseline information before Workshop 2.

1. Introduce the Tool (5 min)

- Explain the Snapshot Tool as the coalition’s shared “living record” of the food system.
- Review the five sectors:
 - Cultivation & Harvesting
 - Processing & Transformation
 - Aggregation & Distribution
 - Purchasing & Nourishment
 - Conservation & Stewardship

2. Walk Through Structure (5–10 min)

- Show how each sector sheet includes:
 - *Strengths/Great Things* (what’s working well)
 - *Questions/Gaps* (what’s missing, uncertain, or challenging)
 - *Stakeholders to Connect With* (people/orgs who should be at the table)
 - *Secondary Data Sources* (reports, datasets, directories)
- Emphasize that both numbers (data) and stories (lived experience) belong here.

3. Homework Brief & Assignments (5 min)

- Each participant chooses (or is assigned) a sector.
- Before Workshop 2, add at least:

- 1 strength/great thing about the local food system.
- 1 question or gap you notice.
- 1 stakeholder or data source to include.
- *Optional:* add a short story or example that illustrates one of your points.
- Clarify process for recording (digital link or shared document).

Outputs:

- Coalition members oriented to the Snapshot Tool.
- Each person leaves with a clear assignment to contribute data, voices, or stories before Workshop 2.
- A stronger starting point for the Deep Dive in Workshop 2.

Wrap-Up & Next Steps (10–15 mins)

 *Guide Reference: Part 1 – Coalition Launch*

 *Workbook Reference: Workshop 1 – Activities 1–5*

Purpose: To leave the coalition with clarity on what was created today and clear direction for preparing the next stage of work.

What to Do:


- **Review Outputs (3–4 min):** Recap the coalition’s draft purpose statement, agreed values, and group agreements. Write or project them so everyone leaves with a shared memory of the work accomplished.
- **Confirm Assignments (3–4 min):** Review who is responsible for gathering data, stories, or observations for the Community Food System Snapshot. Encourage people to pair up to share the workload.
- **Encourage Engagement (2–3 min):** Remind members to talk with their networks about the coalition, listen for stories or gaps, and bring those insights to the next session.
- **Preview Workshop 2 (1–2 min):** Share that the next session will focus on reviewing and expanding the Snapshot, identifying gaps, and beginning to map power and influence.

- **Close with Reflection (2–3 min):** Invite each participant to share one word or phrase about how they're leaving today. This provides both a check-in on group energy and a sense of closure.

Output:

- Coalition leaves with clarity on its **purpose, values, and agreements**.
 - Homework assignments confirmed for **Snapshot data gathering**.
 - Clear expectations for **Workshop 2: Expanding the Picture**.
-

Workshop 2 – Coalition Structure & Snapshot Foundations

 *Guide Sections: 1.3 (Choosing How We Work Together), 2.1 (Snapshot Orientation & Deep Dive), 3.1 (Gap Planning & Community Insight)*

 *Workbook References: Workshop 2, Activities 1–4 + Appendix C (Roles & Responsibilities Matrix)*

 Estimated Time: 3 hours

By the end of this session, the coalition will:


- Decide on initial structure, leadership, and decision-making practices.
- Learn how to use the Community Food System Snapshot Tool.
- Explore one or more sectors in detail to practice.
- Identify the most important gaps and create a plan for data and outreach assignments.

Introduction

1. Welcome & Reflections from Workshop 1 (10 min)

- Reconnect and share one key takeaway from Workshop 1.
 - Frame today's work as moving from "vision and values" → "how we work together + building our shared picture."
-

Activity 1: Choosing Coalition Structure, Leadership, and Decision-Making (50-60 Mins)

 *Guide Reference: Section 1.3 – Choosing How We Work Together*


 *Workbook Connection: Appendix C – Roles & Responsibilities Matrix*

Purpose: Decide on a starting coalition format, leadership model, decision-making approach, and initial roles. These choices can evolve over time but will provide clarity and accountability as the coalition begins its work.

1. Coalition Format

Which structure feels right for now? (Circle or check one)

- ☐ Informal Coalition – loosely organized, early-stage networking/relationship-building
- ☐ Formal Coalition – defined leadership, bylaws, decision-making processes
- ☐ Time-Limited Coalition – focused on a specific project/campaign with an end date
- ☐ Ongoing Coalition – long-term, adaptive, systemic change focus

 Notes (why this format fits us right now):

2. Leadership Options

Which leadership style(s) will we use? (Check any that apply)


- ☐ Rotating Leadership – members take turns facilitating/leading
- ☐ Shared Leadership Team – small steering group collaborates on planning/decision-making
- ☐ Anchor Organization Model – one organization provides backbone/logistical support

 Notes (how this aligns with our values and capacity):

3. Decision-Making Approach

Which method will we use to start? (Circle or check one)

- ☐ Consensus – all agree or can live with the decision
- ☐ Majority Vote – option with most votes carries
- ☐ Hybrid – committees recommend, full coalition approves

 Notes (how we will document/share decisions):

4. Roles & Responsibilities

Use **Appendix C: Roles & Responsibilities Matrix** to assign specific responsibilities. At this stage, focus on the basics: facilitator, note-taker, outreach/engagement lead, data coordinator.

Which roles do we need right away?

- Facilitator: _____
- Note-taker: _____
- Outreach/Engagement Lead: _____
- Snapshot/Data Coordinator: _____

 Notes (any other roles needed now or soon):

Activity 2 – Snapshot Tool Orientation (25 Mins)

 See Guide 2.1 (Snapshot overview) and 1.2 (building shared understanding).

Purpose: To introduce coalition members to the Community Food System Snapshot Tool, ensuring everyone understands its structure, purpose, and how it

will guide data gathering and sensemaking. This orientation prepares members to begin using the tool in Workshops 1 and 2.

- **Introduce the Tool (5 min)**

- Share the five sectors in the tool:
 - Cultivation & Harvesting
 - Processing & Transformation
 - Aggregation & Distribution
 - Purchasing & Nourishment
 - Conservation & Stewardship
- Explain that these represent the entire “flow” of a community food system, from growing and harvesting food to conserving the land and resources that support it.

- **Walk Through Structure (10 min)**

- Show how each sector’s sheet includes:
 - Common Tactics (examples of typical activities or strategies).
 - Current Situation Questions (prompts to assess what’s happening locally).
 - Great Things / Strengths (space to celebrate what’s working).
 - Research Questions (gaps or uncertainties that need exploring).
 - Stakeholders to Connect With (who should be part of the conversation).
 - Suggested Secondary Data Sources (where to find supporting data).
- Highlight that this structure ensures both community voice and data sources are included.

- **Show an Example (5 min)**

- Display a completed or sample sector (if available).
- Point out how strengths, gaps, and questions can lead directly into coalition projects later.

- **Clarify Role in Coalition Process (5 min)**

- Emphasize that the Snapshot Tool is the coalition’s **single source of truth** about the food system.
- Note how it connects to future workshops:
 - Workshop 2 → Additions & Gap Identification.
 - Workshop 3 → Identifying themes from the snapshot.
 - Workshop 4 → Using snapshot insights to shape priorities.

