

# A Guide For Effective Networking and Management Skills

## *Workbook*

The Institute for Healthy Communities and  
The Hungarian Association of Healthy Cities

February 3-5, 2004

**“Never doubt that a small group  
of thoughtful, committed citizens  
can change the world. Indeed, it is  
the only thing that ever has.”**

**Margaret Mead**

The HAHC Coordinators Training is provided through a grant opportunity from the American International Health Alliance (AIHA) and the United States Agency for International Development (USAID).



THE INSTITUTE FOR HEALTHY COMMUNITIES

## Agenda

Tuesday, February 3, 2004:

10:00–11:00 am - Registration

11:00–11:15 am - Welcome, introductions, and expectations of the HAHC coordinators

11:15 am–1:15 pm - Pennsylvania Business Leaders Presentations and Dialogues

A) Engaging business in improving health as a corporate value and strategic focus

Pete Butler, Procter & Gamble

Incorporating community contributions into the strategic plan does not imply manipulation or deceit. Social investing disciplines a company's philanthropy so that it focuses on the same general field of interest that the corporation has marked as its own primary business territory. It strategically applies funds paid to nonprofit organizations in a way that helps the corporation continue to be profitable. Communities expect businesses to identify a community issue that has some relevance to the company's mission. Society believes that companies are in business to make a profit, but if they show concern for causes that the consumers relate to, consumers continue to support them through product consumption.

B) Engaging business involvement in improving health as a good business decision and return on investment

John Claypool, Executive Director, AIA Philadelphia (representing the Pennsylvania Chamber of Business and Industry) *The Pennsylvania Chamber of Business and Industry is the state's largest broad-based business association and the fastest growing state chamber in the United States, with more than 10,000 members covering all 67 counties. More information is available on the Chamber's website at [www.pachamber.org](http://www.pachamber.org)*

Social investing starts with the premise that the investor is looking for a return. This is the same as an employer's investment in their employees. High-risk employees, or those employees who engage in health risk behaviors, cost more than low-risk individuals because they are less productive, are absent more often, submit larger health care claims, and spend more time in the hospital. Contributing to the physical and mental well being of employees adds to the level of productivity and therefore, the bottom line for the company.

Tuesday, February 3, 2004: (continued)

Businesses also benefit from the marketing and public relations that is a direct result of community involvement. As a business becomes more involved in community activities, name recognition increases and residents begin to associate the name of the business with the individual from the business they met at a community function. By investing time, expertise, leadership, products, or services, businesses can expect that the community will provide a return on that investment.

C) Engaging business to improve health based on personal commitment and involvement

David E. Davis, President, Kilmorrey Inc., and Chairman of The Institute for Healthy Communities

A general concern for the welfare of society is a common motivator among business leaders for contributing to community health. Business leaders share a genuine concern for the community in which they live and raise their families, the schools to which they send their children, the faith communities in which they participate, and other aspects of the community that serve to improve the health and quality of life for themselves and their neighbors.

D) The business perspective for leading a major health care system

A major shift to running a hospital as a business corporation occurred across the states over the last decade. The role of the president and CEO as a corporate leader underwent dramatic change impacting the physical, as well as internal infrastructure of the organization. The leader's role in articulating the vision and mission of the organization with a business perspective is paramount to the organization's strategic focus and its perception in the community. The successes and failures of a health care organization operating with a business mindset serves as a model of practice for private corporations as they pursue a return on investment.

1:30–2:30 pm

- Lunch

Tuesday, February 3, 2004: (continued)

- 2:45–4:45 pm - Skills Training
- A) Building capacity for effective networking and team development
    - Leadership skills and group dynamics
    - Professional and time management
    - Decision-making and consensus building tools
    - Managing conflict and diverse behaviors
- 4:45–5:00 pm - Coffee break
- 5:00–6:00 pm - HAHC coordinators team work/facilitated questions
- Goals and challenges
  - How to overcome them
- 6:00 pm - Adjournment

Wednesday, February 4, 2004:

- 9:00–9:15 am - Opening remarks and reflections from day 1
- 9:15–9:30 am - Small group reports (four groups will present five minute reports on facilitated questions from prior day)
- 9:30–10:30 am - Building capacity for effective lobbying and advocacy
- Antonio de Blasio, Secretary General, The Hungarian Association of Healthy Cities and World Health Organization
  - Barbara J. Terry, President and CEO, The Institute for Healthy Communities

Interactive dialogue conducted in work groups:

What is your knowledge about the main stakeholders?

Mr. Antonio de Blasio

- Methods of stakeholder analysis
- Surveying interest areas
- Motivation for support
- The importance of marketing and PR techniques—communication skills
- Main partners in “selling the product”—the role of various media

Wednesday, February 4, 2004: (continued)

What are your current practices for lobbying and advocacy within your community?

Mrs. Barbara J. Terry

- What's working?
- What's not working?
- What are the local and regional challenges and obstacles?
- What are the purpose and benefits of effective lobbying and advocacy?

At the local and regional levels, health issues have become a dominant part of the Ministry of Health agenda. Continuing funding is a critical focus during the development of health policy necessary to address the plethora of needs of our most vulnerable citizens.

This session is designed to better prepare HAHC coordinators to deliver the message and have broad impact on health policy procedures. Most politicians are not experts on health issues. They need the information HAHC coordinators have to make informed decisions on pending policies. With so many issues before them, elected politicians cannot seek out constituents' views on every matter. The keys to grassroots advocacy are communications and building relationships – the same skills you rely on every day in running your healthy cities program. The session provides basic guidance on how to effectively use the grassroots advocacy tools of letter writing, phone calls, and face-to-face meetings to influence your politicians.

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|------------------|---|
| 10:30–10:45 am   | - Coffee break  |
| 10:45–11:05 am   | - Small group reports on current practices for lobbying and advocacy        |
| 11:05 am–1:00 pm | - Presentations on techniques for enhancing effective lobbying and advocacy |
| 1:00–2:00 pm     | - Lunch   |

Wednesday, February 4, 2004: (continued)

- 2:15– 3:30 pm - Strategies for business leaders' engagement to enhance sustainability of HAHC women's health initiatives  
Dr. András Márton, Director, Hungarian Cultural Center New York

**Strategies for business leaders' engagement**

The Hungarian Cultural Center, New York is dedicated to promote Hungarian culture and increase awareness of the wonderful cultural resources of Hungary in North America. The operation of the Center is funded by the Hungarian Ministry Cultural Heritage.

Innovative ideas to motivate local businesses to play a more significant role in local health projects through the support of cultural events.

