The Gathering Table:

Facilitator's Companion

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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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Table of Contents

The Gathering Table: Facilitator's Companion

This Companion is designed to help coalitions run a clear, engaging, and inclusive meeting series that moves from initial connection to action. It follows the structure of *The Gathering Table: A Guide for Building Food System Coalitions* and is paired with the *Coalition Workbook*, where notes, decisions, and data are recorded.

How to Use This Companion

The Gathering Table Facilitator Companion is the facilitation connection for leading coalition workshops. It's designed to be used alongside the Coalition Workbook. Each workshop in the Companion matches exactly with the Workbook — activities, steps, and outputs are fully aligned — with added timed agendas, facilitator tips, and prep checklists to support smooth delivery.

References to specific tools and activities are noted — the full participant-facing instructions for those tools are in the Coalition Workbook.

- **Use the agenda tables** to stay on track and ensure all voices are included. This Companion does not duplicate documentation pages — all decisions, notes, and data are intended to be captured in the Coalition Workbook.

Rotating Facilitation

We recommend coalition facilitation rotate among members. This Companion is designed so any member can pick it up and lead a workshop, even if they have not facilitated before.

Before the meeting: Review the Companion, prepare materials, and coordinate with any co-facilitators.
During the meeting: Follow the agenda, keep time, and ensure even participation by all (intend to invite the quieter voices to share).

After the meeting: Ensure the Workbook is updated and that follow-up tasks are clear.

Connecting to the Coalition Workbook

This Companion and the Workbook are meant to be used side-by-side:

- **The Workbook** records decisions, tracks members, documents priorities, and develops SMARTIE goals.
- **The Facilitator Companion** is your step-by-step "how-to" for running the workshops effectively.

Coalition Roadmap

The coalition-building process is organized into a sequence of six workshops, each building on the one before it. Ongoing Practices help the coalition maintain momentum, adapt to change, and sustain strong relationships between workshops.

How to Read This Roadmap:
Think of this as your coalition's journey map. Each workshop is a milestone that moves the group from initial connection 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 implementation.

While you can adapt the pace and format to fit your coalition, the sequence is designed to ensure you have the relationships, information, and agreements in place before moving into action. Ongoing Practices keep your coalition healthy and responsive between workshops.

Workshop	Focus
Workshop 0 – Coalition Foundations & Pre-Work	Clarify purpose, identify who needs to be at the table, plan outreach, and design your coalition launch.
Workshop 1 – Coalition Launch & Starting Your Snapshot	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 Your Community Food System Snapshot	Review and update the Snapshot; identify gaps; create a plan to gather missing information and perspectives.

Workshop 3 – Sensemaking & Setting Priorities	Refine themes from the Snapshot; select coalition priorities; draft priority statements; begin shaping structure and roles.
Workshop 4 – SMARTIE Goal Setting	Translate priorities into **SMARTIE** goals (Specific, Measurable, Achievable, Relevant, Time-bound, Inclusive, Equitable); assign leads and check-ins.
Workshop 5 – Action Planning for SMARTIE Goals	Build action plans with tasks, timelines, partners, resources, and a tracking process.
Workshop 6 – Reflection & Celebration	Reflect on progress and learning; select community-centered metrics; celebrate wins and adjust course.
Ongoing Practices	Quarterly/seasonal rhythm for coalition health tracking, learning gatherings, sustainability & succession planning, and embedding reflection into regular meetings.

💡 **Tip:** Each workshop has a corresponding section in the *Gathering Table Guide* that provides context, facilitation tips, and connections to the bigger coalition-building process.

Workshop 0 – Coalition Foundations & Pre-Work

📖 *Main Guide Reference: The Gathering Table, Part 0 – Getting Started (Sections 0.1–0.5)*
📝 *Workbook Connection: Workshop 0, Activities 1–5*
⏰ *Estimated Total Time: 2–3 hours (can be split into 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 invitation plan.
- Oriented to and started the Community Food System Snapshot Tool.
- Drafted a flow and agenda for your coalition's launch event.

Facilitator Prep Checklist

☐ Large chart paper or whiteboard for group synthesis and notes

☐ Sticky notes, markers, and pens

☐ Sign-in sheet and name tags (if in-person)

☐ Snacks and beverages (if possible)

☐ Copies of Coalition Workbook pages for Workshop 0

☐ Example outreach messages from Workbook (Activity 3)

☐ Draft Coalition Launch Agenda template from Workbook (Activity 5)

☐ Digital access to the Community Food System Snapshot Tool

💡 *Tip: If possible, co-facilitate with one person focused on timekeeping and one on group dynamics.*

Agenda

Time	Activity	Purpose
20–30 min	Clarify Coalition's Purpose	Align on why the coalition is forming and what success looks like.
45 min	Initial Coalition Outreach	Identify who needs to be at the table; map representation gaps.

45 min	Introducing the Idea	Develop inclusive invitation strategies and draft messaging.
30–40 min	Pre-Launch Data Scan	Familiarize conveners with the Snapshot Tool; begin populating baseline data.
40 min	Coalition Launch Plan	Design the flow and agenda for the first coalition gathering.
10–15 min	Wrap-Up & Next Steps	Confirm outreach/data assignments and prepare for Workshop 1.

Activity 1 – Clarify Your Coalition's Purpose (20–30 mins)

📒 **Workbook Reference:** *Workshop 0, Activity 1*

Purpose: To align the core team on why the coalition is forming and what the launch meeting should accomplish.

Facilitation Steps

1. **Individual Reflection (5 min):**
   - Prompt:
     - 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?
   - Encourage participants to jot down quick responses in the Workbook.
2. **Small Group Share (5–10 min):**
   - Pair or trio shares.
   - Ask groups to circle repeated nouns (outcomes) and verbs (actions).
3. **Whole Group Synthesis (10 min):**
   - Collect common words/phrases on chart paper or digital doc.
   - Cluster ideas into themes (e.g., "access","markets", "healthy food").
4. **Draft Purpose Statement (5 min):**
   - Use sentence starters:
     - *Our coalition exists to… so that…*
     - *We are a coalition of [who] committed to [values] so that [outcome].*

Outputs

- Draft purpose statement (1–3 sentences).
- Notes saved in Workbook.

💡 **Facilitator Tips**

- Use a round-robin share to ensure everyone's voice is heard.
- Emphasize that this is a **draft** — it will evolve after the Coalition Launch (Workshop 1).

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

📒 *Workbook Reference: Workshop 0, Activity 2*

Purpose: To ensure the coalition launch includes diverse, representative voices.

Facilitation Steps

- ○ Use the Coalition Tracking Document
2. **Reflect & Discuss (15 min):**
   - ○ Prompts:
     - ■ Who is directly affected by food system challenges?
     - ■ Who has lived experience that should guide the coalition's work?
     - ■ Who is missing from past conversations?
     - ■ Who holds decision-making power or influence?
3. **Sector Representation Checklist and identify gaps (15 min):**
   - ○ Walk through each sector in the Workbook and discuss who is already identified
   - ○ **Gap Analysis**
     - ■ Who is missing?
     - ■ Which sectors are under- or over-represented?
4. **Assign Outreach Responsibilities (15 min):**
   Decide who will contact whom, by when, and how (phone, email, in person).

Outputs

- Completed representation checklist.
- Notes on missing voices and gaps.

💡 **Facilitator Tips**

- Push beyond "usual suspects." Encourage naming youth, elders, marginalized groups.
- Use sticky notes or index cards to make the mapping interactive.

Activity 3 – Introducing the Idea (45 mins)

📒 **Workbook Reference:** *Workshop 0, Activity 3*

Purpose: Support the coalition in developing an inclusive outreach strategy and crafting invitation messages.

Facilitation Steps:

1. **Frame the Activity** (3–5 min)
   - Say: "Who we invite and how we invite them will shape the coalition's culture. Today, we'll design messages and outreach that feel welcoming, inclusive, and inspiring."
2. **Plan Outreach Assignments** (10–15 min)
   - Ask: *Who will reach out to whom, and how?*
   - Capture names, methods, and deadlines on flip chart or shared doc.
3. **Craft Invitation Messages** (20 min)
   - Small group or whole-group brainstorm: draft short, clear "elevator pitches."
   - Share example messages (from the Workbook) to spark creativity.
   - Facilitation tip: Push the group to keep messages simple enough for anyone to repeat.
4. **Refine & Confirm** (5–7 min)
   - Confirm outreach assignments and finalize 2–3 agreed invitation messages.

Outputs:

- Coalition outreach plan with clear assignments.