Outputs:

- Coalition understands the five sectors of the Snapshot Tool.
 - Coalition members are familiar with the structure (tactics, questions, strengths, stakeholders, data sources).
- Coalition knows how this tool connects to future workshops.
-

Activity 3 – Snapshot Deep Dive (30 Mins)

 See Guide 2.1 (applied walk-through of a sector)

Purpose: Introduce the full Coalition with the Community Food System Snapshot Tool, ensuring all members understand its purpose, structure, and role in shaping coalition priorities.

1. Recap (5 min)

- a. Remind participants that the Snapshot Tool was introduced in Workshop 0 as the coalition’s shared data-gathering method. Now the full coalition will work together to expand it.

2. Walk Through One Sector in Detail (10 min)

- Choose one sector (e.g., *Cultivation & Harvesting*).
- Show how to:
 - Identify **strengths** (what’s already working).
 - Record **gaps or challenges** using the research questions.
 - Capture **stakeholders** who should be included.
 - Note **secondary data sources** (e.g., USDA Ag Census, state reports).
- Use a concrete example: *“We see strong cattle production here — that’s a strength. But we lack local vegetable processing — that’s a gap. A relevant data source might be USDA NASS, and stakeholders could include the local farmer’s market board.”*

3. Small-Group Exploration (10 min)


- Break into small groups, assigning each group one sector.
- Ask each group to:
 - Identify 1–2 strengths.
 - Identify 1–2 questions or gaps.
 - List 1–2 stakeholders or data sources.

- Encourage groups to think about both community voice and secondary data.
- **Report Back & Reflection (5 min)**
 - Each group shares highlights.
 - The facilitator captures notes on flipcharts or a shared doc.
 - Reinforce how these inputs will shape the coalition's ongoing work and feed into Workshop 2 (filling gaps and refining the snapshot).

Outputs:

- Coalition members practice using the Snapshot Tool.
- Initial notes added to multiple sectors.
- Shared understanding that the snapshot is a living document to be updated and refined.

Activity 4 – Gap Identification & Planning (45-60 Mins)

 *Guide Reference: Section 3.1 – Why a Gap Plan Matters*

Purpose: To surface what's missing in the Community Food System Snapshot and document a clear plan for addressing the most important gaps.

1. In small groups, ask: *What's missing from the Snapshot? (voices, content, relationships, data sources)*
2. Share back and cluster gaps by type.
3. As a coalition, select the top 2–3 gaps that are most important to fill before the next workshop.
4. Use the **Gap & Next Steps Table** (in the Workbook) to record:
 - a. The gap
 - b. Why it matters
 - c. Possible data sources or community voices to engage
 - d. Who will follow up
 - e. By when

Outputs:

- A completed Gap & Next Steps Table in the Workbook.
- Shared agreement on which gaps to fill and who is responsible.


Gaps & Next Steps Table

Gap Description	Missing Voice/Sector	Suggested Method (e.g. Interview, Survey, Focus Group)	Responsible Person(s)	Deadline
e.g., No data on farm-to-school participation	School food service directors	Short phone interviews	Maria & Jake	Oct. 15

Wrap-Up & Next Steps (10-15 mins)

- **Remind participants** to bring any relevant reports, articles, or datasets about the local food system to Workshop 2.
- **Encourage outreach:** Ask members to talk with community contacts before the next session to surface additional insights or opportunities for inclusion in the Snapshot Tool.
- **Confirm assignments:** Ensure everyone knows their role in gathering data for specific sectors or asset areas, and when it is due.
- **Preview Workshop 2:** Let the group know the first activity will be reviewing and adding to the current Snapshot before planning how to fill gaps.
- **Close with reflection:** Invite one participant to share a takeaway or story about why this work matters, to keep the coalition rooted in purpose

Workshop 3 – Sensemaking & Priority Setting

 *Guide References: Part 2: Expanding the Picture; Section 3.1 Why Review & Update the Snapshot Together; Section 3.2 Sensemaking Before Choices; Section 2.2 Power Mapping; Section 2.4 Story & Narrative Power; Sections 3.3–3.4 From Themes to Projects*

 *Workbook Reference: Workshop 3, Activities 1–5*

 **Estimated Time:** 3 hours

Purpose: This workshop is where your coalition begins turning information into insight. You’ve launched with a shared vision and values, chosen how you’ll work together, and gathered new data and voices for the Community Food System Snapshot. Now it’s time to:

- Review and integrate what you’ve collected.
- Identify major themes that describe your community’s food system.
- Map who holds influence and trust — and how that affects your strategy.
- Surface dominant and counter-stories that shape what feels possible.
- Translate insights into draft project ideas that align with your coalition’s vision and values.

Why It Matters: Coalitions often want to jump straight into projects. Sensemaking slows the pace just enough to ensure your choices are grounded, inclusive, and durable. Themes, power maps, and stories help you see not only **what’s happening** in your food system, but also **why it happens and how to shift it**. By the end of this session, you’ll have a portfolio of draft project ideas, ready for prioritization in Workshop 4.

By the End of Workshop 3, Your Coalition Will Have:

- An updated, more complete Community Food System Snapshot.
- 4–7 clear themes that summarize your coalition’s shared understanding.
- A Power & Influence Grid identifying 6–10 critical stakeholders.
- A list of dominant and counter-stories to guide narrative strategy.
- Several draft project ideas documented in Project Development Worksheets.

Activity 1 – Data Review & Gallery Walk (30-40 Mins)

 *Guide Reference: Section 3.2 Reviewing & Interpreting Your Snapshot*

 *Workbook Reference: Workshop 3 – Activity 1*

Purpose: Review the coalition's Community Food System Snapshot and add new insights, corrections, or context.

Instructions


- Open and display the **Community Food System Snapshot Tool** (all sectors/asset areas).
- Walk through the data “gallery walk” style. Use sticky notes or write directly on large paper to add:
 - Comments or clarifications
 - Missing data points
 - Lived experience stories that give context
- Regroup as a coalition and reflect together: highlight patterns, repeated comments, or surprises.

Notes: *(space for participants to capture additional data or reflections)*

Outputs

- A complete, up-to-date visual map of the coalition's collected data
- Early identification of recurring themes

Activity 2 – Theme Clustering (30-45 Mins)

 *Guide Reference: Section 3.3 – Setting Priorities Collaboratively*

 *Workbook Reference: Workshop 3 – Activity 2*

Purpose: Move from raw data toward a smaller set of key themes that capture the coalition's shared understanding of the local food system.

Instructions

- Review the additions and notes from Activity 1.
- Cluster related data points and insights into larger “buckets.”
- As a group, give each cluster a plain-language theme name (e.g., *Fairness in Access, Processing Capacity, Youth Engagement*).
- Aim to identify 4–7 clear themes that summarize the coalition’s shared understanding.