- 3:30-4:00 pm - Closing remarks
- Evening - Dinner and Cultural Event (TBA)

Thursday, February 5, 2004:

- 9:00-9:15 am - Opening remarks and reflections from day 2
- 9:15-10:15 am - Program evaluation and monitoring  
János Girán, Consultant
1. The reasons for efficiency measurements (evaluation) and monitoring in case of local projects
    - Why is evaluation or/and monitoring needed
    - Considering evaluation and monitoring task at the time of project planning
    - Measuring what and why
  2. What should be measured?
    - Tasks during preparation of measurements
    - Measuring techniques (what is good for what and when)
    - Sample and validity
    - Analysis and summary
  3. What could the results of evaluations be used for?
- 10:15-10:30 am - Coffee break

Thursday, February 5, 2004: (continued)

- 10:30-11:30 am - Small group work on program evaluation and monitoring
  - To plan an evaluation process regarding a local project
- 11:30 am – Noon - Small group reports
- 12:00 pm - Wrap-up
- 12:30-1:30 pm - Lunch
- 1:30 pm - Departure

# **HAHC Coordinators Training**

**Budapest, Hungary**  
**Tuesday and Wednesday**  
**February 3-4, 2004**

## **HAHC Coordinators Training Overview:**

Healthy City and Healthy Community groups and organizations are learning that the work to improve health and quality of life cannot be done alone. Given the economic challenges and diminishing resources, improving skills to network and collaborate more effectively builds the case for strong partnerships and engaging diverse stakeholders. Effective networking and collaboration beyond the traditional boundaries and across diverse organizations better aligns resources, validates health priorities, reduces competition and duplication, and increases individual's access to critical health services. Effective networking and collaboration among HAHC coordinators and their stakeholders can positively affect the enhancement of local health policy and provide opportunity for countrywide replication.

The effectiveness of a team's interaction skills in the areas of group dynamics and conflict management determines its cohesion and sustainability. The more intense the level of networking and collaboration of a group, the more effective they are in achieving measurable outcomes. The HAHC coordinators will be trained on how to coach and guide the group process, strengthen interaction and trust among diverse stakeholders and to manage conflicting interests and behaviors. The training will promote several consensus building tools and techniques for prioritization and selection of the projects and programs that have the greatest feasibility for impacting women's health. Skills on managing time and improving personal productivity will also be discussed.

Organizations and groups that learn how to work together achieve high levels of trust, sustained commitment from the stakeholders, and accomplish their mission and purpose.

## **Purpose:**

To build capacity and optimize organizational effectiveness of HAHC coordinators to improve health with an emphasis on women's health.

## **Objectives:**

- ❖ Create a forum for dialogue between United States business leaders and HAHC coordinators on engaging the business community
- ❖ Enhance skills and professional development of HAHC coordinators in the areas of conflict management, time management, and consensus building among diverse stakeholders
- ❖ Build capacity of HAHC coordinators to effectively network and collaborate
- ❖ Assist participants to develop business plans and fund development initiatives
- ❖ Improve coordinators capacity for effective lobbying and advocacy at the local and regional levels









# Skills Training

### Achieving Organizational Change

If restraining forces are stronger than driving forces—change will not happen. One of the strongest driving forces is ownership.

- ➔ Unity of Purpose
- ➔ Teamwork
- ➔ The “Learning” Organization

An organization that is continually enhancing its ability to achieve the desired future

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Change is a constant that continually impacts the latitudes and behaviors of people and organizations. To understand the dynamics of change, leaders must adopt a holistic and systems perspective and approach.

How organizations and people learn is a key determinant to their success. The organization or network must be appropriately aligned and driven by its vision and mission to meet desired goals and objectives. Organizations must continually explore ways to create and design their own future and to effect positive community change.

### **Leadership: Lessons From the Magic Kingdom**

The secret to sustaining involvement and passion in an organization is the commitment and enthusiasm of its leaders:

- Leaders view their employees as centers of creative solutions, not just as members of a team who execute management's dictates
- Leaders motivate people, develop their talents, and provide proper resources and rewards to them to succeed

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### **Leadership: Lessons From the Magic Kingdom (continued)**

- Leaders view all levels of employees as capable of taking a leadership role in coming up with and implementing creative ideas and solutions
- Leadership generates a vital, creative culture
- Leaders feel about their team and how that is translated into levels of service and effectiveness

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The American recreational giant Disney is worldwide renown for its approach to customer service. What is the secret to their success? The answer to success at the “Magic Kingdom” is not magic, but leadership. There are several significant features related to leadership at Disney that we can apply to encourage creative, effective networking and sustainability of Healthy City programs and initiatives. Leadership lessons from the Magic Kingdom are models of practice and sound leadership disciplines to enhance organizational development and success.

**Leadership: Lessons From the Magic Kingdom**

(continued)

- Leaders encourage ownership by everyone within their individual spheres of influence
- Leaders encourage employees to spend much of their time interacting as partners
- Leaders reinforce the significance of a relationship between high level of leadership involvement and pride among group and stakeholders
- Leaders “walk the front”

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**“If you don’t feel out of control, you’re not going fast enough”**

**Mario Andretti**

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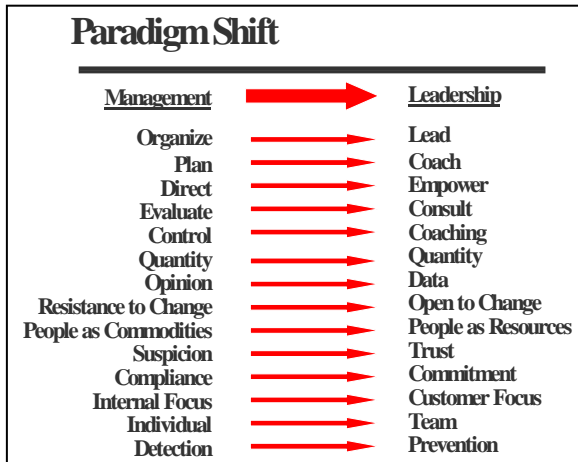
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Managers at Disney model a leadership style that encourages and recognizes team and individual involvement. Every cast member is an active part in the company’s success. The focus of leadership is guest satisfaction, customer loyalty, and performance excellence. These three factors are also essential to leading a healthy city program and cultivating committed partners and stakeholders. True leaders will spend time in perfecting their leadership style by “walking the front”—observing and evaluating the organization with the perspective of the person or client being served.



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### Critical Differences Between

High Performing Teams:	Traditional Work Groups:
<ul style="list-style-type: none"> <li>• Compete outwardly</li> <li>• Goal focused</li> <li>• Effective</li> <li>• Team agenda</li> <li>• Participate</li> <li>• Self-starters</li> <li>• Direct linkages</li> <li>• Interdependent</li> <li>• Enjoys each other</li> <li>• Creates sense of urgency</li> <li>• Thrives on challenge</li> </ul>	<ul style="list-style-type: none"> <li>• Compete internally</li> <li>• Task focused</li> <li>• Efficient</li> <li>• Personal (indiv.) agenda</li> <li>• Autocratic</li> <li>• Kick-starters</li> <li>• No linkages</li> <li>• Independent/over-dependent</li> <li>• Tolerates each other</li> <li>• No urgency</li> <li>• Avoids risk</li> </ul>

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A significant paradigm shift has occurred over the last decade from managing people and organizations to leading them. There is a saying that “you manage tasks, but you lead people.” That perspective fosters the need to develop skills that enhance team development, consensus building, and conflict and time management in a dynamic interplay. That perspective further fosters the need for leaders to create a culture where people can learn, grow, and achieve success together. The shifting paradigm for leaders to build skills for enabling the team to move from being a traditional work group to a high performing team that effects change and health status.