- 2–3 short invitation messages that feel inclusive and aligned with coalition values.

Facilitator Tips:

- Encourage role play: Have participants practice saying the elevator pitch aloud to catch jargon.
- Watch for missing audiences: If the same "usual suspects" are listed, ask "Whose voices do we need to intentionally invite?"
- Keep the energy creative — treat this like writing a slogan or campaign pitch.

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

📝 **Workbook Reference:** *Workshop 0, Activity 4*

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).

Facilitation Steps

1. **Tool Walkthrough (10–15 min):**

   - Open Snapshot Tool.
   - Review layout (5 sectors + supporting assets).
   - Explain: each row is a **prompt**, not a report.
   - 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: 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?*

- ○ Reinforce: *This is a living document that will grow throughout Workshops 2–3.*

- **Data Source Brainstorm (15–20 min):**

  - ○ Prompt: *"What reports, articles, or datasets do we already have?"*

  - ○ Start with 3–5 baseline sources (not everything at once). Remind: the Snapshot is about patterns, not perfection.

  - ○ Share common sources as examples:
    - ■ **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 known local sources directly into the tool (or sticky notes if offline).

- **Practice Entry (10–15 min):**

  - ○ As a group, pick one sector tab (e.g., *Production*).
  - ○ Enter 2–3 data points (e.g., # of cattle operations, % farms selling direct).
  - ○ Use the "Notes" or "Gaps" column to capture what's missing or unclear.
  - ○ Ask: *"What do we notice about strengths, gaps, or trends?"*

- **Identify Immediate Next Steps (5–10 min):**

  - ○ Highlight sectors with clear data gaps that need coalition follow-up.
  - ○ Assign 1–2 conveners to gather additional data before Workshop 1.
  - ○ Record assignments and deadlines in the Workbook.

Outputs

- Conveners oriented to the Snapshot Tool.
- First entries made in at least one sector.
- Short list of priority data sources to gather before Workshop 1.

💡 Facilitator Tips

- Stress *"progress, not perfection."* Don't let the group get stuck on filling every box.
- Show a sample filled-in Snapshot (if available) to make the exercise concrete.
- Keep energy high by alternating between naming gaps and celebrating strengths.

- Watch for over-reliance on numbers — encourage balancing data with stories and local knowledge.

Activity 5 – Coalition Launch Plan (40 mins)

📖 *Guide Reference:* *Section 0.5 – Why Intentional Gatherings Set the Tone*
📝 *Workbook Reference:* *Workshop 0, Activity 5*

Purpose: Design the coalition's first full-group gathering.

Facilitation Steps

1. **Frame the Task (5 min):**
   - Reminder: the launch sets culture and energy.
2. **Plan the Event (25 min):**
   - Use Workbook prompts:
     - What's the purpose of the launch?
     - Who's invited, and why?
     - What story/context will we open with?
     - Which activities (visioning, agreements) will we include?
     - What supports (food, childcare, translation) are needed?

3. **Draft Agenda (10 min):**
   - Use Workbook's Draft Launch Agenda template.
   - Confirm facilitators, roles, and logistics.

Outputs

- Draft Coalition Launch Plan.
- Draft agenda saved in Workbook.

💡 **Facilitator Tips**

- Balance inspiration with logistics. Keep flow engaging, not rigid.
- Explicitly plan for accessibility: food, stipends, childcare, language access.

Wrap-Up & Next Steps (10–15 mins)

Purpose: To leave the convening group with clarity, momentum, and specific tasks that prepare them for the Coalition Launch and Workshop 2.

Facilitation Steps

1. **Remind about Data Gathering (2–3 min)**
   - Say: *"Please bring any reports, articles, or datasets about the local food system to Workshop 2. These could be state reports, local surveys, or even informal notes from past projects."*
   - Confirm: who already has documents they can share?
2. **Encourage Outreach (2–3 min)**
   - Say: *"Before we meet again, talk with 1–2 community contacts. Share what we're working on, and listen for insights, stories, or missing voices. These conversations will strengthen our Snapshot."*
   - Capture a few names on the board to make this concrete.
3. **Confirm Assignments (3–4 min)**
   - Review assignments from earlier activities:
     - Outreach contacts
     - Data follow-ups
     - Launch logistics (venue, food, childcare, etc.)
   - Confirm deadlines and who will check in on progress.
4. **Preview Workshop 2 (1–2 min)**
   - Say: *"When we come back together, the first thing we'll do is review and expand the Snapshot. Then we'll plan how to fill the gaps. So please bring your notes, stories, and any data you've gathered."*
5. **Close with Reflection (2–3 min)**
   - Invite one participant to share:
     "What's one takeaway or story about why this work matters to you?"
   - Thank the group and affirm progress: *"You've built strong foundations today. Now we're ready to widen the circle."*

Outputs

- Clear expectations for outreach and data gathering.
- Confirmed assignments with deadlines.
- Energy and purpose carried into Workshop 1 and Workshop 2.

💡 **Facilitator Tips**

- Keep this section focused on *clarity + inspiration* — not new planning.
- Write assignments where everyone can see them (flip chart or shared doc).
- End on a human note (story, gratitude, or a shared laugh) so people leave energized.

✅ **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 will focus on building relationships, creating a shared vision, and establishing coalition values and agreements.

Workshop 1 – Launching the Coalition & Starting Your Snapshot

📖 *Main Guide References:*

- *Section 1.1 – Your Coalition Launch (Vision, Values, Agreements)*
- *Section 1.2 – Building a Shared Understanding (Snapshot as a living record; mini-orientation)*

📝 *Workbook References: Workshop 1, Activities 1–5 (+ Activity 4: Snapshot Mini-Orientation & Homework)*

⏰ **Estimated Total Time:** 3–3.5 hours (can be split into two sessions)

Purpose: This is the coalition's **first full-group gathering**. The focus is on inspiration, connection, and building the trust and shared foundations needed for collaborative work. By the end, the coalition will have a shared vision, values, agreements, and a basic plan for gathering baseline information for the Community Food System Snapshot Tool before Workshop 2.

Facilitator Prep Checklist

☐ Post agenda in a visible place (projected or large chart)

☐ Projector/large paper for Snapshot Tool demo

☐ Sticky notes, markers, large chart paper or whiteboard

☐ Printed visioning templates (postcards, seed packets, quilt squares, etc.)

☐ Props (optional) for creative visioning activities

☐ Copies of Coalition Values & Group Agreements templates (Workbook)

☐ Example completed Snapshot Tool (for demonstration)

💡 **Tip:** *Assign roles: one lead facilitator, one timekeeper, one "harvester" (capturing outputs into the Workbook or chart paper).*

Agenda

Time	Activity	Purpose
25 min	Coalition Introduction (Welcome, Story, Introductions)	Ground coalition in its story; build belonging and connection.
40 min	Visioning Activity	Co-create an aspirational vision of a thriving food system.
30 min	Coalition Values Clarification	Identify and agree on shared values to guide coalition culture.
20 min	Group Agreements	Draft agreements to support safe, inclusive collaboration.
15–20 min	Snapshot Mini-Orientation & Homework	Introduce the Snapshot Tool; assign baseline data gathering.
10–15 min	Wrap-Up & Next Steps	Confirm Snapshot assignments and preview Workshop 2.

Coalition Introduction – Welcome, Story, and Introductions (25 mins)

📖 *Guide Reference: Section 1.1 – Coalition Purpose and Shared Agreements*

📒 *Workbook Reference: Workshop 1, Activity 1*

Purpose: Ground the coalition in its story, acknowledge place, and build personal connections.

Facilitation Steps

1. **Set the Tone (5 min):**
   ○ Share the coalition origin story: *"Here's why this coalition came together and why it matters right now."*
   ○ If it feels appropriate, take a moment to acknowledge your community, its history, and a history of the land and the food traditions associated with it.
2. **Introductions (15 min):**
   ○ Round-robin introductions. Each person shares:
     ■ Name and role in the community (formal or informal).
     ■ *One food that represents their connection to this place.*
   ○ Encourage brief answers to keep energy high.
3. **Participation Guidelines (5 min):**
   ○ Introduce respectful collaboration practices (e.g., step up/step back, "one mic, many voices").

Outputs

● Shared sense of purpose, belonging, and connection.

💡 Facilitator Tips

● Use an object (e.g., a basket or talking piece) to pass around during introductions to slow the pace and create ritual.
● Model vulnerability by sharing your own story briefly first.