Notes: (space for participants to list their 4–7 themes)

Outputs: 4–7 named themes that reflect the coalition’s shared understanding

Activity 3 – Power Mapping & Influence Grid (30–40 Mins)

 *Guide Reference: Section 2.2 – Power Mapping; Section 3.1 – Why It Belongs Before Choices*

 *Workbook Reference: Workshop 3 – Activity 3*

Purpose: Identify who has influence and trust in your food system to clarify which relationships are most important for advancing coalition priorities.

Instructions

- Brainstorm stakeholders: individuals, organizations, agencies, cultural leaders, businesses, funders, etc.
- Place each stakeholder into one quadrant of the **Influence/Trust Grid**.
- Discuss together: *Why is this stakeholder placed here? Do we agree?*
- Circle 6–10 key stakeholders who are most important to engage moving forward.
- Note fairness implications: Who has high trust but little influence? Who has power but little trust? What does that mean for coalition strategy?

Influence/Trust Grid Template

	High Trust	Low Trust
--	-------------------	------------------

High Influence	<i>Key allies and partners — bring them in early; co-design with them; they strengthen credibility.</i>	<i>Potential blockers / need trust-building — may have resources, authority, or policy levers but lack credibility with the community. Prioritize listening and bridge-building.</i>
Low Influence	<i>Community anchors — trusted voices but may lack resources or decision power. Engage as messengers and validators.</i>	<i>Low priority / monitor — limited power and trust. Note them, but don't focus energy here unless the landscape shifts.</i>

Notes: (space for participants to write names, placement decisions, and outreach notes)

Outputs

- A completed Influence/Trust Grid with 6–10 stakeholders circled
- Notes on outreach actions and trust-building strategies
- Key takeaways about inclusivity gaps (who's trusted but overlooked, who has power but no connection)

Activity 4 – Story-Based Strategy & Narrative Power (40-50 mins)

 See Guide 2.4 (story & narrative power) and 3.1 (why narrative power matters)

Purpose: Surface and shift the stories that shape how people see your food system, strengthening your coalition's narrative power.

1. Identify Dominant Stories (10–15 min)

Ask: “What are the common stories we hear about local food in our community?”

Examples:

- “Local doesn’t scale here.”
- “Farmers can’t make a living.”
- “Healthy food is only for the wealthy.”

Write these down in the **Storytelling Strategy Table** under “Dominant Stories.”

2. Name Counter-Stories (10–15 min)

Ask: “What counter-stories exist that show resilience, possibility, or success?”

Examples:

- “Our farmers’ market doubled vendors in 3 years.”
- “Our schools now serve local carrots and SNAP families can buy CSA shares.”

Record these in the table under “Counter-Stories.”

3. Strategy Questions (15–20 min)

Use the prompts in the table to guide discussion:

- Who needs to hear these stories?
- Where will we share them (e.g., social media, community meetings, local paper)?
- How will we ensure stories are told *with people, not about them*?


Outputs:

- A list of **dominant and counter-stories**.
- Early ideas for **narrative strategies** to lift up resilience and possibility.

Storytelling Strategy Table

Prompt	Notes
What are the dominant stories we hear about local food in our community?	
What counter-stories do we want to lift up?	
Who needs to hear these stories?	
Where will we share them?	
How will we ensure stories are told <i>with people, not about them</i> ?	

Activity 5 — From Themes to Project Ideas (90-110 Mins)

 *Guide Reference: Section 3.2 – Sensemaking Rationale; Sections 3.3–3.4 – From Themes to Projects*

 *Workbook Reference: Workshop 3 – Activity 4*

Purpose: To translate coalition priorities into specific, actionable project ideas and prepare them for prioritization.

 *Tool Link: Use the Project & Action Planning Toolkit to capture and refine your work.*

Instructions

1. Review Coalition Priorities

- Bring forward the finalized themes from Activity 2 and insights from Power Mapping.


2. Brainstorm Project Ideas (20–30 min)

- In small groups, generate as many project ideas as possible that align with identified themes.
- Use sticky notes, chart paper, or a digital whiteboard.

3. Initial Refinement (20–30 min)

- For each idea, discuss:
 - Does this align with our coalition’s vision and values?
 - Should the coalition lead, support, or advocate?
 - Is it realistic given our capacity?
 - Who benefits, and who might be left out?
 - Can we measure progress?

4. Draft Projects (30–40 min)

- Use the **Project Development Worksheet** in the  **Project & Action Planning Toolkit** to capture ideas.
- [Download the Toolkit] (insert link).
- The Toolkit includes:
 - Project Development Worksheet (Workshop 3)
 - SMARTIE Goal Notes Table (Workshop 4)
 - Action Planning Template (Workshop 5)

5. *This allows coalitions to move seamlessly from brainstorming project ideas → drafting SMARTIE goals → creating full action plans.*

Example “Farm-to-Senior CSA: Provide weekly produce boxes from a local farm to 25 seniors at the senior center. Coalition supports outreach and grant writing. Needs funding in Year 1.”

5. Prioritization Prep (10 min)

- Identify 2–3 projects per theme to carry forward into Workshop 4.

Notes: *(space for draft ideas and notes)*

Outputs


- Draft project ideas captured in the **Project Development Worksheet**
 - A portfolio of potential projects ready for prioritization in Workshop 4
-

Wrap-Up & Transition (10–15 mins)

 *Guide Reference: Section 3.4 – Designing SMARTIE Goals*

 *Workbook Reference: Workshop 3 – Wrap-Up*

Facilitation Steps

- Summarize key outputs from today:
 - 4–7 themes summarizing what the coalition has learned from the data
 - Completed Power & Influence Grid with 6–10 key stakeholders circled
 - A set of dominant and counter-stories captured in the Story Strategy chart
 - Several draft project ideas documented in the  **Project & Action Planning Toolkit**
- Confirm that all worksheets and notes are collected and shared with the group.
- Remind participants to continue connecting with missing voices and documenting new stories or data points between now and the next session.
- Preview Workshop 4: The coalition will prioritize draft projects and refine them into SMARTIE goals.

Outputs

- Shared accountability for capturing outstanding data, voices, and stories
- Clear transition into Workshop 4: Prioritization & SMARTIE Goals

Workshop 4 - Project SMARTIE Goal Setting

 *Guide References: 3.4 Why Prioritize Transparently; 3.5 Why SMARTIE Goals (and Why Now); Appendix E: Project Prioritization Criteria Rubric*

 Estimated Time: 3.5-4 hours

Purpose: In this workshop, the coalition will move draft project ideas into clear, actionable SMARTIE goals. First, projects are prioritized fairly using agreed criteria. Then, the coalition will refine top priorities into SMARTIE goals that are Specific, Measurable, Achievable, Relevant, Time-bound, Inclusive, and Equitable (Fair).

Activity 1 - Project Prioritization (60-75 mins)

 *Guide Reference: Section 3.4 – Why Prioritize Transparently*

 *Workbook Reference:*

- *Workshop 4 – Activity 1*
- *See Appendix E: Project Prioritization Criteria Rubric for scoring details*

 **Tool: Coalition Project Prioritization Matrix** (Excel/Google Sheet)

Purpose: To evaluate potential coalition projects transparently and fairly, using agreed-upon criteria. This process ensures decisions are made with clear rationale, grounded in coalition values, feasibility, community impact, and resource considerations.