## Goals of Networks/Teams

- Open exchange of ideas, information
- Focus the organization
- Achieve breakthrough improvements
- Cross-functional efforts
- Create the environment for process improvement
- Improve quality
- Improve productivity

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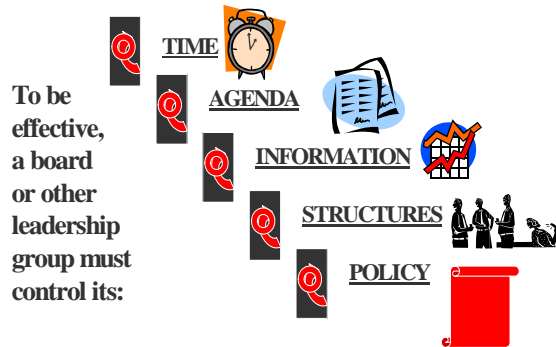
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## The Levers of Effective System Leadership



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The goals of a team should be to collaborate, not to compete...to be responsible and driven by a vision and mission to improve the health status of our cities. The pendulum often swings back and forth between competing and collaborating among networks and groups. Effective networks and teams must be agents of change, able to focus the organization or team on the task, while ensuring ownership of the process and programs. Teams must be accountable for measurable results as they balance the levers of time, agenda, structures, information and policies. The leader is responsible to ensure that balance while meeting the needs of each of its team members and stakeholders.

## Team Needs

Teams have additional needs that affect the success of the team process. Successful teams are aware of these needs and strive to use the appropriate communication processes to fulfill them.

- Openness/ involvement
- Respect for differences
- Maintenance of self-esteem
- Mutual trust
- Decision-making power
- Conflict resolution
- Completion of tasks and goals

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## Team Roles

### Team Leader Responsibilities:

- Acts as liaison between team and management
- Participates as an equal member
- Shares leadership responsibilities
- Helps facilitator guide the process
- Demonstrates openness
- Role-models interpersonal skills
- Displays energy and enthusiasm

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Teams have the common characteristics of meeting with a common purpose, feel a sense of belonging, exert influence upon one another and, prefer to communicate on a face-to-face basis. Teams come together to create ideas, promote solutions or to implement actions that will improve a problem or situation. Although teams come together with a belief that more can be done together than alone, team members also have personal interests and needs. In general, teams are formed when:

- A complex problem or issue exists
- To improve or prevent illness
- Additional information or input is needed

Teams have additional needs that affect the success of the team process. Successful teams are aware of these needs and strive to use the appropriate communication processes to fulfill them.

### Elements of Trust

Team and network leaders must create an environment of trust, making certain that network members:

- Clearly understand the mission of the organization or institution
- “Trying to do the right thing” --- an advocate for the individual or the community
- Using resources to fulfill the mission of the organization

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### Leading the Group or Team

**Directive Behaviors:**

- Provide training in decision-making, conflict resolution, communication skills, or managing differences in culture, perspective, etc.
- Provide technical training
- Clarify and articulate the group’s mission and purpose with the team
- (Re) define goals and roles
- Communicate policies and procedures
- (Re) clarify action steps
- Provide opportunities to practice new behaviors
- Provide feedback on results

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Building trust and creating a forum that is open to candid feedback and interaction is an essential skill of an effective leader. The leader’s role in building trust can be more important than achieving results from their efforts.

The effectiveness of a team’s interaction skills will determine its level of cohesiveness. Trust and cohesion occur over time as the team shares facts and information in its initial meeting. As the team grows, ideas are shared, and finally, individuals’ feelings and values are shared. When these stages are managed properly through team interaction skills, an open environment based on trust will evolve.

The leader makes a conscious effort in directing and influencing the behavior of the team necessary to build trust and achieve team goals and objectives.

## Leading the Group or Team (continued)

### Supportive Behaviors:

- Involve members in shaping and understanding the group's purpose and mission
- Practice active listening
- Encourage involvement in leadership, problem-solving, and decision-making
- Catch people doing something right
- Provide reassurance and support for task improvement
- Encourage the expression of difference in opinion and perspective
- Model confronting, challenging, and dealing with conflict
- Build supportive relationships

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## Leading An Empowered Network

### Four Essential A's:



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A team is only as powerful as the people on it. If members are not carefully selected so the needed skills, expertise and areas of responsibility are present, the team will not stand much chance of effectively dealing with a situation.

Team members cannot be expected to participate fully in developing solutions for improving the city's health if they lack the knowledge required for their input to be valuable and relevant.

The team leader develops skill to create an environment that encourages participation, ensures that every voice is heard, minimizes conflict and supports sound decisions.

The four essential "A's" serve as a basis for the leader to empower the team or network.

**Formalization of Key Processes**

- ▶ Identify Top Priority Jobs
- ▶ Identify Customers and “Actors”
- ▶ Flowchart Existing Process
- ▶ Create Process and Quality Indicators for Tracking
- ▶ Analyze Existing Process
- ▶ Make Improvements
- ▶ Standardize Process
- ▶ Replicate Where Possible

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**Meeting Methods**

- Agenda
- Procedures
- Clearly stated objectives
- Action assignments
- Quiet time
- Meeting minutes
- Evaluation

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The leader must manage their personal time as well as the time invested by team members. The effective leader ensures that there is a balance among content, process and individual input.

Taking steps to formalize key processes are necessary in order for the leader and the teams to avoid frustration and mismanagement of time.

There are seven essential meeting mechanics for organizing time and properly managing projects that also serve as a guideline for managing team members input, feedback and evaluation.

Good meeting methods reduce the likelihood of conflict and encourage participation and interaction. The meeting methods also prevent team members from deserting the team and aid in sustaining a stable work group for achieving the goals of the initiative or program.

## **Team Meeting Evaluation Time Management**

1. What was the objective of the meeting?  
 Information sharing       Brainstorming  
 Decision-making       Other
2. Were all team members prepared?  
 yes       no
3. Did all members contribute?  
 yes       no
4. Were all members recognized for their ideas?  
 yes       no
5. Did anyone try to jump to a solution?  
 yes       no
6. Was any conflict observed between members?  
 yes       no  
If so, which techniques were used or could have been used to diffuse the situation?
7. Did the team reach consensus?  
 yes       no
8. Were actions assigned?  
 yes       no
9. Were meeting objectives successfully completed?  
 yes       no
10. Were agenda items identified for the next meeting?  
 yes       no
11. What can be done to improve the teamwork environment?