Activity 1 – Visioning Activity: Envisioning a Thriving Local Food System (40 mins)

📖 *Guide Reference: Section 1.1.1 – Clarifying Purpose and Shared Vision*

📙 *Workbook Reference: Workshop 1, Activity 2*

Purpose: Spark imagination and co-create a vision of a thriving and resilient food system that is available and accessible to everyone in the community.

Facilitation Steps

1. **Choose a Creative Visioning Method (20–25 min):**
   - Options: Postcards from the Future, Soundscape, Seed Packets, Quilt Squares, Future Farmers' Market Booth.
   - Invite participants to create artifacts using markers, collage, or words.
2. **Gallery Walk or Show-and-Tell (10–15 min):**
   - Display visions. Invite participants to walk, read, and notice themes.
   - Option: 2-minute share per person.
3. **Identify Common Themes (15–20 min):**
   - Cluster visions into themes.
   - Optionally, draft a shared vision statement.

Outputs

- Coalition's creative vision artifacts.
- List of common themes.
- Optional draft vision statement.

💡 **Facilitator Tips**

- Encourage symbolic, playful, and artistic expression — not just words.
- Remind the group: this is **aspirational**, not constrained by resources yet.

Activity 2 – Coalition Values Clarification (30 mins)

📖 *Guide Reference: Section 1.1.2 – Coalition Values*

📒 *Workbook Reference: Workshop 1, Activity 3*

Purpose: Name shared values and behaviors that will guide coalition culture.

Facilitation Steps

1. **Individual Reflection (5 min):** Each member writes 3–5 values/behaviors important in group work.

2. **Small Group Sharing (10 min):** In trios, identify common threads.
3. **Whole Group Clustering (10 min):** On chart paper, cluster similar values (e.g., partnership, trust, transparency, accountability → **Collaboration & Trust**).
4. **Finalize (5 min):** Choose 4–6 core values with short working definitions.

Outputs: Coalition's values list with definitions.

💡 **Facilitator Tips**

- Push for values expressed as **behaviors** (e.g., "showing up prepared," instead of "accountability").
- Use stickers or dots for democratic selection if the list is long.

Activity 3 – Group Agreements (20 mins)

📖 *Guide Reference: Section 1.1.3 – Building Agreements for Collaboration*

📒 *Workbook Reference: Workshop 1, Activity 4*

Purpose: Develop actionable agreements that invite and support respectful participation by everyone.

Facilitation Steps

1. **Individual Reflection (5 min):** Write: *What helps me feel safe and heard?*
2. **Share & Cluster (10 min):** Collect responses and group similar ideas.
3. **Draft Agreements (5 min):** Finalize 5–10 agreements, specific and actionable.

Outputs: Coalition's group agreements, documented and visible.

💡 **Facilitator Tips**

- Revisit agreements regularly; remind the group they can evolve.
- Suggest starting with examples (e.g., "Assume best intent, attend to impact").

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

📖 *Guide Section: 1.3 (Shared Understanding)*
📔 *Workbook Reference: Workshop 1 – Activity 4*

Purpose: To give coalition members a hands-on introduction to the Community Food System Snapshot Tool so they understand its purpose and structure. This prepares them for "homework" assignments to gather baseline information before Workshop 2.

Facilitation Steps

1. Introduce the Tool (5 min)

- Say: "The Snapshot Tool is our coalition's shared 'living record' of the food system. It's not a one-time report — it's something we'll build together throughout the process."
- Briefly explain the five sectors:
    - **Cultivation & Harvesting**
    - **Processing & Transformation**
    - **Aggregation & Distribution**
    - **Purchasing & Nourishment**
    - **Conservation & Stewardship**

2. Walk Through Structure (5–10 min)

- Project or share the tool digitally.
- Show that each sector has four key sections:
    - **Strengths/Great Things** → what's working well
    - **Questions/Gaps** → what's missing, uncertain, or challenging
    - **Stakeholders to Connect With** → people or orgs who should be included
    - **Secondary Data Sources** → reports, directories, datasets

- Emphasize: "This tool values both data and stories. Numbers give us one lens; lived experience gives us another."

3. Homework Brief & Assignments (5 min)

- Each participant chooses (or is assigned) **one sector**.
- Instructions: Before Workshop 2, add at least:
  - 1 strength/great thing
  - 1 question or gap
  - 1 stakeholder or data source
  - *(Optional)* A short story/example that illustrates one of the above
- Clarify how to record: show participants the shared digital link, spreadsheet, or document where they'll contribute.

Outputs

- Coalition members oriented to the Snapshot Tool and its purpose.
- Each person leaves with a clear homework assignment.
- A stronger, community-grounded starting point for the deeper dive in Workshop 2.

💡 Facilitator Tips

- Use an analogy: "Think of the Snapshot as our coalition's scrapbook — it's a place where we'll collect data, stories, and contacts as we go."
- Keep the demo concrete: Fill in one row together as an example.
- Encourage pairing: If someone is new, pair them with another member to complete their homework.
- Normalize imperfection: "This isn't about filling every box — it's about capturing what we know now and where we need to learn more."

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

Facilitation Steps

1. **Confirm Assignments (3–4 min)**
   - Say: *"Earlier in Activity 4, we mapped out who will gather which data and stories for the Snapshot. Let's do a quick check to confirm those assignments so everyone leaves clear."*
   - Briefly recap sector/asset assignments (e.g., "Jamie + Alex: Markets sector; Maria: Processing; Devin: Policy/land use").

2. **Encourage Follow-Through (2–3 min)**
   - Invite participants to connect with their community contacts, bring relevant reports/articles, and jot down observations between now and Workshop 2.
   - Reinforce: "Don't worry about being comprehensive — just bring what you can. This is about starting to fill the Snapshot with real, local knowledge."

3. **Preview Workshop 2 (2–3 min)**
   - Say: *"Next time, we'll begin by reviewing and expanding the Snapshot with what you've gathered, then move into power mapping and insight gathering planning."*
   - Emphasize continuity: "What you bring will directly shape how we see the system together."

4. **Close with Reflection (3–4 min)**
   - Quick go-round prompt: *"One word or phrase for how you're leaving today."*
   - Capture a few on the board or in notes if you want to track energy over time.

Outputs

- Confirmed clarity on homework assignments (from Activity 5).
- Shared understanding of expectations before Workshop 2.
- Coalition leaves with renewed energy and closure.

Workshop 2 – Reviewing & Expanding Your Community Food System Snapshot

📖 *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 Total Time: 3 hours

Purpose: To decide how the coalition will work together, orient members to the Community Food System Snapshot Tool, practice using it, and plan how to address the most important gaps in knowledge or representation.

Facilitator Tips & Troubleshooting

- **Make data visible and tangible:** Use large printed charts, posters, or projected visuals so participants can walk through and interact with the Snapshot information.
- **Offer multiple contribution channels:** Use sticky notes, small group breakouts, and one-on-one pairing so both outgoing and quieter members can contribute.
- **Guard against data overload:** Help participants focus by clustering related points and summarizing patterns as you go.
- **Slow the rush to solutions:** Remind the group that the goal here is to understand the picture, not solve problems yet.
- **Check for missing voices early:** Prompt members to notice whose perspectives are absent and note them for gap-filling before moving to priorities.

- **Balance representation in outreach planning:** In Activity 3, make sure outreach plans include diverse sectors and underrepresented voices.
- **Keep themes plain and clear:** When participants start to name emerging themes, encourage plain language that would make sense to someone outside the coalition.

Agenda

Time	Activity	Purpose
10 min	Welcome & Reflections	Reconnect; frame today's focus.
50–60 min	Choosing Structure, Leadership, Decision-Making	Decide on coalition structure, leadership style, decision-making approach, and initial roles.
25 min	Snapshot Tool Orientation	Introduce tool's sectors and structure.
30 min	Snapshot Deep Dive	Practice using the Snapshot; expand entries in multiple sectors.
45–60 min	Gap Identification & Planning	Identify missing voices/data; create a plan to address gaps.
10–15 min	Wrap-Up & Next Steps	Confirm assignments and preview Workshop 3.

Introduction (10 mins)

- Welcome everyone back.
- Invite each person to share one key takeaway from Workshop 1 or something they've noticed since then.
- Frame today's focus: moving from *vision + values → structure + shared picture of our food system*.

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 assign initial roles.