Decide which projects to prioritize by scoring them fairly using shared criteria. This ensures decisions are grounded in coalition values, feasibility, community impact, cost, and alignment with priorities.


Instructions

1. Review the five criteria:
 - Project Values
 - Feasibility
 - Cost


- Community Impact
 - Priorities Alignment
2. You can also create your own criteria. These are just suggestions. Agree as a group on weights for each criterion (suggested: Feasibility 25%, Values 10%, Priorities Alignment 15%, Cost 20%, Community Impact 30%).
 3. Score each project individually or in small groups using the rubric in Appendix E.
 4. Enter scores into the **Coalition Project Prioritization Matrix** to calculate totals.
 5. Review the results together and identify the top 3–5 projects.
 6. Record the rationale for why these were chosen, not just their scores.

Outputs

- Scored and ranked list of potential projects
- Coalition agreement on 3–5 top priorities
- Rationale for chosen projects documented here

 **Notes / Decisions:** *(space for participants to jot weights, scores, and final choices)*

Activity 2 – SMARTIE Goals (20 min)

 See Guide 3.5: *Why SMARTIE Goals (and Why Now) (how SMARTIE converts enthusiasm into execution; role of Inclusive & Equitable).*

 See Appendix B: *Community-Centered Metrics Examples for ideas on how to define 'measurable' in your goals.*

Facilitation Steps:

- Review what each letter in SMARTIE means.
 - Look at 1–2 example goals (good and bad) to see the difference.
- Ask questions so everyone is clear on the framework.

SMARTIE means your goal is...

- **S – Specific:** Clearly describes what will be done.
- **M – Measurable:** Includes a way to track progress and know when it's done.
- **A – Achievable:** Realistic given your resources, time, and capacity.
- **R – Relevant:** Directly connected to your coalition's purpose and chosen priorities.
- **T – Time-bound:** Has a clear deadline or timeframe.
- **I – Inclusive:** Brings in underrepresented voices and perspectives.
- **E – Equitable:** Advances fairness and reduces disparities and/or barriers.

Example Goals


Weak: "Support local farmers."

Strong: "By October 2025, launch a weekly farmers market in the town square that includes at least three BIPOC-owned farms and accepts SNAP benefits."

Weak: "Improve school lunches."

Strong: "By May 2026, introduce at least three Montana-grown ingredients into the lunch program at all district schools, with menu promotions created by a student-led food council."

Activity 3 – Clarify Priorities Before Goal-Setting (20-30 Mins))

 See Guide 3.5: *Why SMARTIE Goals (and Why Now) (use of a brief Priority Statement to ground the goal in values, "who," and the change sought).*

Facilitation Steps: Before turning a priority into a SMARTIE goal, use the prompts below to ground your work in coalition values and real community needs.

Priority Statement Prompts (fill in before SMARTIE goal drafting):

- Why does this priority matter? (How does it connect to coalition values/purpose?)
- Who is most affected or involved?
- What change do we want to see around this issue?

This short reflection becomes the "Priority Statement" that anchors the goal.

Record your group's responses in the SMARTIE Goal Notes Table (see the Project & Action Planning Toolkit download [here](#)).

SMARTIE Goal Notes Table

Prompt	Priority Statement
Why does this priority matter?	
Who is most affected/involved?	
What change do we want to see?	


Draft Goal Statement:

Lead Person/Team:

Immediate Next Step(s):

Check-in Date:

Activity 4 – Turn Priorities into Draft Goals (50 min)

 *Guide Reference: Section 3.5 – Element-by-Element Drafting*

 *Tool: Use the **SMARTIE Goal Notes Table** in the Project & Action Planning Toolkit*

Purpose: Translate each Priority Statement into a draft SMARTIE goal that is Specific, Measurable, Achievable, Relevant, Time-bound, Inclusive, and Equitable.

Instructions

1. Work in your small group (one group per priority).

2. Use the **SMARTIE Goal Notes Table** in the Toolkit to guide your draft. Work through each element step by step (S → M → A → R → T → I → E).
3. Write one concise draft goal statement that brings all SMARTIE elements together.
4. Record who will lead, immediate next steps, and a check-in date.

Outputs

- Completed SMARTIE Goal Notes Table for your priority
- Draft SMARTIE goal statement ready for coalition review

Space for Notes / Draft Goal Statement

Activity 5 – Refine & Assign (70 min)

 *Guide Reference: Section 3.5 (Refinement); 3.7–3.8 (Roles & Workload)*

 *Workbook Reference: Workshop 4 – Activity 5*

 *Tool: Use the **SMARTIE Goal Notes Table** in the Project & Action Planning Toolkit*

Purpose: Strengthen draft SMARTIE goals as a full coalition, then assign leads and immediate next steps.

Instructions

1. Each group shares its draft goal (2–3 minutes each).
2. As a coalition, provide feedback using: “What works? What could improve?”
3. Make live edits to clarify, tighten measurability, and strengthen fairness/equity.
4. Confirm ownership for each goal:
 - Lead person/team
 - Immediate next step(s)
 - Check-in date
5. Record final goals in the **SMARTIE Goal Notes Table** (Toolkit).

Outputs

- Finalized SMARTIE goals
- Named leads/co-leads, immediate next steps, and check-in dates



Notes / Assignments

(space for coalition to capture decisions)

Wrap-Up and Next Steps (10–15 min)



Guide Reference: Section 3.6 – Why Action Planning + Community-Centered Metrics Belong Together



Workbook Reference: Workshop 4 – Wrap-Up

Purpose: Confirm shared commitment to the SMARTIE goals and prepare for action planning in the next workshop.


Instructions

1. Review the final SMARTIE goals together.
2. Confirm coalition agreement on these goals.
3. Record where finalized goals will live (shared drive/Toolkit/Workbook) and who will share them with the group.
4. Preview next session: “We’ll turn these goals into action plans and choose community-centered metrics to track progress.”
5. Close with a quick go-round: “*One word on how you’re leaving today.*”

Outputs

- Coalition-approved SMARTIE goals
 - Agreement on where goals are documented and who will circulate them
 - Clear transition into Workshop 5 (Action Planning & Metrics)
-

Workshop 5 – Action Planning & Community-Centered Metrics

 *Main Guide References: Section 3.5 – Turning Goals into Action; Section 3.6 – Tracking Progress & Learning*

 *Workbook Reference: Workshop 5 – Activities 1–4*

Estimated Time: 2.5–3 hours (can be split into two shorter sessions)

Purpose: To turn the coalition’s SMARTIE goals into clear, actionable steps with assigned responsibilities, timelines, resources, and ways to measure success. By the end of this session, the coalition will know:

- What needs to happen
- Who is leading each step
- By when tasks should be completed
- With what resources
- How success will be measured in ways that reflect community values

This workshop makes the coalition’s goals real and creates accountability systems to sustain momentum.