## Multiple Roles of Network Members

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| <ul style="list-style-type: none"> <li>• <b>Initiator</b> <ul style="list-style-type: none"> <li>– Contributes new ideas</li> <li>– Encourages new direction</li> </ul> </li> <li>• <b>Facilitator</b> <ul style="list-style-type: none"> <li>– Stimulates discussion</li> </ul> </li> <li>• <b>Clarifier</b> <ul style="list-style-type: none"> <li>– Helps others understand</li> </ul> </li> <li>• <b>Summarizer</b> <ul style="list-style-type: none"> <li>– Pulls it together</li> </ul> </li> <li>• <b>Information Seeker</b> <ul style="list-style-type: none"> <li>– Asks for input, direction</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Coordinator</b> <ul style="list-style-type: none"> <li>– Keeps team on track</li> </ul> </li> <li>• <b>Recorder</b> <ul style="list-style-type: none"> <li>– Keeps records, minutes</li> </ul> </li> <li>• <b>Evaluator</b> <ul style="list-style-type: none"> <li>– Puts value to discussion</li> </ul> </li> <li>• <b>Coach</b> <ul style="list-style-type: none"> <li>– Gives direction to complete task</li> </ul> </li> <li>• <b>Decision Tester</b> <ul style="list-style-type: none"> <li>– Seeks consensus</li> </ul> </li> </ul> |
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## Conflict Roles

- **Blockers**
  - Insists on their position
  - Rejects consensus
- **Dominators**
  - Monopolizes
  - Attempts to exert authority
  - Manipulates the team
  - Dominates conversation
- **Avoiders**
  - withdraws

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The research of K.D. Benne and P. Sheats in small group dynamics has offered a classification of roles based upon verbal behavior. The roles fall under the three dimensions of the team process. The first two categories focus on the two areas that are essential for group effectiveness—task roles and maintenance roles. Task roles are action-oriented and help the group accomplish its objectives. Maintenance roles address interpersonal skills and help the group function smoothly and become cohesive. The third area identifies verbal patterns of behavior that individuals might display that hinder the group’s progress.

## Strategies for Managing Conflict

- Establish a statement of purpose
- Follow stated procedures
- Clarify the other person's position
- Acknowledge their position and/or confirm understanding
- State your position
- Recognize all contributions
- Strive together for a workable solution
- Look for a win-win situation
- Seek areas of agreement

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## Conflict Management Tips

1. Deal with conflicts as soon as they appear.
2. Use descriptive or factual statements.
3. Disclose your reactions without attacking.
4. Treat others as equals: "adult to adult."
5. Show empathy for others' feelings.
6. Use group pressure tactically.
7. Avoid using a "know-it-all" attitude.
8. Model the behaviors you want from others.

Delorese Ambrose & Associates

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When there are hard decisions to be made, it is not always easy to reach a consensus. Frequently, conflict occurs.

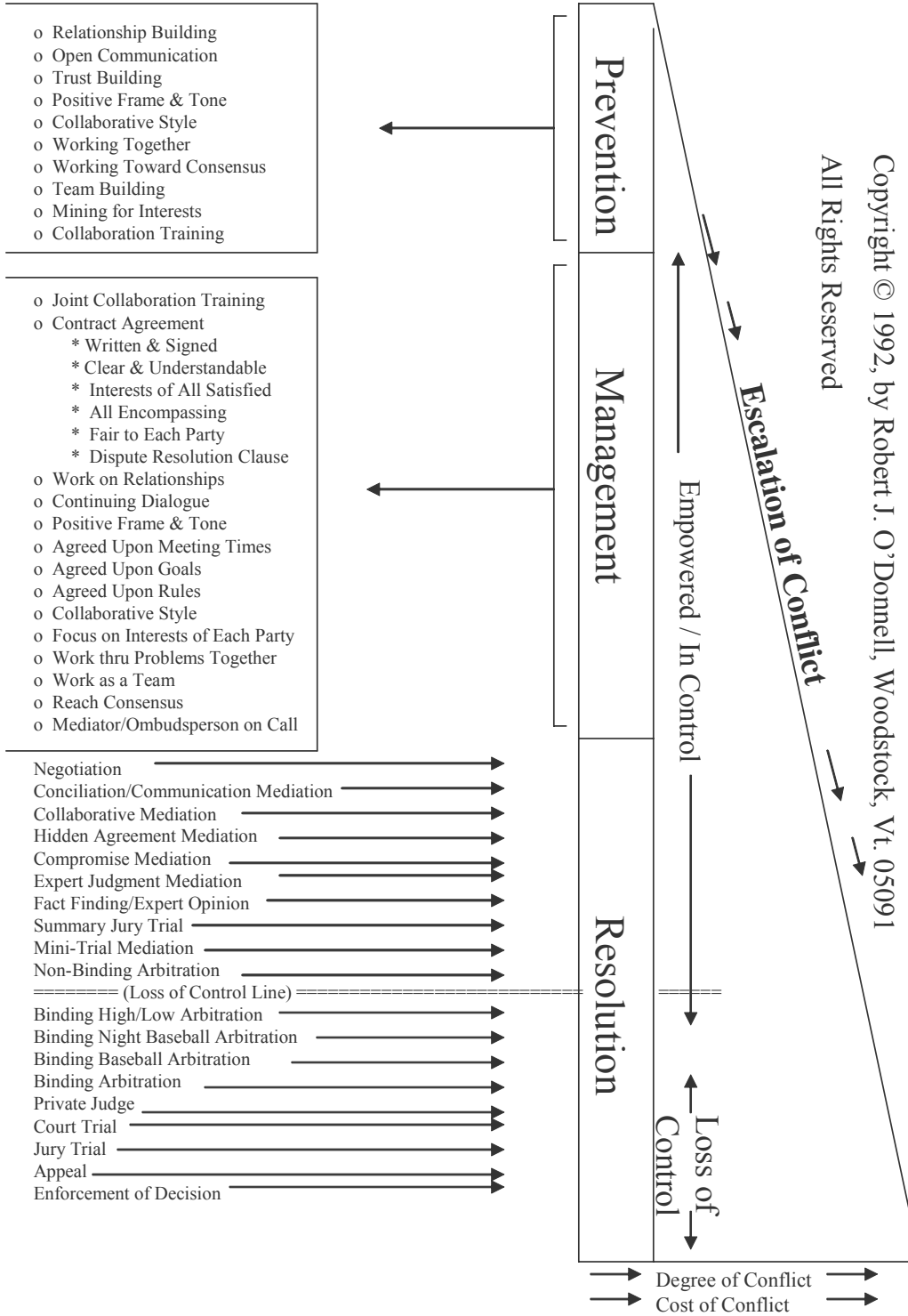
Conflict happens when two or more members of a team seem to be striving for incompatible goals. Until members agree on a common goal, a consensus will not be reached.