Facilitation Steps

- **Set the Stage (5 min):**
  - Say: "Clear structures help us avoid confusion and build trust. These choices can evolve over time, but we need a starting point."
- **Coalition Format (10 min):**
  - Present options (Informal, Formal, Time-Limited, Ongoing).
  - Ask: "Which format feels right for us now, and why?"
  - Capture decision + rationale on flipchart or shared doc.
- **Leadership Options (10 min):**
  - Review styles (Rotating, Shared Team, Anchor Organization).
  - Ask: "Which approach fits our values and capacity?"
- **Decision-Making Approach (10 min):**
  - Options: Consensus, Majority, Hybrid.
  - Facilitate short discussion on pros/cons.
  - Agree on one to pilot.
- **Assign Initial Roles (15–20 min):**
  - Use Appendix C. Focus on filling key roles: Facilitator, Note-Taker, Outreach/Engagement Lead, Snapshot/Data Coordinator.
  - Capture names visibly (flipchart, shared doc).
  - Confirm responsibilities.

Outputs

- Coalition structure, leadership, and decision-making style selected.
- Initial roles assigned and documented.

Facilitator Tips

- Remind the group: "These are starting points — we can revisit after a few months."
- Encourage multiple people to step up, to avoid over-reliance on a few.

Activity 2 – Snapshot Tool Orientation (25 mins)

📖 *Guide Reference: Section 2.1 – Snapshot Orientation & Deep Dive*

📒 *Workbook Reference: Workshop 2, Activity 2*

Purpose: Introduce coalition members to the Snapshot Tool's sectors and structure.

Facilitation Steps

- **Introduce the Tool (5 min):**
    - Share the five sectors:
        - Cultivation & Harvesting
        - Processing & Transformation
        - Aggregation & Distribution
        - Purchasing & Nourishment
        - Conservation & Stewardship
    - Say: "These represent the flow of food — from how it's grown to how land and water are sustained."
- **Walk Through Structure (10 min):**
    - Show how each sheet includes: Common Tactics, Questions, Strengths, Gaps, Stakeholders, Data Sources.
    - Emphasize balance between **numbers and stories**.

- **Show an Example (5 min):**
  - Use a sample sector to demonstrate entries.
  - Highlight how strengths and gaps connect to future projects.
- **Clarify Role (5 min):**
  - Say: "The Snapshot is our coalition's single source of truth. We'll use it in every stage of the process."

Outputs

- Coalition understands Snapshot sectors and structure.
- Members see how the tool will be used in future workshops

Activity 3 – Snapshot Deep Dive (30 mins)

📖 *Guide Reference: Section 2.1 – Applied Walkthrough*
📒 *Workbook Connection: Workshop 2, Activity 3*

Purpose: Practice using the Snapshot Tool as a group.

Facilitation Steps

- **Recap (5 min):**
  - Say: "This tool was introduced in Workshop 0, but now we'll practice as a full coalition."
- **Walk Through One Sector (10 min):**
  - Choose one (e.g., Cultivation & Harvesting).
  - Demonstrate identifying strengths, gaps, stakeholders, and data sources.
  - Example: "Strong cattle production = strength. Lack of vegetable processing = gap. Stakeholders = farmer's market board. Data source = USDA Ag Census."
- **Small-Group Exploration (10 min):**
  - Assign sectors to groups.
  - Each group identifies 1–2 strengths, gaps, stakeholders, and data sources.

- **Report Back & Reflection (5 min):**
  - Groups share highlights.
  - Capture on shared doc.
  - Reinforce: "This is a living document that grows over time."

Outputs

- Initial entries added to multiple sectors.
- Coalition members gain comfort using the tool.

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

📖 *Guide Reference: Section 3.1 Why a Gap Plan Matters, Section 2.6 Power Mapping*

📒 *Workbook Reference: Workshop 2, Activity 4 – Gap Identification & Planning*

Purpose: Identify missing voices, sectors, or types of data in the snapshot, and plan how to gather what's missing.

Facilitation Steps:

- **Review Additions (5 min):**
  - Display the updated Snapshot Tool.
  - Say: *"Now let's look at what's still missing so we can plan to fill the most important gaps."*
- **Small-Group Brainstorm (15 min):**
  - Assign groups one or two sectors.
  - Ask: *"What voices, data, or perspectives are missing here? Why does it matter?"*
  - Encourage them to think about **representation gaps** (e.g., youth, Tribal leaders), **data gaps** (e.g., farm-to-school numbers), and **relationship gaps** (e.g., food workers).
- **Whole-Group Synthesis (15–20 min):**
  - Record findings in the **Gaps & Next Steps Table** (on flipchart or projected).

- Facilitate prioritization: *"Which 2–3 gaps, if left unaddressed, would make our picture incomplete or biased?"*
- Assign roles and deadlines for follow-up.

Outputs:

- Gaps & Next Steps Table completed with descriptions, responsible people, and deadlines
- Agreement on top priority gaps to fill before Workshop 3

Facilitator Tips

- Emphasize **progress over perfection**.
- Keep focus on the most consequential gaps, not everything.

Gaps & Next Steps Table

Gap Description	Missing Voice/Sector	Suggested Method (Interview, Survey, Focus Group, etc.)	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)

📖 *Guide Reference: Part 2 – Expanding the Picture*
📒 *Workbook Reference: Workshop 2 – Wrap-Up*

Purpose: End with clarity, accountability, and energy for Workshop 3.

Facilitation Steps

- **Summarize Outputs (3–4 min):**
  - Recap: structure decisions, Snapshot practice, priority gaps identified.
- **Confirm Assignments (3–4 min):**
  - Review outreach/data tasks and deadlines from the Gap & Next Steps Table.
- **Encourage Engagement (2–3 min):**
  - Say: "Talk with your networks, gather stories, and bring back data to enrich our Snapshot."
- **Preview Workshop 3 (1–2 min):**
  - Share: "Next session, we'll move from information to meaning — clustering themes and identifying project ideas."
- **Close with Reflection (2–3 min):**
  - Ask: "What's one insight or word you're taking from today?"

Outputs

- Clear follow-up assignments.
- Coalition leaves with direction and energy for Workshop 3

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 Total Time: 3 hours

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 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.

Facilitator Prep Checklist

☐ Print/post large sheets of themes from Snapshot review
☐ Prepare dot stickers or colored markers for voting/selection
☐ Print or project the Influence/Trust Grid template
☐ Print Project Development Worksheets (one per project idea)
☐ Gather markers, sticky notes, and flip chart paper
☐ Review coalition vision and values from Workshop 1

Agenda

Time	Activity	Purpose
30–40 min	Activity 1 – Data Review & Gallery Walk	Review full Snapshot; highlight observations, clarifications, and stories.
30–45 min	Activity 2 – Theme Clustering	Identify 4–7 themes summarizing the coalition's understanding.
30–40 min	Activity 3 – Power Mapping & Influence Grid	Identify stakeholders across influence and trust; plan engagement.
40–50 min	Activity 4 – Story-Based Strategy & Narrative Power	Surface dominant & counter-stories; discuss narrative strategy.
90–110 min	Activity 5 – From Themes to Project Ideas	Translate themes into draft project ideas.
10–15 min	Wrap-Up & Transition	Confirm outputs; preview SMARTIE Goal setting in Workshop 4.

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 full set of data gathered so far, reflect on what stands out, and add missing context.

Purpose: Review the full set of data gathered so far, reflect on what stands out, and add missing context.

Facilitation Steps

- Prepare the space: Print or project each sector/asset area from the **Community Food System Snapshot Tool** around the room.
- Invite participants to walk around in gallery walk style, adding observations, clarifications, missing data points, questions, or stories.
- Assign a notetaker at each station to ensure additions are captured.
- Reconvene as a full group and highlight early patterns or surprises.

Facilitator Tips

- Encourage story prompts: *"When have you experienced this dynamic in real life?"*
- Emphasize that the goal is a richer snapshot, not perfection.
- Balance voices: pair quieter participants so they can discuss before sharing out.
- Keep momentum with a clear timebox for the walk and reflection.

Outputs

- A visually updated map of the coalition's data
- Early identification of emerging themes

Activity 2 – Theme Clustering (30–45 mins)

📖 *Guide Reference: Section 3.3 – Setting Priorities Collaboratively*
📒 *Workbook Reference: Workshop 3 – Activity 2*

Purpose: Help the coalition move from raw data to 4–7 themes that reflect their shared understanding of the local food system.

Facilitation Steps

- Display all observations and notes from Activity 1.
- Ask members (in pairs or small groups) to cluster related ideas.
- Facilitate a whole-group discussion to name each cluster in clear, accessible language.
- Guide the group toward identifying 4–7 themes that summarize the coalition's shared understanding.