Activity 1 – Review Coalition Priorities and SMARTIE Goals (15–20 mins)

 *Guide Reference: Section 3.4 – Designing SMARTIE Goals*

 *Workbook Reference: Workshop 5 – Activity 1*

Purpose: Revisit and confirm alignment on the SMARTIE goals before building action plans.

Instructions

- Open the **Project & Action Planning Workbook** (tab: *SMARTIE Goals*).
- Review the coalition’s 2–3 finalized SMARTIE goals recorded in Workshop 4.
- Discuss as a group: *“Do these still feel aligned with our purpose and priorities?”*
- Make quick clarifications or edits if needed, and update the *SMARTIE Goals* tab if changes are agreed.

Notes:

Activity 2 – Introduce the Action Planning Table (15–20 mins)

 *Guide Reference: Section 3.5 – From Goals to Action Plans*

 *Workbook Reference: Workshop 5 – Activity 2*

Purpose: Ensure everyone understands how to use the Action Planning Table to turn goals into actionable steps.

Instructions

- Open the **Project & Action Planning Workbook** (tab: *Action Planning*).
- Walk through each column together:

Column	What to Include
Goal	The SMARTIE goal this action supports
Action Step	A specific task or milestone (break large projects into smaller steps)
Lead Person/Team	Who is responsible for making sure this step happens
Partners	Others who will assist, provide resources, or expertise
Timeline	When this step should be started and completed
Resources Needed	Funding, materials, connections, approvals
Status	Current progress (Not Started, In Progress, Completed)
Notes	Additional details, updates, or follow-up items

- Clarify that this digital version will serve as the coalition’s **living project tracker**.

Notes: *(space for participants to jot examples or reminders)*

Outputs - Coalition understands how to use the Action Planning Table (tab in the Project & Action Planning Workbook) as their shared project tracker.

Activity 3 – Plan & Share (65–70 mins)

 *Guide Reference: Section 3.5 – Turning Goals into Action*

 *Workbook Reference: Workshop 5 – Activity 3*

Purpose: Work in small groups to complete action plans for each goal, then share and refine them with the full coalition.

Instructions

- Break into small groups (one group per SMARTIE goal).
- Open the **Project & Action Planning Workbook** (tab: *Action Planning*).
- For each goal, groups should:
 - Draft 3–5 action steps
 - Assign a lead person/team for each step
 - Identify potential partners
 - Set timelines and needed resources
 - Record all details in the *Action Planning* tab
- Reconvene as a full coalition. Each group presents their plan (5–7 minutes).
- Capture real-time edits in the shared *Action Planning* tab based on coalition feedback.


Notes:

(space for participants to jot quick edits or overlaps to track)

Outputs

- Finalized action plans for each goal
 - Clear lead assignments and accountability agreements
-

Activity 4 – Choosing Community-Centered Metrics (25–30 mins)

 *Guide Reference: Section 3.6 – Tracking Progress & Learning*

 *Workbook Reference: Workshop 5 – Activity 4*

Purpose: Define how success will be measured in ways that reflect coalition priorities and community values.

Instructions

- Review examples from **Appendix B – Community-Centered Metrics**.
- In small groups, brainstorm 2–3 possible metrics tied to each SMARTIE goal.
- Share ideas with the full coalition.
- As a coalition, select a short list of key metrics for each SMARTIE goal.
- Record chosen metrics in the **Project & Action Planning Workbook** (*Action Planning* tab, “Metrics” column).

Notes: *(space for jotting brainstormed metrics)*

Outputs

- A shared set of community-centered metrics tied to each SMARTIE goal
 - Agreement on how metrics will be tracked and updated
-

Wrap-Up & Next Steps (20–25 mins)

 *Guide Reference: Section 3.6 – Tracking Progress & Learning*

 *Workbook Reference: Workshop 5 – Wrap-Up*

Purpose

Confirm finalized action plans, assign accountability, and set agreements for tracking and reporting progress.

Instructions

- Review all finalized action plans and assigned leads in the **Project & Action Planning Workbook** (*Action Planning* tab).
- Confirm who will maintain and update the workbook as the coalition’s living tracker.

- Agree on how progress will be reported (e.g., monthly check-ins, quarterly reflections).
- Close with a round: *“What’s one thing you’re excited to see move forward?”*

Outputs

- Coalition-approved action plans and metrics
 - Clear accountability for updating and tracking progress
 - Stronger sense of ownership and readiness for implementation
-

Workshop 6 - Reflection & Celebration & Adaptation (Optional)

 *Main Guide Reference: Section 3.7 – Reflection & Learning*

 *Workbook Reference: Workshop 6 – Reflection & Celebration & Adaptation (Optional)*

Estimated Time: 1.5–2 hours

Purpose: This optional workshop creates a pause point for coalitions to take stock of progress, celebrate milestones, and intentionally adapt before moving forward. It works best after several months of implementation or at a natural transition point. Unlike earlier workshops, this one is less structured and more celebratory — the emphasis is on reflecting together, honoring contributions, and strengthening relationships.

By the end of this session, the coalition will have:

- Reflected on successes, challenges, and lessons learned.
- Identified 1–3 adjustments to strengthen coalition work.
- Chosen or revisited key community-centered metrics (optional).
- Celebrated contributions and renewed energy for the next phase.

Facilitator Prep Checklist:

- ☐ Print or project reflection prompts.
- ☐ Print Appendix A – Coalition Health Tracking Worksheet
- ☐ Prepare coalition timeline or milestone list (from past workshops or notes).
- ☐ Bring flip chart paper, markers, or whiteboard.
- ☐ Optional: certificates, thank-you cards, recognition tokens, or a shared meal.

Time	Activity	Purpose
60–75 min	Activity 1 – Reflection & Learning Conversation	Reflect on successes, challenges, and coalition health; identify emerging opportunities and agree on 1–3 adjustments for the next phase.
20–30 min (optional)	Activity 2 – Selecting Community-Centered Metrics	Define and agree on a short list of meaningful, equity/fairness-focused metrics that reflect coalition values and impact.
15–20 min	Wrap-Up & Next Steps	Summarize insights, confirm responsibilities for adjustments/metrics, schedule next reflection, and celebrate progress together.

Activity 1– Reflection & Learning Conversation (60-75 mins)

 *Guide Reference: Section 3.7 – Reflection & Learning*

 *Workbook Reference: Workshop 6 – Activity 1*

Purpose: Assess coalition health, energy, and impact; identify successes, challenges, and adjustments for the next season or phase.

Facilitation Steps:

1. **Set the tone:** “This is a learning space for us to grow stronger together.”
2. **Quick check-in:** Each participant shares one highlight since the last reflection.
3. **Prompts for whole-group reflection:**
 - What’s working well in our coalition right now?
 - Where are we feeling stuck or losing momentum?
 - Who’s missing from the table?
 - What opportunities are emerging that we could lean into this season?
 - What have been our biggest successes since the last review?
 - What challenges have we faced, and what can we learn from them?