There are several techniques that can help resolve conflict. Conflict is not always negative, but when managed properly, can be utilized to move the team forward. However, if conflict is not managed by the leader, conflict can lead to permanent damage, disbandment of the team, or personal injury.

# CONFLICT CONTINUUM

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## Handling Hostility and Conflict

- Stay calm
- Listen for person's true meaning
- Remember other person's frame of reference
- What are the barriers?
- Approach from different viewpoint
- Utilize outside discussions
- Avoid negative words
- Avoid put downs
- Look for areas of agreement
- Answer point, summarize and move on
- Don't be pulled into an argument
- Use class participation

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No human being has the right to make a unilateral decision that affects the lives of other individuals without offering them a voice in that decision.

Unknown Author

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As the leader manages conflict among team or network members, the leader must manage their own personal behavior and attitude. The team leader must avoid being pulled into an argument but must maintain a level of confidence, an unbiased mindset and a willingness to resolve the conflict.

The network or team leader should take steps to prevent conflict through sound management skills, supportive behaviors and creating an open environment where each member can be heard and appreciated.

**Consensus Building**  
 • Do not expect unanimous agreement  
 Evaluate and summarize

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**Consensus Decision Making**

- The unilateral decision
- Minority rule
- Majority rule
- Consensus
- Unanimous consent

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A consensus is a general agreement by team members to support a decision on a specific issue. There are three rules to follow when trying to build consensus among a group or network.

When able, avoid voting as a method for decision making among diverse network members. Voting creates winners and losers, victors and casualties. Consensus building is seeking more than a decision but striving to build commitment, ownership, and the accomplishment of tasks.

Although voting is part of a governmental approach in making decisions, voting within a group or network can provide negative consequences. Voting minimizes the implementation of a vital program and may split the group into a “we—they” mindset. Voting can also alienate members of the team who may not understand or agree with a decision. Although consensus takes time, the leader can ask certain questions to help guide the group towards a decision.

**Consensus-Building Questions**

- **What information do you need to support this decision?**
- **What have we neglected to consider?**
- **How can we build on this idea so we can reach a decision you can support?**

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**Building Consensus Methods**

**Two popular methods for building consensus are multi-voting and brainstorming**

<b><u>Multi-voting</u></b>	<b><u>Brainstorming</u></b>
<ul style="list-style-type: none"> <li>• Straw poll</li> <li>• Select most popular items</li> <li>• Limit discussions</li> </ul>	<ul style="list-style-type: none"> <li>• Set allotted time</li> <li>• Record all ideas</li> <li>• Three words minimum</li> <li>• Build on each others ideas</li> <li>• Everyone participates</li> </ul>

**Notes:** \_\_\_\_\_

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There are several tools and techniques that can be used to build consensus, ensure ownership and fulfill the goals established by the team or network. Multi-voting and brainstorming are very common but easily utilized methods for building consensus.

The process of brainstorming is designed to marshal group energy in a “stream of conscious creativity.” Although we are all creative to varying degrees, we all seem to have a tendency, at times, to stifle our own creativity when working alone and to stifle others’ creativity when working in groups.

Human creativity operates on a continuum, just like any other human capacity. On one side of the polarity is the “creative genius” who comes up with wildly imaginative ideas. On the other side of the polarity is the “logical censor,” whose job it is to make sure that everything is safe and works just right.

The process of brainstorming allows the creative side to work unleashed, so that more imaginative and nontraditional approaches to problems and changes have a chance to surface.

### **Evaluating Strategic Initiatives**

**When evaluating a decision, the following questions are helpful:**

- **Is it practical?**
- **Is it achievable?**
- **Does the initiative strive for behavior and/or systems change?**

**Notes:** \_\_\_\_\_

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### **Techniques for Prioritizing Issues or Projects**

- **Rank problems in order**
- **Obtain agreement**
- **Pareto analysis**
- **Nine-block worksheet and grid**
- **Decision matrix**

**Notes:** \_\_\_\_\_

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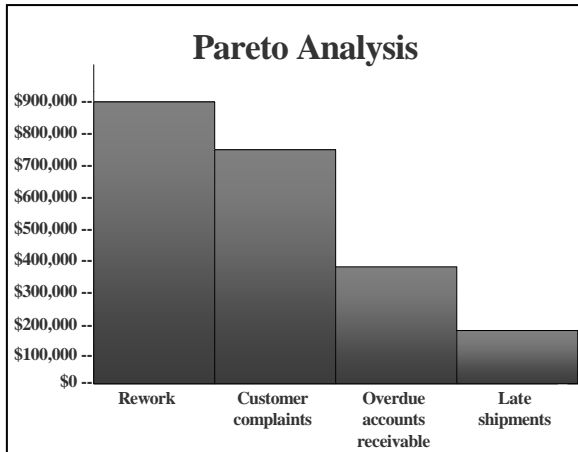
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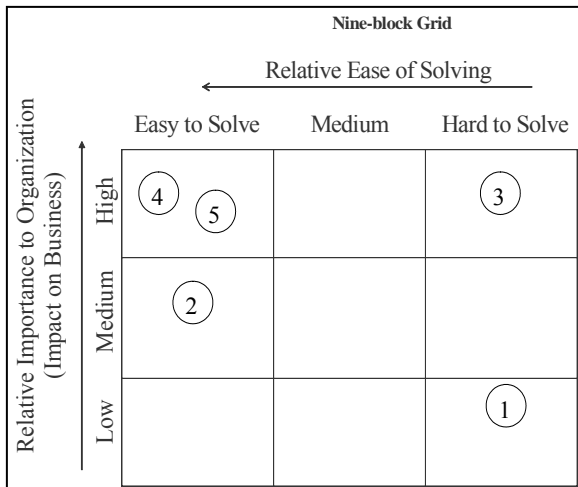
Although not having enough reasonable choices is frequently seen as the main block to effective decision making and problem solving, having too many options is almost as bad. When energy and creativity are high, the group may generate so many options that it either doesn't know how to deal with them or it bogs them down in trying to identify the ones that are worthy of consideration.

Prioritizing the options leads the group to making good judgments and sound decisions.

A team is only as powerful as the people on it. If members are not carefully selected so the needed skills, expertise and areas of responsibility are present, the team will not stand much chance of effectively dealing with a situation.



**Notes:** \_\_\_\_\_  
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**Notes:** \_\_\_\_\_  
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Three techniques that can be used to prioritize problems are Pareto analysis, the nine-block worksheet and grid, and the decision matrix.