Facilitator Tips

- Emphasize that themes are storylines, not categories — they should describe dynamics or issues, not just topics.
- Test clarity: ask, *"Would someone outside this coalition understand what this theme means?"*
- Encourage "complete picture" checks: whose experiences or voices might be missing?
- Use strategies like round-robin or pair-share to ensure quieter voices are included.

Outputs

- A set of 4–7 named themes written on flip charts or in the Workbook

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: Help the coalition identify where trust and influence lie, and use that to inform outreach and engagement strategy.

Facilitation Steps

- Brainstorm a list of stakeholders across sectors (individuals, organizations, agencies, cultural leaders, businesses, funders).

- Project or post the Influence/Trust Grid. Place stakeholders into quadrants:
  - High Influence / High Trust = key allies and partners
  - High Trust / Low Influence = community anchors
  - High Influence / Low Trust = potential blockers, need bridge-building
  - Low Influence / Low Trust = monitor only
- Facilitate discussion: *Why is this stakeholder placed here? Do we agree?*
- Circle the 6–10 most critical stakeholders to engage moving forward.
- Record outreach ideas: who will connect, how, and by when.

Facilitator Tips

- Frame the grid as a planning tool, not a judgment of people's worth.
- Push for nuance: trust and influence are not the same.
- Call out inclusivity gaps — who is highly trusted but underrepresented, or powerful but disconnected?
- Use role play if helpful: *"If this stakeholder were here, what would they say?"*
- Remind participants this is a **living map** — relationships shift over time and the grid should evolve.

Outputs

- Completed Influence/Trust Grid

- Notes on engagement actions (who, how, by when)
- Insights on inclusivity gaps and representation

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

📖 *Guide References: Section 2.4 – Story & Narrative Power; Section 3.1 – Why Narrative Power Matters*
📔 *Workbook Reference: Workshop 3 – Activity 4*

Purpose: To surface and shift the stories that shape how people see your food system, strengthening your coalition's narrative power. By naming dominant narratives and co-creating counter-stories, the coalition begins to identify how storytelling can support equity, inclusion, and momentum.

Facilitation Steps

1. **Frame the Activity (5 min)**
   Say: "Every food system is shaped by stories — about what's possible, who belongs, and what success looks like. Some of these stories limit imagination or reinforce inequities. Others open new possibilities. Today we'll surface both kinds."

2. **Identify Dominant Stories (10–15 min)**
   Prompt: "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 too expensive."
   Capture responses on flip chart paper or a shared digital board.

3. **Surface Counter-Stories (15–20 min)**
   Ask: "What counter-stories already exist that show resilience, possibility, or success?"
   Examples: "Our farm-to-school program doubled in three years," "Elders' traditional food knowledge sustains our community."
   Record these as parallel to the dominant stories.

4. **Discuss Narrative Strategy (10 min)**

   Use prompts to begin connecting stories to coalition strategy:

- Who needs to hear these counter-stories?
- Where can we share them?
- How can we ensure stories are told *with* people, not *about* them?

Encourage participants to start drafting early narrative strategies or communication ideas.

Facilitator Tips

- Push for specificity: Capture real phrases people say in the community.
- Use small groups for surfacing stories if the room is large, then bring them back together.
- Remind participants: Stories are powerful because they connect to identity, values, and belonging — not just facts.
- If appropriate, bring in a story prompt (short video, quote, or local newspaper headline) to spark thinking.

Outputs

- List of dominant and counter-stories.
- Early ideas for narrative strategies.

Activity 5 – From Themes to Project Ideas (90–110 mins)

📖 *Guide References: Section 3.2 – Sensemaking Rationale; Sections 3.3–3.4 – From Themes to Projects*
📙 *Workbook Reference: Workshop 3 – Activity 4*

Purpose: Guide the coalition in moving from themes to actionable project ideas, ensuring ideas are documented and aligned with coalition values.

Facilitation Steps

- **Review themes and priorities** from Activities 2 and 3.
- **Brainstorming round** (20–30 min): Encourage bold ideas, quick wins, and big visions. Remind participants: *no idea is too big or small at this stage.*
- **Refinement round** (20–30 min): Use guiding questions to check alignment, feasibility, equity, and measurability.
- **Document ideas** in the **Project Development tab** inside the 📁 **Project & Action Planning Toolkit**. Project or display the Toolkit so everyone can see it in use.
- **Group sharing**: Have each group pitch back ideas for quick feedback and refinement.
- **Prep for prioritization**: Narrow down to 2–3 projects per theme to bring into Workshop 4.

Facilitator Tips

- Keep fairness at the center: ask, *"Whose needs are we centering in this project?"*
- Balance scope: capture both "quick wins" and longer-term projects.
- Encourage differentiation: clarify which projects should be coalition-led versus partner-supported.
- Keep energy high: use sticky notes, clustering, drawing icons, or short pitches.

Outputs

- Several draft project ideas documented in **the Project & Action Planning Toolkit.**
- Clear rationale and alignment notes for each idea
- A manageable list of 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 Notes

- Review the outputs as a coalition:
  - 4–7 themes
  - Completed Power & Influence Grid
  - Dominant and counter-stories
  - Draft project ideas (recorded in the **Project & Action Planning Toolkit**)
- Confirm all worksheets and notes are collected and stored in the shared location.
- When noting draft project leads, tie them back to **Appendix C – Roles & Responsibilities Matrix** (e.g., Outreach Lead, Data/Snapshot Coordinator) so accountability is integrated with coalition structure.
- Close by previewing Workshop 4: Turning project ideas into SMARTIE goals.

Outputs

- Documented coalition themes, Power Map, stories, and project drafts
- Clear transition into SMARTIE goal-setting in Workshop 4

Workshop 4 – SMARTIE Goal Setting

📖 *Main Guide References: 3.4 Why Prioritize Transparently; 3.5 Why SMARTIE Goals (and Why Now)*

📒 *Workbook Reference: Workshop 4 – Activities 1–5; Appendix E (Project Prioritization Criteria Rubric); Appendix B (Community-Centered Metrics Examples)*

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 and weights. Then, the coalition refines the top priorities into SMARTIE goals that are **Specific, Measurable, Achievable, Relevant, Time-bound, Inclusive,** and **Equitable** (Fair).

By the end of this workshop, you will have:

- A scored & ranked list of potential projects
- Coalition agreement on the **top 3–5 priorities** (with rationale)
- Fully drafted **SMARTIE** goals, with leads and immediate next steps
- A clean handoff into Workshop 5 (Action Planning & Metrics)

Facilitator Prep Checklist

☐ Review draft project ideas from Workshop 3

☐ Open/duplicate the **Project Prioritization Matrix** (Excel/Google Sheet)

☐ Print/share **Appendix E: Project Prioritization Criteria Rubric** + scoring sheets

☐ Prepare a short **SMARTIE refresher** (include 1–2 weak/strong examples)

☐ Print **SMARTIE Goal Notes Tables** (one per priority)

☐ Arrange space for small-group + plenary; assign timekeeper & notetaker

☐ Set up projection for live scoring and goal edits

Agenda

Time	Activity	Purpose
60–75 min	**Activity 1 – Project Prioritization**	Score and rank project ideas using shared rubric; select top priorities.
20 min	**Activity 2 – SMARTIE Goals (Refresher)**	Align on SMARTIE definitions and examples.
20–30 min	**Activity 3 – Clarify Priorities Before Goal-Setting**	Draft short Priority Statements (who/why/what) to ground each goal.
50 min	**Activity 4 – Turn Priorities into Draft Goals**	In small groups, draft SMARTIE goals using Notes Tables.
70 min	**Activity 5 – Refine & Assign**	Review/refine goals in plenary; assign leads and next steps.
10–15 min	**Wrap-Up & Next Steps**	Confirm final goals; preview Workshop 5.

Activity 1 – Project Prioritization (60–75 mins)

📖 *Guide Reference: Section 3.4 – Why Prioritize Transparently*
📙 *Workbook Reference: Workshop 4 – Activity 1*
📂 *Tool:* ***Coalition Project Prioritization Matrix*** *(Excel/Google Sheet)*

Purpose
Evaluate projects fairly using shared criteria so that choices reflect coalition values, feasibility, cost, community impact, and alignment with priorities.