- How have our relationships and trust grown (or not)?
- What adjustments would strengthen our work in the next season?
- 4. **Capture insights visibly** (flip chart, projector, or shared doc).
- 5. **As a group, agree on 1–3 concrete adjustments or next steps.**

Materials Needed:

- ☐ Flip chart/whiteboard
- ☐ Appendix A – Coalition Health Tracking Worksheet
- ☐ Markers
- ☐ Optional printed prompts

Outputs:

- List of successes, challenges, and lessons learned
- 1–3 agreed adjustments or next steps.
- Assigned leads for any actions.

Activity 2 – Selecting Community-Centered Metrics (Optional, 20–30 mins)

 *Guide Reference: Section 3.7 – Reflection & Learning*

 *Workbook Reference: Appendix B – Community & Project Metrics Framework*

Purpose: Define how success will be measured in ways that reflect coalition values and community impact.

Facilitation Steps:

1. **Introduce metrics:** Share Appendix B examples (quantitative + qualitative).
 - Numbers: lbs of local food purchased, # of youth engaged
 - Stories: testimonials of improved access, producer resilience
2. **Small group brainstorm:** Each group reviews one SMARTIE goal and suggests 2–3 possible metrics.
3. **Coalition selection:** Share ideas back and select a short list of key metrics (5–7 total).
4. **Record metrics:** Document choices in Appendix A or directly into the Action Planning Table.

Materials Needed:

- ☐ Appendix B – Community & Project Metrics Framework
- ☐ Flip chart or shared doc

Outputs:

- Shared set of community-centered metrics tied to coalition goals.
 - Agreement on how/when metrics will be tracked.
-


Wrap-Up & Next Steps (15–20 mins)

- Summarize insights and adjustments.
- Confirm metric tracking responsibilities (if chosen).
- Decide when to hold the next reflection workshop.
- Celebrate! Consider recognition, photos, or shared food.

Outputs:

- Documented adjustments.
 - Assigned metric tracking leads.
 - Renewed coalition commitment and morale.
-

Using Ongoing Practices

 *Main Guide References: Section 3.7 – Reflection & Learning; Section 5.2 – Tracking Growth & Engagement; Section 5.4 – Ongoing Evaluation as a Learning Practice*

 *Workbook Reference: Ongoing Practices*

Purpose: Ongoing Practices are the coalition’s maintenance plan — the regular check-ins and tune-ups that keep work healthy, adaptive, and connected between workshops. These practices are not one-time events; they are woven into monthly or quarterly workshops, seasonal gatherings, and annual planning cycles.

Activity 1 – Coalition Health & Progress Tracking

 *Guide Reference: Section 5.2 – Tracking Coalition Growth & Engagement*

 *Workbook Reference: Appendix A – Coalition Health Tracking Worksheet*

When to Use: Quarterly or seasonal check-ins

Purpose: Monitor membership, engagement, and progress toward goals.

Facilitation Steps:

1. Start with a quick “pulse check” round — ask members one highlight since the last meeting.
2. Use the **Coalition Health Tracking Worksheet** (Appendix A) to review:
 - a. Membership and sector representation
 - b. Attendance patterns
 - c. Leadership distribution
3. Invite open discussion on challenges or gaps in representation or participation.
4. Capture action steps (e.g., outreach needed, changes to meeting format).

Materials Needed:

- ☐ Coalition Health Tracking Worksheet (Appendix A)
- ☐ Meeting attendance or membership records

Output:

- Updated Coalition Health Tracking Worksheet
 - List of action steps to address gaps
-

Activity 2 – Learning Gatherings & Reflection

 *Guide Reference: Section 5.4 – Ongoing Evaluation as a Learning Practice*

 *Workbook Reference: Appendix A – Coalition Health Tracking Worksheet*

Purpose: Reflect on what's working, what's not, and what should change.

When to Use: Seasonal, quarterly, or after major projects

Facilitation Steps:

1. Frame the session as a **learning conversation** — not a performance review.
2. Use prompts from the **Coalition Health Tracking Worksheet** to guide discussion.
3. Encourage all voices. Consider pairing people up for 2–3 minutes before sharing back to the group.
4. End by identifying 1–3 concrete adjustments to try in the next season.

Materials Needed:

- ☐ Coalition Health Tracking Worksheet (Appendix A)
- ☐ Flip chart or large paper for capturing adjustments

Output:

- List of agreed adjustments.
 - Momentum for iterative improvement.
-

Activity 3 – Sustainability & Succession Planning

 *Guide Reference: Section 2.4 – Coalition Structures & Roles; Section 4.0 – Sustaining Momentum*

 *Workbook Reference: Appendix C – Roles & Responsibilities Matrix*

When to Use: Annually or before anticipated leadership transitions

Purpose: Ensure continuity of leadership, funding, and energy.

Facilitation Steps:

1. **Sustainability check:** Identify risks (burnout, funding gaps, membership loss).
2. **Leadership succession:** Review roles using Appendix C. Complete a succession table.

Succession Table

Role	Current Lead	Potential Successor(s)	Transition Plan (mentorship, training, etc.)	Target Date for Transition
Example: Meeting facilitator	Jordan M.	Sam R.	Shadow in next 3 meetings, then lead solo	September 2025

3. **Funding/resources:** Review current sources and brainstorm new opportunities.
4. **Culture-building:** Revisit values and decide on sustaining practices (celebrations, rotating facilitation, spotlights).

Outputs:

- Updated Roles & Responsibilities Matrix.
 - Succession planning table.
 - New funding/resource opportunities.
 - Commitment to at least one sustainability practice
-

Activity 4 – Embedding Practices into Meetings

 *Guide Reference: Section 5.4 – Ongoing Evaluation as a Learning Practice*

 *Workbook Reference: Action Planning Spreadsheet*

Purpose: Keep tracking, reflection, and sustainability in coalition rhythm

Facilitation Steps:

- Add a short “progress check” to every agenda.
- Keep seasonal/quarterly reviews on the calendar.
- Remind members how today’s work connects to long-term goals.

Outputs:

- Meeting rhythm that incorporates reflection, tracking, and adaptation.
-

Appendix A - Coalition Health Tracking Worksheet

Purpose: Use this worksheet during quarterly or seasonal check-ins to monitor coalition membership, engagement, and leadership patterns.

Category	Questions / Prompts	Notes	Action Items	Responsible Person(s)	Deadline
Membership	Who is currently active? Any new members? Is anyone missing?				
Sectors	Are all food system sectors represented? Which are under/over-represented?				
Participation	Are members attending regularly? Are they actively engaged in discussions/projects?				
Leadership Distribution	Are leadership roles balanced and sustainable?				

	Any risk of burnout?				
Engagement Highlights	What successes or wins have we had since our last check-in?				
Challenges/Barriers	What obstacles are we facing right now?				
Follow-Up Needs	What outreach, recruitment, or role adjustments are needed?				

Appendix B - Community & Project Metrics Framework

Purpose: Coalitions thrive when they measure both the tangible results of their projects and the deeper impacts on community health, equity, environment, and resilience. This appendix provides a broad menu of metrics. Choose those most relevant to your coalition's SMARTIE goals.