Pareto analysis is a tool that can be effective at different stages of problem solving. In the first state, prioritizing problems, Pareto analysis takes a graphic look at several problems, ranking them in order of significance in terms of a single consideration, such as cost or customer impact.

The nine-block worksheet and grid are used together for establishing problem-solving priorities. After a problem list is developed, problems are rated according to how easy each problem might be to solve, and how important solving it is to the organization. These ratings are then plotted on a grid, which provides a visual display of priorities.

## Nine-Block Grid Worksheet

**Relative Importance  
to Organization \***

**Problem List**

**Relative Ease  
of Solving \*\***

_____	1. _____	_____
_____	2. _____	_____
_____	3. _____	_____
_____	4. _____	_____
_____	5. _____	_____
_____	6. _____	_____
_____	7. _____	_____
_____	8. _____	_____
_____	9. _____	_____
_____	10. _____	_____
_____	11. _____	_____
_____	12. _____	_____
_____	13. _____	_____
_____	14. _____	_____
_____	15. _____	_____
_____	16. _____	_____
_____	17. _____	_____
_____	18. _____	_____

\* Rate each problem high, medium or low

\*\* Rate each problem easy to solve, medium or hard to solve

**Identify Key Considerations**

- **Business objectives**
- **Impact on customers**
- **Impact on those who operate the process**
- **Available data**
- **Availability of human resources**
- **Price of nonconformance**
- **Financial resources**
- **Relative ease of solving the problem**

**Notes:** \_\_\_\_\_

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**Elements to Consider**

Other elements that must be considered when selecting and prioritizing issues and programs are:

- **Hospitals are run like a business—the corporatism of health care**
- **Local government is directed by policy of network, members, and community leaders**
- **What others?**
- **Perceptions and attitudes**
- **Expectations of both consumers and health care employees about the health care system**
- **Perceived decline in the quality and access to care**

**Notes:** \_\_\_\_\_

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### Decision Matrix

Options	Key Considerations														Totals
	Time		Cost		Complexity		Mistake proofing		East to implement		Low cost		Customer impact		
	Factor: 8	Factor: 3	Factor: 7	Factor: 9	Factor: 8	Factor: 3	Factor: 10								
Option A	6	(48)	5	(15)	4	(28)	9	(81)	6	(48)	5	(15)	4	(40)	275
Option B	3	(24)	1	(3)	8	(56)	6	(54)	3	(24)	1	(3)	8	(80)	244
Option C	1	(8)	6	(18)	5	(35)	3	(27)	1	(8)	6	(18)	5	(50)	164
Option D	5	(40)	4	(12)	2	(14)	4	(36)	5	(40)	4	(12)	2	(20)	174

The decision matrix can be used when a complex decision needs to be made. It provides a method for deciding on one option, or selecting a few options, when a number of alternatives exists.

## Priority Worksheet

	Importance	Resources Needed	Authority	Complexity	Time To Implement	Results	Other	Total
Problems Or Oppor- tunities	5- Important, Pressure	5-Modest	5-Leader	5-Not Complex	5-Month or Less	5- Measur- able	5-	Sum the Ratings
	4-	4-	4-	4-	4-	4-	4-	
	3-Some Concern	3- Consider- able	3-Two Levels	3-Two Levels	3-Three Months	3-Some Indicators	3-	
	2-	2-	2-	2-	2-	2-	2-	
	1-Little Concern	1-Large Amount	1-Several Levels	1-Complex	1-Six Months or More	1- Intangible	1-	

## Summary

- List all problems
- Identify key considerations
- Prioritize problems
- Communicate priorities

Notes: \_\_\_\_\_

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## Communicate Priorities

Once a decision has been made on selecting a program or issue to address, that decision must be communicated to the:

- Entire network
- Community
- Local government
- Individuals and organizations involved

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Once problems have been selected, priorities should be communicated to those who need to be involved in, or aware of, efforts to solve the problems.

People who need to understand how problems have been prioritized might include:

- Management, so goals can be set and resources provided
- Any teams or individuals who will be involved in, or affected by, efforts to solve the problem

It is also important to communicate with anyone who submitted a problem that was not selected and explain the reason why it was not selected.

Everyone needs to understand what to expect. Clear communication makes it possible to coordinate improvement efforts throughout the organization.

## The 7-Step Meeting Process

### What:

A meeting is a process that produces results. In order to improve the results of a meeting, one must begin by defining and improving the meeting process.

### The Seven Steps

The first three steps help the team prepare to do its work; they take about 5 minutes. The fourth step is the content of the meeting; the time devoted to this step will vary depending on the nature of the meeting agenda. The last three steps help the team close the meeting and plan future work; they take about 15 minutes.

#### 1. Clarify The Objective

The team begins the meeting by ensuring that everyone understands and agrees on what is to be accomplished in the meeting. Objectives include both the content objective of the meeting and the specific meeting process objectives, such as improving participation and listening.

#### 2. Review Roles

The team confirms who will be taking on specific roles for the meeting: team members, leader recorder, timekeeper, and facilitator.

#### 3. Review The Agenda

Each agenda item includes the methods (e.g., brain-storming, cause and effect diagram) to be used for that item as well as the amount of time to be devoted to each item.

#### 4. Work Through The Agenda Items

There may be one or several agenda items for a particular meeting. The team works through them using the methods and the time frame decided upon in step 3.

#### 5. Review The Meeting Record

Team members review information recorded on flipcharts during the meeting to refresh their memories about what has occurred and what has been decided. In this step the team also checks for corrections or additions to the meeting record, and decides what information needs to be kept in the team's permanent record.

#### 6. Plan Next Steps And Next Meeting Agenda

The team takes the opportunity to think about and agree on the work that needs to be done next in order to advance the project. The team plans the next meeting. In this way, the team clearly lays out the work that lies ahead, and ensures that all members will have the opportunity to prepare for the next meeting.

#### 7. Evaluate The Meeting

Team members generate two lists, in answer to the questions:

- What went well that we should continue doing?
- How could we improve the next meeting?

In this way, members learn about the meeting process so that they can continuously improve it.