Facilitation Steps

- **Introduce the Process (10 min)**
  Frame this as building legitimacy and reducing friction through shared criteria, not "picking favorites."
- **Review Criteria (10 min)**
  Walk through the rubric categories with examples to clarify how each is scored.
- **Agree on Weighting (5 min)**
  Present suggested weights and invite adjustments if needed. Keep it simple.
- **Score Projects (20 min)**
  Ask participants to score individually or in pairs. Collect scores into the Matrix tool, which applies weights automatically.
- **Review Results (10 min)**
  Project the ranked totals. Ask: *Which results surprise you? Which reflect coalition values?*
- **Finalize Priorities (10–15 min)**
  Move toward consensus on the top 3–5 projects. Record both numeric scores and narrative rationale.

Facilitator Tips

- Use dot-voting or stickers before scoring as a warm-up to surface energy.
- If conflict arises, pause: invite members to share reasoning and listen before moving forward.
- Explicitly check for fairness: ask, *"Does this project reduce barriers or spread benefits fairly?"*
- If a project scores high but raises capacity concerns, note it and flag for later feasibility discussion.

Outputs

- Ranked list of projects scored against shared criteria
- Coalition agreement on 3–5 priorities
- Rationale captured alongside numeric results

Activity 2 – SMARTIE Goals (20 mins)

📖 *Guide Reference: Section 3.5 – Why SMARTIE Goals (and Why Now)*
📒 *Workbook Reference: Workshop 4 – Activity 2*
📄 *See Appendix B: Community-Centered Metrics Examples for ideas on how to define "measurable"*

Purpose: Help participants align on what SMARTIE means and why it matters before they begin drafting. Emphasize that Inclusive and Equitable are essential to moving beyond traditional goal-setting.

Facilitation Steps

- **SMARTIE Refresher (8–10 min)**
  Walk through each letter:
    - **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 resources, time, and capacity.
    - **R – Relevant**: Directly connected to coalition purpose and 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 barriers.
- **Compare Examples (6–8 min)**
  Share a weak vs. strong goal and ask, *"What makes the strong one stronger?"*
    - 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."

- ○ Optional: Pair-share for 2 minutes: *"What made the stronger examples more compelling?"*
- **Q&A (2–4 min)**
Clarify any confusing letters. Spend extra time on **Inclusive** and **Equitable** since these are often new or overlooked.

Facilitator Tips

- Keep a sample SMARTIE goal visible on a flip chart or projector for reference during later activities.
- Encourage participants to phrase goals in plain, community-friendly language.

Outputs

- Shared understanding of the SMARTIE framework, with emphasis on Inclusive and Equitable
- Examples of what makes a goal strong vs. weak that can be referenced later in the workshop

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

📖 **Guide:** *3.5 Why SMARTIE Goals (Priority Statement)*

📒 **Workbook:** *Workshop 4 – Activity 3*

Purpose: Ground each priority in values and the "who/why" before drafting the goal.

Facilitation Steps

1. **Small-Group Work (15–20 min)**
   - ○ For each selected priority, groups complete a **Priority Statement**:
     - ■ Why does this priority matter? (values/purpose)
     - ■ Who is most affected/involved?
     - ■ What change do we want to see?

Record your group's responses in the SMARTIE Goal Notes Table (see the Project & Action Planning Tool).

2. **Confirm Together (5–10 min)**
   ○ Capture statements visibly.
   ○ Check alignment: "Does this reflect our values and lived experience?"

Outputs: A short Priority Statement for each selected project/priority

Facilitator Tips

● Prompt plain language that can be shared with the public.
● Ask, "Whose voice is centered here? Who needs to be named?"

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

📖 *Guide Reference: Section 3.5 – Element-by-Element Drafting*
📙 *Workbook Reference: Workshop 4 – Activity 4*
📂 *Tool:* ***Project & Action Planning Toolkit → SMARTIE Goal Notes Table + Project Tracker***

Purpose: Support groups in translating their Priority Statements into SMARTIE goal drafts and capturing them in the Toolkit for later refinement.

Facilitation Steps

● **Group Assignments (2 min)**
  ○ Assign one small group per priority.
● **Complete SMARTIE Goal Notes (40–45 min)**
  ○ Ask groups to work letter by letter (S → M → A → R → T → I → E) in the Notes Table.
  ○ Push for specificity and robust Inclusive/Equitable details: *Who's at the table? How are benefits shared?*
● **Draft the Goal Statement (3–5 min)**

- Guide each group to write one concise goal sentence that captures all SMARTIE elements.
- Record: lead person/team, immediate next steps, check-in date.
- Ensure entries are captured in the Toolkit so they feed into the coalition's project tracker.

Facilitator Tips

- Circulate and listen for vague wording — ask, *"How will you measure inclusive or equitable progress?"*
- Encourage realistic scope (6–18 months) to sustain momentum.
- If groups stall, suggest starting with the Priority Statement they wrote in Activity 3 and "SMARTIE-izing" it step by step.

Outputs

- SMARTIE Goal Notes Tables completed for each priority
- Draft SMARTIE goal statement per priority, recorded in the Project & Action Planning Toolkit

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Activity 5 – Refine & Assign (70 mins)

📖 *Guide Reference: Section 3.5 (Refinement); 3.7–3.8 (Roles & Workload)*
📒 *Workbook Reference: Workshop 4 – Activity 5*
📂 *Tool: **Project & Action Planning Toolkit → SMARTIE Goal Notes Table***

Purpose: Guide the coalition in finalizing SMARTIE goals, capturing edits in real time, and confirming ownership so each goal has accountability built in.

Facilitation Steps

- **Present Drafts (20–30 min)**
  - Invite each group to present its SMARTIE goal (2–3 min each).
  - Display the goal on screen or chart paper so edits can be made visibly.
- **Feedback & Edits (25–30 min)**

- Prompt feedback with *"What works? What could improve?"*
    - Focus on tightening clarity, measurability, and equity/fairness.
    - Edit live in the **SMARTIE Goal Notes Table** (Toolkit) so everyone sees the changes.
- **Confirm Ownership (10–15 min)**
    - For each goal, confirm:
        - Lead person/team
        - Immediate next step(s)
        - Check-in date
    - Record final details in the Toolkit (SMARTIE Notes Table + Project Tracker).

Facilitator Tips

- Balance airtime: call on quieter voices during feedback rounds.
- Watch for load-balancing: don't let the same few people hold multiple lead roles.
- Pair newer members with experienced ones for co-leads to build shared capacity.
- Reinforce that ownership ≠ doing everything — it means coordinating and keeping momentum.

Outputs

- Finalized SMARTIE goals with edits incorporated
- Leads, co-leads, next steps, and check-in dates confirmed
- Updates recorded in the Project & Action Planning Toolkit

Wrap-Up & Next Steps (10–15 mins)

📖 *Guide: 3.6 Why Action Planning + Community-Centered Metrics Belong Together*
📒 *Workbook: Workshop 4 – Wrap-Up*

Purpose: Help the coalition affirm shared ownership of SMARTIE goals, connect leads to coalition roles, and set up a smooth handoff into Workshop 5.

Facilitation Steps

- **Read Back Final Goals (3–4 min)**
  Project or read aloud the finalized SMARTIE goals. Ask for coalition assent: *"Do these reflect where we want to focus?"*
- **Preview Next Steps (2–3 min)**
  Frame Workshop 5: *"Next time, we'll turn these into step-by-step action plans and select a few community-centered metrics to measure progress."*
- **Documentation (2–3 min)**
  Confirm where finalized goals will be stored (shared drive, Project & Action Planning Toolkit, Workbook) and who is responsible for circulating them.
- **Role Alignment (2–3 min)**
  Double-check that each finalized goal has a designated lead, and link leads back to roles in **Appendix C – Roles & Responsibilities Matrix**. This ensures accountability ties into the coalition's agreed structure.
- **Closing Round (2–3 min)**
  Invite each participant to share *"one word on how you're leaving today."*

Facilitator Tips

- Affirm the effort put into refining goals — celebrate the milestone.
- Watch for uneven distribution of leads; rebalance if the same people are carrying too much.
- Name the continuity: today's work flows directly into the planning and metrics work of Workshop 5.

Outputs

- Shared coalition commitment to SMARTIE goals

- Named leads aligned with Appendix C roles
- Clear documentation plan for finalized goals
- Smooth handoff into Workshop 5 (Action Planning & Metrics)

Workshop 5 – Action Planning for SMARTIE Goals

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

📖 *Use Appendix B – Community-Centered Metrics Examples to brainstorm and select metrics that reflect both numbers and stories*

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

Estimated Total 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, and resources. By the end of this workshop, the coalition will have detailed, ready-to-implement action plans for each goal and clarity on who is doing what, by when.