How to Use It

- During **Workshop 5**, select a few metrics for each SMARTIE goal.
 - During **Workshop 6** and **Ongoing Practices**, revisit and update your metrics.
 - Combine numbers (quantitative) with stories (qualitative).
-

1. Community Engagement & Inclusion

- Number of active coalition members
 - Representation across food system sectors (farmers, health, schools, etc.)
 - Participation from Indigenous, immigrant, or underserved communities
 - % of decision-making positions held by community members
 - Community satisfaction survey results
 - Testimonials or stories of increased trust, collaboration, or empowerment
-

2. Food Access & Nutrition

- Pounds of local food distributed through schools, food banks, or pantries
 - % increase in local food options at retail, restaurants, or farmers markets
 - Meals served with local food in institutions (school lunch, hospital meals)
 - Reduction in distance traveled for food (miles-to-plate)
 - Household surveys of diet diversity or food security
 - Stories from families about improved access to fresh, culturally relevant food
-

3. Economic Vitality

- Dollar value of local food purchased
- Number of new or expanded food businesses

- Number of jobs created or sustained in the local food system
 - Value of grants or investments leveraged by the coalition
 - % of coalition-related funds spent locally
 - Producer income diversification (new crops, new market channels)
 - Stories from producers about improved viability or stability
-

4. Environmental & Land Stewardship

- Acres under regenerative, organic, or sustainable management
 - Number of farms/ranches enrolled in monitoring (EOV, organic certification, etc.)
 - Water use efficiency (e.g., % reduction in irrigation water per acre)
 - Soil health indicators (organic matter %, soil tests, observational data)
 - Biodiversity counts (pollinators, birds, native species presence)
 - Waste reduction (tons of food waste composted or diverted)
 - Stories of ecological changes noticed by land stewards or community members
-

5. Policy & Systems Change

- Number of local/state policies influenced or adopted
 - Number of procurement policies updated to include local food
 - Formal partnerships or MOUs established
 - Public funding allocated to local food efforts
 - Policy wins captured in news coverage or legislative records
 - Stories of how policy shifts affected community members directly
-

6. Education & Awareness

- Number of workshops, trainings, or tours held
- Number of youth engaged in food/agriculture education
- Participant survey results (knowledge gained, confidence increased)
- Media coverage (articles, social media reach, earned media)
- Stories of behavior change (e.g., families gardening, schools composting)

7. Coalition Capacity & Sustainability

- Number of coalition meetings held and % attendance
- Shared leadership roles filled (rotating facilitation, committees, etc.)
- Funds raised for ongoing coalition work
- In-kind contributions (volunteer hours, space, supplies)
- Turnover rate of members vs. retention
- Stories of coalition resilience during challenges (e.g., adapting to crises)

8. Equity & Justice / Fairness and Accessibility (cross-cutting)

- Resources directed to historically marginalized groups (% of funding, land, or contracts)
- Leadership opportunities held by women, BIPOC, youth, or LGBTQ+ members
- Culturally relevant foods supported or distributed
- Stories of power-sharing, healing, or inclusive decision-making

Outputs:

- Select 3–5 **core community metrics** that reflect values and priorities.
- Pair each SMARTIE goal with 1–2 **project metrics** to track progress.
- Revisit metrics quarterly/annually to adapt and celebrate impact.

Appendix C - Roles & Responsibilities Matrix

Purpose: Clarify who is responsible for which roles and ensure that all leadership and operational tasks are covered. Use during annual reviews or succession planning discussions.

Role	Primary Responsibilities	Current Person(s)	Backup / Support	Term	Potential Successor(s)
Facilitator / Chair	Guides coalition meetings, ensures agenda is followed, facilitates decision-making.				
Co-Facilitator / Vice Chair	Steps in when the facilitator is unavailable, supports facilitation tasks.				
Secretary / Note-taker	Records meeting notes, manages coalition records.				
Communication Lead	Manages emails, social media, and outreach materials.				

Data / Tracking Lead	Maintains coalition data, tracks progress toward goals.				
Events Coordinator	Plans logistics for events, workshops, and gatherings.				
Sector Reps	Brings perspectives and updates from their sector; ensures sector voice in decision-making.				
Other Key Roles	Add additional coalition-specific roles here.				

Appendix D – Pre/Post Survey Template

 *Guide Reference: Part 5.3 – Conducting Pre- and Post-Surveys to Track Growth*

 *Workbook Connection: Workshop 6 – Reflection & Celebration*

Instructions for Participants:

This survey is used at the beginning (*Pre*) and end (*Post*) of our coalition cycle. Please complete honestly — responses help us track growth, celebrate successes, and identify areas to improve. Responses are anonymous unless you choose to add your name.

Part 1 – Individual Confidence & Knowledge

1. My understanding of our community food system is:

	Very Low	Low	Moderate	High	Very High
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. My confidence in participating in coalition discussions and decision-making is:

	Very Low	Low	Moderate	High	Very High
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. My understanding of equity/fairness and inclusion in food systems work is:

	Very Low	Low	Moderate	High	Very High
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. My knowledge of coalition tools (Snapshot, SMARTIE goals, Action Planning) is:

	Very Low	Low	Moderate	High	Very High
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 2 – Coalition Strength & Functioning

5. The coalition reflects diverse voices from across the food system.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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6. Trust and relationships are growing within the coalition.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. The coalition has a clear purpose and direction.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. The coalition makes inclusive and fair decisions.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 3 – Impact & Value

9. My participation in this coalition benefits my work, organization, or community role.

	Not at all	A little	Somewhat	Quite a bit	A great deal
Pre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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10. Biggest change I've noticed in myself or my community as a result of coalition work:

Pre: _____

Post: _____

11. What should the coalition keep doing?

Pre: _____

Post: _____

12. What should the coalition change or do differently?

Pre: _____

Post: _____

Outputs: Use these results in Workshop 6 – Reflection & Celebration to highlight growth, identify shifts in trust and knowledge, and collect stories of impact.

Appendix E - Project Prioritization Criteria Rubric

Purpose: This rubric helps coalitions score potential projects fairly and transparently. Each project is evaluated against five criteria, with scores from 1 (low) to 5 (high).

Criterion 1: Project Values (Weight: 10%): How well does the project reflect the coalition's shared values and purpose?

Score	Description
1 – Very Low	Does not reflect coalition values; conflicts with stated purpose.
2 – Low	Minimal alignment; only loosely connects to purpose or values.
3 – Moderate	Somewhat aligned; fits generally but not strongly connected.
4 – High	Clearly aligned; advances stated values and purpose.
5 – Excellent	Strongly embodies coalition's values and purpose; a model project.

Criterion 2: Feasibility (Weight: 25%): Is the project realistic given coalition capacity, time, and resources?

Score	Description
1 – Very Low	Unrealistic; requires resources, skills, or time coalition does not have.
2 – Low	Significant barriers; might only proceed with major external support.
3 – Moderate	Some challenges; possible with strong commitment and partnerships.
4 – High	Feasible with current capacity and resources, minor barriers exist.