### Meeting Steps

#### Pre-Flight



1. Clarify the objective
2. Review Roles
3. Review the agenda

#### Flight



4. Work through agenda items

#### Landing

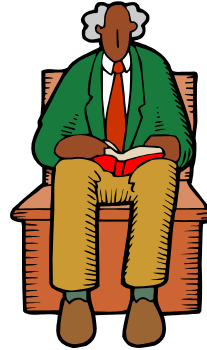


5. Review the meeting record
6. Plan next agenda
7. Evaluate

# The Change Continuum

## NO CHANGE

Traditional  
Past  
Change is Bad  
Values What Was  
Older  
Blindly Resists Change  
Stagnation



## PRODUCTIVE CHANGE

Now  
Change is Inevitable  
Values What Is  
Wide Age Range  
Honors Resistance  
Growth & Effectiveness

## CONSTANT CHANGE

Dynamic  
Future  
Change is Good  
Values What Might Be  
Younger  
Suppresses Resistance  
Chaos



### **Validating a Decision or Priority**

For validating a decision or priority, it is helpful to take the following suggested steps:

- Provide public and employee education about changes occurring in the delivery of health programs
- Deal with unrealistic consumer expectations
- Involve consumers and employees in the prioritization process

**Notes:** \_\_\_\_\_  
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## **Eight Assumptions of Productive Change**

1. Change is best facilitated by developing ownership in the change process
2. Change will occur most easily in an atmosphere of enlightened self-interest
3. People do not resist change; they resist pain or the threat of it
4. People actually tend to resist the opposite of change, which is boredom
5. Power is the ability to get what you want; resistance is the ability to avoid what you don't want. Resistance is subset of power, not of change
6. Resistance is best dealt with by honoring it rather than suppressing, avoiding or minimizing it
7. People can work best with others' resistance by first understanding and accepting their own resistance
8. Change leadership involves helping people to make better choices in light of the current realities and then assisting them in taking full responsibility for pursuing these choices

## **Ten Suggestions for Working with Groups**

1. Parkinson's First Law: Work expands to fill the time available
2. Work groups tend to function best with six members and usually should not exceed nine members
3. Group members should work on the change interactively as much as possible
4. Seating should be arranged in a circle
5. Synergy is to a group what energy is to an individual
6. Syntality is to a group what personality is to an individual
7. The medium is the message
8. There is a direct relationship between the amount of involvement in the change process and the commitment to the outcome
9. The "gadfly option"
10. Don't hold the chalk

# **Bibliography**

## **on**

# **Management Skills**

## **and Teamwork**

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# **Influencing Health Policy at the Grassroots Level**

# “WHY SHOULD I GET INVOLVED IN GRASSROOTS ADVOCACY?”

**Grassroots Advocacy: Attempting to influence the actions of elected officials through communications from the electorate.**

**You are a busy coordinator consumed by the day-to-day demands of running an efficient healthy cities initiative and providing quality service to your community in times of turbulent change. Why should you expend your valuable time and energy trying to influence policy in your city and county?**

**Because you can't afford NOT to be involved!**

At the local and regional levels, health issues have become a dominant part of the Ministry of Health agenda. Continuing funding is a critical focus during the development of health policy necessary to address the plethora of needs of our most vulnerable citizens.

This session is designed to better prepare you to deliver the message and have broad impact on health policy procedures.

Most politicians are not experts on health issues. They need the information you have to make informed decisions on pending policies. With so many issues before them, your elected politicians cannot seek out constituents' views on every matter. It is your responsibility to express your views and concerns to ensure that they do not operate in a vacuum. **Your involvement, as a constituent and community leader, is essential to make politicians care enough about the issue to listen to the arguments, pro or con, and take a position.**

The keys to grassroots advocacy are communications and building relationships – the same skills you rely on every day in running your healthy cities program. The session provides basic guidance on how to effectively use the grassroots advocacy tools of letter writing, phone calls, and face-to-face meetings to influence your politicians.

*getting started*

## **“WRITING A LETTER / SENDING A FAX / EMAIL**

The time-tested method of sending a written communication to your politician remains one of the most effective ways to deliver your message. What’s new, however, is that you may now deliver the message by mail, by fax, or by sending an email.

However it’s received, letters and other forms of written personal communications remain probably your most effective communication tool – short of personal visits. Letters from constituents that are well written, and briefly explain the issue and the program’s impact, will be noticed by the politician.

### **Addressing your letter to a politician or council person**

Antonio

# **SAMPLE LETTER**

Dear \_\_\_\_\_:

## **Opening Paragraph:**

- ❑ State the subject of your letter
- ❑ Use the bill number or name, if available
- ❑ Identify yourself and your organization

Example: “I am the coordinator of \_\_\_\_\_, a healthy city initiative based in \_\_\_\_\_.

## **Body of Letter:**

- ❑ Explain the issue or program simply and factually at a level the politician or representative will understand.
- ❑ Give a local example of the impact of the issue to make the politician care.
- ❑ State your position on the issue or program, whether you support it or oppose it.
- ❑ Be polite. Don't threaten. There's always another issue to fight another day.
- ❑ Thank the politician for their attention to the issue.
- ❑ Let the politician know you are a resource for more information.
- ❑ Ask for a reply.

## TIPS FOR EFFECTIVE LETTER WRITING

- √ Write to the politician who represents your city, and to the local officials who represent the area where you live.
- √ Limit the length of your letter to no more than two pages, one if possible.
- √ A single, well-written letter from a well-known constituent may be more likely to influence a politician's decision than an avalanche of post cards. Modify the letter to deliver your own unique message.
- √ Fax your letter to your representative if the timeframe for action is short
- √ Give your credentials when appropriate.
- √ Avoid personal criticism.
- √ Express appreciation for past or future support.
- √ Ask the politician to send you a letter stating his/her position on the issue.
- √ Send a copy of your letter to the HAHC Secretary General when necessary to coordinate lobbying activities with a grassroots effort.

## **MAKING PHONE CALLS TO POLITICIANS**

When time is short, a personal phone call to local politicians or key health ministers may be the most effective method to communicate your views. As with all grassroots advocacy, your call is most likely to receive attention if you have developed a personal relationship with the politician. Often, calls are “logged” as for or against a particular issue. Sometimes, you may not get past the receptionist. Nonetheless, making a well-timed call can be particularly important. And, especially when combined with calls from your colleagues on the same issue, the call may tip the balance in your favor. So, don’t hesitate to call.

### **For Whom Should You Ask?**

- ❑ Ask for the politician if you know them personally.
- ❑ If you don’t know the politician, ask to speak with the assistant who handles the issue. For most issues, that probably will be an assistant who handles health issues.
- ❑ If you can’t reach an assistant, leave a concise message. Some political offices may count the number of calls they receive on an issue – pro and con – and relay that information to the politician or representative.

## TIPS FOR MAKING EFFECTIVE PHONE CALLS

- √ Focus on a single issue, making two or three key points in your phone call.
- √ Have talking points – or your own notes – in front of you when you call to stay focused on the message you want to deliver.
- √ Localize the issue to demonstrate the impact on the politician’s own constituents.
- √ Clearly state the action you wish the politician or representative to take on the issue (vote for, vote against, offer an amendment, delete a provision, etc.).
- √ Keep your call brief – not more than three or four minutes.
- √ Don’t pretend you know the answer to a question if you don’t. Tell them you’ll get the answer and get back to them.
- √ Leave your name and telephone number with the staff to whom you’ve spoken in case they have any questions later.
- √ Jot down the name of the assistant you spoke to and put it in your phone book. Next time, you can ask for him or her by name and begin building a relationship. Staffers are more likely to listen to and return phone calls from people they know.
- √ Send a thank you note!