Facilitator Prep Checklist

☐ Print or project the **Action Planning Template** (Excel or large wall chart)
☐ Ensure the online/digital version is ready for live editing during the session
☐ Print coalition's finalized SMARTIE goals from Workshop 4 for reference
☐ Print examples from **Appendix B: Community-Centered Metrics**
☐ Bring markers, sticky notes, and flip chart paper for brainstorming
☐ Assign a timekeeper for each activity
☐ Review Ongoing Practices (reflection, sustainability planning) so you can preview how action plans connect to long-term coalition rhythms

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Facilitator Tips

- Keep the group focused — action plans should be specific enough to launch, without slipping into micro-details.
- Use the online **Action Planning Template** for live updates so refinements are captured in real time.

- Encourage **shared leadership** — distribute responsibilities across coalition members, not just a few.
- Highlight continuity: today's plans will be carried forward through Ongoing Practices (quarterly check-ins, reflection, adaptation).
- When discussing metrics, remind participants that *success can be measured by both numbers and stories*.

Agenda

Time	Activity	Purpose
15–20 min	Review Coalition Priorities & SMARTIE Goals	Confirm alignment on finalized goals before planning actions.
15 min	Introduce the Action Planning Table	Walk through how to use the shared planning/tracking tool.
65–70 min	Plan & Share	Develop detailed action steps in small groups; refine with coalition.
25–30 min	Choosing Community-Centered Metrics	Define success measures that reflect community priorities.
20–25 min	Wrap-Up & Next Steps	Confirm action plans, metrics, and accountability; close with reflection.

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 the coalition's 2–3 SMARTIE goals from Workshop 4 to ensure alignment before moving into action planning.

Facilitation Steps

- Welcome the group and restate today's purpose: "We're moving from goals to a concrete plan of action."
- Project or read aloud the coalition's 2–3 finalized SMARTIE goals from Workshop 4 (saved in the *SMARTIE Goals* tab of the **Project & Action Planning Workbook**).
- Ask: "Do these still feel aligned with our purpose and priorities?"
- Make quick clarifications or edits as needed before proceeding.
- Transition: Remind participants that the next step will use the *Action Planning* tab in the **Project & Action Planning Workbook** to turn these goals into concrete action steps.

Facilitator Tips

- Keep this brief. The focus is action planning, not rewriting goals.
- Acknowledge the work already done in Workshop 4 to build momentum and pride.

Outputs - Confirmed list of SMARTIE goals in the **Project & Action Planning Workbook** that will guide action planning.

Facilitation Steps

- Display or project the *Action Planning* tab from the **Project & Action Planning Workbook**.
- Walk through each column, explaining what belongs in it:
  - *Goal* → The SMARTIE goal this action supports
  - *Action Step* → A specific task or milestone. Break larger projects into smaller steps
  - *Lead Person/Team* → Who is responsible for making sure this step happens
  - *Partners* → Others who will assist, provide resources, or offer expertise

- - - *Timeline* → When this step should start and be completed
    - *Resources Needed* → Funding, materials, connections, approvals
    - *Status* → Not Started, In Progress, Completed
    - *Notes* → Additional details, updates, or follow-up items
  - Clarify that the Excel workbook is the coalition's **living project tracker** that will be updated over time.

Tool 📂 Project & Action Planning Workbook (tab: *Action Planning*)

Output - Coalition understands how to use the Action Planning Table as its shared planning and tracking tool.

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

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

📖 *Workbook Reference: Workshop 5 – Activity 3*

Purpose: Small groups develop action plans for each goal, then share and refine them with the full coalition.

Facilitation Steps

Breakout Work (20–25 min)

- Divide participants into small groups, assigning each group one SMARTIE goal.
- Direct each group to the *Action Planning* tab in the **Project & Action Planning Workbook**.
- Circulate to answer questions, encourage realistic timelines, distribute leadership fairly, and check inclusivity in action steps.

Report Back & Refine (45 min)

- Each group presents their draft plan (5–7 minutes each).

- Facilitate clarifying questions and feedback using prompts: *"What works? What could improve?"*
- Capture overlaps (combine similar tasks, align resources).
- Make live edits in the *Action Planning* tab as groups present.

Facilitator Tips

- Encourage groups to chunk tasks into achievable steps.
- Watch for over-reliance on the same individuals — redistribute leadership if needed.
- Highlight overlaps and opportunities for collaboration.

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; Appendix B – Community-Centered Metrics Examples*

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

Facilitation Steps

- Introduce the concept of metrics: emphasize both quantitative (numbers, counts, percentages) and qualitative (stories, testimonials, trust shifts).
- Share examples from **Appendix B – Community-Centered Metrics** across food system sectors.

- In small groups, have participants brainstorm 2–3 possible metrics tied to each SMARTIE goal.
- Bring groups back together to share ideas.
- As a full coalition, select a short list of 5–7 key metrics that:
  - Are realistic to track
  - Represent more than one sector
  - Reflect fairness and community priorities
- Record chosen metrics in the **Project & Action Planning Workbook** (*Action Planning* tab, "Metrics" column).

Facilitator Tips

- Encourage participants to think beyond numbers: *"How will people feel the change?"*
- Ensure that metrics reflect equity and fairness (e.g., are underrepresented voices benefiting?).
- Keep it simple: better to track 2–3 meaningful metrics than 10 superficial ones.

Outputs

- Shared set of 5–7 community-centered metrics
- Agreement on how and when metrics will be tracked

Wrap-Up & Next Steps (20–25 mins)

📖 *Guide Reference: Section 3.6 – Why Action Planning + Metrics Belong Together*
📖 *Workbook Reference: Workshop 5 – Wrap-Up*

Purpose: Finalize action plans and metrics, assign leads, and confirm coalition agreements for tracking and reporting progress.

Facilitation Steps

- Review final action plans and metrics as a full coalition, projecting the *Action Planning* tab in the **Project & Action Planning Workbook**.
- Confirm final leads for each action step and for metric tracking.
- Confirm who will maintain the workbook (digital version) as the coalition's ongoing tracker.
- Facilitate agreement on reporting rhythm (e.g., monthly check-ins, quarterly reflections).
- Close with a reflection: *"What's one step we're most excited to take as a coalition?"*

Outputs

- Finalized action plans with leads and metrics
- Assigned responsibility for progress tracking
- Clear plan for reporting and accountability

Workshop 6 – Reflection & Celebration & Adaptation (Optional)

📖 *Main Guide Reference: Section 3.7 – Reflection & Learning*
📒 *Workbook Reference: Appendix A – Coalition Health Tracking Worksheet, Appendix B – Community-Centered Metrics Examples*

 Estimated Total Time: 1.5–2 hours

Purpose: This optional workshop is a pause point for coalitions that want to take stock of progress, celebrate milestones, and intentionally adapt before moving forward. It emphasizes reflection, honoring contributions, and strengthening connections, while also aligning metrics for the next phase of work.

By the end of this workshop, your coalition will have:

- A shared list of successes, challenges, and lessons learned.
- 1–3 concrete adjustments or next steps for the coming season.
- A small set of meaningful, community-centered metrics to track progress.
- Renewed relationships and energy through celebration and recognition.

Facilitator Prep Checklist

☐ Print or project Reflection Prompts (see below)
☐ Print or share Appendix A – Coalition Health Tracking Worksheet
☐ Print or share Appendix B – Community-Centered Metrics Examples
☐ Bring flip chart paper, markers, or whiteboard
☐ Optional: Prepare certificates, thank-you cards, or recognition tokens
☐ Prepare a coalition timeline or milestone list from past meetings

Facilitator Tips

- **Set a positive tone:** This workshop is about learning and celebrating, not assigning blame.
- **Balance reflection and celebration:** Make time to honor people's contributions, not just talk about challenges.
- **Encourage all voices:** Use structured sharing (pairs, small groups, go-rounds) so everyone is heard.
- **Make success visible:** Use charts, visuals, or a coalition timeline to show what's been accomplished.

- **Keep metrics simple:** Focus on 5–7 measures that can realistically be tracked and matter to the community.
- **Close with gratitude:** End on an uplifting note with recognition or celebration.

Agenda

Time	Activity	Purpose
60–75 min	Reflection & Learning Conversation	Review coalition health, successes, challenges, and lessons learned.
20–30 min	Selecting Community-Centered Metrics	Choose 5–7 metrics that matter to the coalition.
15–20 min	Wrap-Up & Celebration	Confirm adjustments, assign metric leads, and celebrate progress.