5 – Excellent	Highly feasible; coalition clearly has capacity, resources, and readiness.
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Criterion 3: Cost (Weight: 20%): What is the anticipated financial burden relative to available funding or fundraising potential?

Score	Description
1 – Very High Cost	Very expensive; well beyond coalition or community means.
2 – High Cost	Significant cost; would require substantial outside funding.
3 – Moderate Cost	Costs are notable but potentially manageable with effort.
4 – Low Cost	Costs are relatively small and manageable within coalition’s means.
5 – Minimal Cost	Very low cost; can be accomplished with little or no additional funding.

Criterion 4: Community Impact (Weight: 30%): Will the project make a meaningful difference for the community?

Score	Description
1 – Very Low	Minimal benefit; unclear or very limited community impact.
2 – Low	Benefits a small group; limited visibility or systems change.
3 – Moderate	Moderate benefit; noticeable but not transformative.
4 – High	Strong benefit; improves systems, fair access, or visibility for many.

5 – Excellent	Transformative; broad and deep impact on equity/fair access, systems, and community health.
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Criterion 5: Priorities Alignment (Weight: 15%): How well does the project connect with the coalition’s identified themes and chosen priorities?

Score	Description
1 – Very Low	Not aligned with any coalition priorities.
2 – Low	Weakly connected; only touches one priority area indirectly.
3 – Moderate	Reasonable alignment; connects with at least one priority.
4 – High	Strong alignment with multiple coalition priorities.
5 – Excellent	Directly advances one or more top priorities; clear, strategic fit.

How to Use This Rubric:

1. Each coalition member (individually or in small groups) scores projects 1–5 for each criterion.
2. Enter scores into the **Coalition Project Prioritization Matrix Tool** (Excel/Google Sheet).
3. The tool applies weights and calculates totals.
4. Review, discuss, and adjust based on coalition dialogue before finalizing top 3–5 projects.

Appendix F - Agendas for All Workshops

Workshop 0 – Coalition Foundations & Pre-Work (Estimated Total Time: 2–3 hours)

Time	Activity	Purpose
20–30 min	Clarify Your Coalition's Purpose	Define why the coalition is forming and what success looks like.
45 min	Initial Coalition Outreach: Inviting People to the Table	Map representation, identify gaps, and plan inclusive invitations.
45 min	Introducing the Idea	Craft outreach strategies and invitation messages.
30–40 min	Pre-Launch Data Scan	Orient to the Snapshot Tool and begin collecting baseline data.
40 min	Coalition Launch Plan	Draft launch event agenda, logistics, and assignments.
10–15 min	Wrap-Up & Next Steps	Confirm assignments, encourage outreach/data gathering, preview Workshop 1.

Workshop 1 – Coalition Launch & Starting Your Snapshot (Estimated Total Time: 3–3.5 hours)

Time	Activity	Purpose
25 min	Welcome, Story, & Introductions	Ground in coalition story, land, and build connections.
40 min	Visioning a Thriving Local Food System	Co-create shared vision and themes.
30 min	Coalition Values Clarification	Name 4–6 core coalition values with definitions.
20 min	Group Agreements	Establish norms for collaboration and respect.
15–20 min	Snapshot Mini-Orientation & Homework	Introduce Snapshot Tool and assign baseline data gathering.
10–15 min	Wrap-Up & Next Steps	Confirm assignments, encourage engagement, preview Workshop 2.

Workshop 2 – Reviewing & Expanding Your Snapshot (Estimated Total Time: 3 hours)

Time	Activity	Purpose
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10 min	Introduction: Welcome & Reflection from Workshop 1	Reconnect and frame today's focus.
50–60 min	Choosing Coalition Structure, Leadership, & Decision-Making	Decide on coalition format, leadership model, decision-making, and roles.
25 min	Snapshot Tool Orientation	Familiarize coalition with Snapshot structure and sectors.
30 min	Snapshot Deep Dive	Practice using the tool and add entries.
45–60 min	Gap Identification & Planning	Identify missing voices/data and create a gap-filling plan.
10–15 min	Wrap-Up & Next Steps	Confirm outreach/data tasks, preview Workshop 3.

Workshop 3 – Sensemaking & Priority Setting (Estimated Total Time: 2.5–3 hours)

Time	Activity	Purpose
30–40 min	Data Review & Gallery Walk	Review full Snapshot, highlight additions, and notice patterns.

30–45 min	Theme Clustering	Cluster data into 4–7 shared themes.
30–40 min	Power Mapping & Influence Grid	Identify key stakeholders by influence and trust.
90–110 min	From Themes to Project Ideas	Translate themes into draft project ideas and record in worksheets.
10–15 min	Wrap-Up & Transition	Confirm outputs, preview SMARTIE goal-setting in Workshop 4.

Workshop 4 – SMARTIE Goal Setting (Estimated Total Time: 3–3.5 hours)

Time	Activity	Purpose
60–75 min	Project Prioritization	Fairly score and rank projects using shared rubric.
20 min	SMARTIE Goals Orientation	Build a shared understanding of SMARTIE and its importance.
20–30 min	Clarify Priorities Before Goal-Setting	Draft short Priority Statements (why, who, what change).

50 min	Turn Priorities into Draft Goals	Draft SMARTIE goals in small groups.
70 min	Refine & Assign	Review/refine goals, assign leads and next steps.
10–15 min	Wrap-Up & Next Steps	Confirm finalized goals, preview Action Planning.

Workshop 5 – Action Planning for SMARTIE Goals (Estimated Total Time: 2.5–3 hours)

Time	Activity	Purpose
15–20 min	Review Coalition Priorities & SMARTIE Goals	Revisit and confirm alignment before planning.
15 min	Introduce the Action Planning Table	Orient coalition to the planning/tracking tool.
65–70 min	Plan & Share	Draft action plans in small groups; refine as full coalition.
25–30 min	Choosing Community-Centered Metrics	Select 5–7 meaningful measures of success.

20–25 min	Wrap-Up & Next Steps	Confirm plans, assign responsibilities, and set reporting cadence.
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Workshop 6 – Reflection, Celebration & Adaptation (Optional, Estimated Total Time: 1.5–2 hours)

Time	Activity	Purpose
60–75 min	Reflection & Learning Conversation	Review successes, challenges, and adjustments for next phase.
20–30 min	Selecting Community-Centered Metrics	Agree on 5–7 metrics to track moving forward.
15–20 min	Wrap-Up & Celebration	Confirm next reflection, honor contributions, and close with gratitude.

Ongoing Practices – Sustaining Your Coalition (Built into quarterly/annual rhythms)

Time	Activity	Purpose
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30–40 min (quarterly)	Coalition Health & Progress Tracking	Monitor membership, representation, leadership, and progress.
45–60 min (seasonal/quarterly)	Learning Gatherings & Reflection	Capture lessons learned and identify adjustments/experiments.
45–60 min (annual)	Sustainability & Succession Planning	Ensure leadership continuity and funding/resource sustainability.
15–20 min (ongoing)	Embedding Practices into Meetings	Add progress/reflection segments to regular coalition meetings.