# MEETING WITH YOUR POLITICIANS

Face-to-face meetings are the most effective method of communicating with politicians, representatives, and their staffs. In order to be most successful, they also require extensive planning, an understanding of the needs of politicians, and, perhaps, rehearsal.

Politicians may be interested in visiting your office. And staff is often searching for opportunities to use the politician's time at home most effectively. Therefore, a visit to your office will often serve everyone's interests.

It is best to meet with politicians when they are home in their local offices during recess, when they have fewer distractions from political business.

## **Requesting A Meeting:**

- ❑ Contact the politician or politician's office and ask to speak with the appointment secretary/scheduler.
- ❑ Explain who you represent and the reason you want a meeting with the politician. Ask the scheduler how you can arrange a meeting. You may be referred to the local office if you are requesting a meeting in the city.
- ❑ If you are inviting the politician to visit your site, send a letter of invitation.
- ❑ Ask the scheduler the amount of lead-time needed to schedule a visit and send your invitation far enough in advance.

# TIPS FOR A SUCCESSFUL POLITICAL VISIT

During your visit, keep the message focused and straightforward. It also may be beneficial to repeat the message throughout the meeting. The mark of a successful political visit is leaving the politician with a good sense of why you were there. Some tips to keep in mind while preparing for your visit are:

## √ **Prepare**

- Treat this as the important meeting it is by preparing in advance.
- Always leave behind materials that support your position.
- Politicians like data that demonstrates how a certain policy will affect your city and community.

## √ **Practice Political Etiquette**

- Be positive and firm, but not confrontational. Politicians generally want to help.
- Establish yourself as a resource.
- Politicians deal with many issues, so don't expect them to have a familiarity with details.
- Be on time and let the receptionist know you're there.
- In a team visit, work with your colleagues, allowing all to participate in the meeting.

## √ **Keep it Brief**

- Don't try to convince the politician that you know everything about improving health in just one meeting. This visit is just one step in your overall effort to build a long-term relationship with your politician.
- If you are requesting action, communicate that up front.
- Support your request with rationales and examples from your experience, community.
- Sum up the meeting and answer any questions.
- Because politicians' time is limited, have a plan and budget your time.

## √ **Tell The Truth**

- Credibility is critical to a successful relationship.
- Limit blaming others for the current state of affairs.
- If asked a question about the other side of your argument, answer the question as completely as you can, giving your particular perspective.

## √ **Never Promise More Than You Can Deliver**

- If you say you're going to do something, do it.
- If you don't know, say you don't know, but offer to find the answer and get back in touch with the politician or staff as soon as possible.

## √ Listen

- Being a good listener is crucial because it will help you have a better dialogue and not misunderstand any commitment the politician may make to you.
- Don't hear only what you want to hear. For example, "I want to be with you on this," does not mean that they are. "I want to help you," is not a commitment that they will.
- If necessary, follow up with specific, focused questions to make sure you understand what the politician means. Remember not to be confrontational.

## √ Frame the Issue as it Affects the Politician and be Prepared to Help him or her Solve Any Political Problems

- Be sensitive to particular peculiarities within the region. Your case will be stronger and more compelling if you present the issue as the politician and staff see it.
- Acknowledge difficulty politicians may have. They may be more likely to fight for you if they know you have an appreciation of what's at stake for them.
- Once you've recognized the political problem the politician faces, try to create a win-win situation. Recognize you seldom get everything you ask for and compromise is important.
- Remember that the politician wants to keep his or her job, just as you want to keep yours. Therefore, politicians want to please as many people as possible. Help them do that.

## √ Work with Staff

- Never view staff as a "second resort." Politicians depend heavily on their staff.
- Get to know key staff people in an office – receptionist, chief-of-staff, administrative assistant, and other representatives.
- Understand that over time, staff tends to take on the traits, outlook, and judgment of their employer.
- Learn the needs of staff, as well as their style, and be able to work with them as well as the politician.

## √ Be Flexible

- Visits rarely go exactly as planned. Politicians may get delayed in a committee hearing or a roll call vote may occur in the middle of your meeting. If you stay flexible and positive, the visit will be much more successful and pleasant.

## √ **Thank and Follow Up With the Politician in a Timely Fashion**

- Politicians hear complaints all the time and, just like anybody else, they feel rewarded when they're shown appreciation for actions they may have taken on your behalf.
- Make sure your thank you note includes a brief summary that repeats the major points or specific requests for action that you discussed during the meeting.
- Share all the information from your visit with the HAHC, so they can help with any follow-up action and integrate your information with other coordinator actions or visits.

## **BUILDING A RELATIONSHIP WITH POLITICAL STAFF**

Building a good working relationship with the staff is as important as developing a relationship with the politician. Staff are more accessible and tend to move the process along. And politicians rely heavily on information provided by their staffs in making decisions and taking positions on policy. You are most likely to be connected with staff, rather than the politician, when you call a political office. Staff may be substituted for politicians in face-to-face meetings.

Staffers' level of expertise on health improvement issues will vary considerably, depending on the committee assignments of the politician and the tenure of the staffer. Politicians who sit on the key committees responsible for health will most likely have personal staff members who focus on health issues. Staff without health committee assignments may have health as only one of many issues for which they are responsible. Most staffers will appreciate your efforts to explain complex health issues in easily understood terms – particularly if health is not their primary issue.

While regional office staff are usually not experts on policy, they should still be included in your grassroots advocacy strategy. They are the eyes and ears for the politician on how issues are developing in the community. Information you provide on the local impact of proposed policy will be well received by them and communicated to the politician.

## GRASSROOTS ADVOCACY

Once you have mastered the basic grassroots advocacy vehicles of letters, phone calls and meetings, you may want to take additional steps to enhance your developing relationship with your politician. The following is just a sample of the other activities you could undertake.

### **Additional Advocacy Approaches and Opportunities:**

- ❑ **Survey your staff and board members** to determine if any of them have personal relationships or friendships with your political representatives. If they do, involve them in communicating your grassroots message.
- ❑ **Organize a letter writing campaign** in your city on an important health issue. Set up a table in a break room or outside the cafeteria with sample letters and computers or writing materials. Provide some recognition for participants – a pin, ribbon, or sticker identifying them as a grassroots advocate.
- ❑ **Form coalitions with other organizations** and influential individuals who may share your position on specific health issues.
- ❑ **Offer to coordinate a community forum on health issues** for you local politician.
- ❑ **Write a letter to the editor for your local newspaper**, describing the impact of proposed policy and giving your networks opinion on the appropriate political action (pass, defeat, amend, etc.). Political offices subscribe to clipping services to keep tabs on local concerns.
- ❑ **Put your local politician on the mailing list for your organizations newsletter.** Publicize your politician's positions on health issues in your newsletter.