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

📖 *Guide Reference: Section 3.7 – Reflection & Learning*
📙 *Workbook Reference: Appendix A – Coalition Health Tracking Worksheet*

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

Facilitation Steps:

1. **Set the tone** (5 min)
   - "This is a learning space for us to grow stronger together. Today is about reflection, celebration, and adaptation."
2. **Check-in round** (10 min)
   - Each participant shares one highlight from coalition work since the last workshop.
3. **Guided reflection prompts** (30–40 min)
   - 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 notes on flip chart/whiteboard or directly into Appendix A.
5. **Identify adjustments and commitments** (15–20 min)
    - As a group, agree on 1–3 concrete adjustments or next steps.
    - Assign responsibility for follow-up if needed.

Output:

- Shared list of successes, challenges, and lessons learned.
- 1–3 agreed adjustments for the next season.
- Updated Coalition Health Tracking Worksheet.

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

📖 *Guide Reference: Section 3.7 – Reflection & Learning*
📒 *Workbook Reference: Appendix B – Community-Centered Metrics Examples*

Purpose: Define a small set of meaningful metrics that reflect coalition values, goals, and community priorities.

Facilitation Steps:

1. **Review coalition priorities** (5 min)
    - Revisit SMARTIE goals and priorities chosen in Workshops 4–5.
2. **Introduce metrics** (5 min)
    - Explain that metrics include both:
        - Quantitative (numbers, counts, % change)
        - Qualitative (stories, testimonials, examples)
    - Share examples from Appendix B across sectors:
        - Cultivation & Harvesting
        - Processing & Transformation
        - Aggregation & Distribution
        - Purchasing & Nourishment
        - Conservation & Stewardship
3. **Small group brainstorm** (10 min)
    - Each group generates 2–3 possible metrics tied to one SMARTIE goal.

4. **Coalition selection** (10 min)
    ○ Groups share their ideas.
    ○ As a coalition, select 5–7 metrics to track across goals.
    ○ Record selections in Appendix A or Action Planning tables.

Output:

- 5–7 agreed metrics that reflect both numbers and stories.
- A plan for how and when data will be tracked.

Wrap-Up & Celebration (15–20 mins)

📖 *Guide Reference: Section 3.7 – Reflection & Learning*
📒 *Workbook Reference: Appendices A & B*

Facilitation Steps:

1. Summarize key takeaways from reflection and metrics activities.
2. Confirm leads for tracking metrics and follow-up actions.
3. Agree when the next reflection will take place and add it to the coalition calendar.
4. Close with a celebration activity:
    ○ Share certificates, thank-you notes, or small recognition gifts.
    ○ Take a coalition group photo.
    ○ Invite a round of gratitude (each person thanks someone else).

Output:

- Confirmed next reflection session.
- Assigned metric-tracking leads.
- A sense of celebration and renewed commitment.

Ongoing Practices – Sustaining Your Coalition

📖 *Main Guide References: Section 5.2 – Tracking Coalition Growth and Engagement; Section 5.4 – Ongoing Evaluation as a Learning Practice; Section 4.0 – Challenges & Solutions: Sustaining Momentum*
📒 *Workbook References: Appendix A – Coalition Health Tracking Worksheet; Appendix C – Roles & Responsibilities Matrix*

Purpose: Ongoing Practices are the coalition's maintenance plan — the regular check-ins and tune-ups that keep your work healthy, adaptive, and connected between workshops. These are not one-time activities; instead, weave them into monthly or quarterly meetings, seasonal gatherings, and annual planning cycles.

By integrating Ongoing Practices, your coalition will:

- Track membership, engagement, and leadership health.
- Celebrate wins and address challenges before they grow.
- Sustain energy, resources, and leadership transitions.
- Keep reflection and adaptation part of the coalition's culture.

Facilitator Prep Checklist

☐ Review coalition attendance, sector representation, and engagement notes
☐ Bring copies of the Coalition Health Tracking Worksheet (Appendix A)
☐ Print or project coalition goals and Action Planning tables
☐ Prepare flip chart paper, markers, or whiteboard for group reflections
☐ Optional: Prepare a coalition timeline, member spotlight, or celebration element

Facilitator Tips

- **Keep it light and consistent:** Short, regular check-ins are more effective than rare, heavy reviews.
- **Balance numbers and stories:** Use both data (attendance, sector coverage) and stories (what members are experiencing).
- **Rotate leadership:** Different members can facilitate Ongoing Practices to share ownership.
- **Embed into routine:** Add a 15–20 minute "progress check" into regular meetings rather than waiting for big retreats.
- **Celebrate along the way:** Recognition keeps morale high and helps prevent burnout.

Agenda

Practice	Purpose	Frequency
Coalition Health & Progress Tracking	Monitor coalition membership, engagement, leadership, and progress.	Quarterly or seasonal
Learning Gatherings & Reflection	Reflect on what's working and adapt through experiments/adjustments.	Seasonal/quarterly or after major projects
Sustainability & Succession Planning	Ensure continuity of leadership, funding, and resources.	Annually or before transitions
Embedding Practices into Meetings	Integrate progress checks/reflections into regular coalition meetings.	Ongoing

Activity 1 – Coalition Health & Progress Tracking

📖 *Guide Reference: Section 5.2 – Tracking Coalition Growth and Engagement*
📒 *Workbook Reference: Appendix A – Coalition Health Tracking Worksheet*

When to Use: Quarterly or seasonal check-ins

Purpose: Monitor coalition health by tracking membership, engagement, and progress toward goals.

Facilitation Steps:

1. **Pulse check** (5 min)
   - Ask each member: "What's one highlight since our last check-in?"
2. **Review coalition health** (20–25 min)
   - Use the Coalition Health Tracking Worksheet (Appendix A) to review:
     - Membership & sector representation
     - Attendance patterns

- Leadership distribution
  - Capture discussion about gaps, over-representation, or member needs.
3. **Plan adjustments** (10–15 min)
   - Identify 1–2 actions to strengthen participation or representation.
   - Assign responsibility and follow-up steps.

Output:

- Updated Coalition Health Tracking Worksheet.
- List of agreed action steps to strengthen representation or engagement.

Activity 2 – Learning Gatherings & Reflection

📖 *Guide Reference: Section 5.4 – Ongoing Evaluation as a Learning Practice*
📒 *Workbook Reference: Appendix A – Coalition Health Tracking Worksheet*

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

Purpose: Make space to reflect on what's working, what's not, and what should change.

Facilitation Steps:

1. **Frame the session** (5 min)
   - "This is a learning conversation — not a performance review."
2. **Small-pair reflection** (10 min)
   - In pairs, members share:
     - What's working well?
     - What's not working?
     - What needs changing?
3. **Whole-group share back** (20–25 min)
   - Capture notes on flip chart or in a digital document.
   - Look for patterns and clusters.
4. **Agree on adjustments** (10–15 min)

   - Identify 1–3 experiments or adjustments to try next season.

Output:

- Shared reflection notes.
- 1–3 agreed adjustments or experiments for the next season.

Activity 3 – Sustainability & Succession Planning

📖 *Guide References: Section 4.0 – Challenges & Solutions: Sustaining Momentum; Section 2.4 – Coalition Structures & Roles*
📒 *Workbook Reference: Appendix C – Roles & Responsibilities Matrix*

When to Use: Annually or before leadership transitions

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

Facilitation Steps:

1. **Sustainability check** (10–15 min)
    - Discuss risks (burnout, funding gaps, membership loss).
    - Identify opportunities or strengths to build on.
2. **Leadership succession** (20–25 min)
    - Review current roles using Appendix C – Roles & Responsibilities Matrix.
    - Fill in a Succession Planning Table:

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

3. **Resource & funding planning** (15–20 min)
    - Review current funding and in-kind contributions.
    - Brainstorm new sources and assign follow-up.
4. **Embed sustainability into culture** (10 min)

- Decide on at least one practice (annual celebration, member spotlights, rotating leads).

Output:

- Updated Roles & Responsibilities Matrix.
- Completed Succession Planning Table.
- List of resource/funding 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 Table & meeting agendas*

When to Use: Ongoing — short segments in regular meetings.

Purpose: Integrate reflection and tracking into the coalition's regular rhythm.

Facilitation Steps:

1. Add a "progress check" (5–10 min) into every meeting agenda.

   - Ask: "What's moving forward? What needs attention?"

2. Schedule quarterly or seasonal reviews at the start of each year.

3. Remind members regularly how today's work connects to long-term goals.

Output:

- A coalition meeting rhythm that consistently includes progress checks and reflection.

All activities reference and are recorded in The Gathering Table Coalition Workbook (Final, August 2025). The Workbook is the document of record.