

***Productive
Teamwork***

Use this list to highlight the strengths and weaknesses of your team.

- Key:
- 1 (low evidence)
 - 2 (some evidence)
 - 3 (high evidence)

Your team's purpose

1. Our team has a shared vision.	1	2	3
2. Team members can communicate the vision to outsiders.	1	2	3
3. Team members have a shared mission and can state the team's reason for being.	1	2	3
4. Our team members have the authority to implement the plan.	1	2	3
5. Meetings are purposeful and relate to the vision and mission.	1	2	3
6. Goals and outcomes that extend from the vision are specific, measurable, achievable, realistic, and time-limited.	1	2	3
7. Our team knows what decisions we can and cannot make as we move toward the vision.	1	2	3

Team members' interactions with one another

8. Team members know their roles, responsibilities, and primary functions.	1	2	3
9. Ground rules or guidelines for how members work together have been established.	1	2	3
10. Ground rules are enforced consistently.	1	2	3
11. Our team understands team development and group process.	1	2	3
12. There is full and balanced participation within the team.	1	2	3
13. Listening is a key behavior in communicating within the team.	1	2	3
14. Team members feel safe in disagreeing or bringing controversial issues to the surface.	1	2	3
15. All ideas are fairly considered and evaluated against the mission and vision of the team.	1	2	3

A Teamwork Checklist

We don't accomplish anything in this world alone . . . and whatever happens is the result of the whole tapestry of one's life and all the weavings of individual threads from one to another that creates something.

—Sandra Day O'Conner

Key: 1 (low evidence)
 2 (some evidence)
 3 (high evidence)

16.	Conflict is seen as normal and an opportunity for reflection.	1	2	3
17.	Team members treat each other with respect even when conflict arises.	1	2	3
18.	Conflict is handled effectively by focusing on the team's goals.	1	2	3
19.	Team members have an effective communication network.	1	2	3
20.	Team members are open to taking on different roles than initially identified and assigned.	1	2	3
21.	Team members know how to give and receive effective feedback that strengthens the teamwork.	1	2	3
22.	Team members capitalize on each other's strengths.	1	2	3
23.	Team members trust each other's intentions and commitment.	1	2	3
24.	Team members respond with sensitivity and appreciation to issues of diversity.	1	2	3
25.	When needed, the team welcomes new members and helps them become integrated into the team process.	1	2	3
26.	The team nurtures members in times of stress or personal challenge.	1	2	3

The team's functions

27.	Our team is coordinated by a recognized and respected leadership system.	1	2	3
28.	Our team has members with diverse backgrounds, skills, and knowledge.	1	2	3
29.	Meetings are organized and time-limited, to optimize group work.	1	2	3
30.	Meetings are managed with clear agendas that relate to the team's purpose.	1	2	3

- Key:
- 1 (low evidence)
 - 2 (some evidence)
 - 3 (high evidence)

31.	Our team's plan of work is agreed upon by the necessary authorities and the team members.	1	2	3
32.	Work assignments are clear and reasonable.	1	2	3
33.	There is accountability for completing tasks.	1	2	3
34.	Team members have the resources and materials necessary to complete their work.	1	2	3
35.	Guidelines for making decisions have been established.	1	2	3
36.	Team members bring diverse opinions to the group.	1	2	3
37.	Our team strives to use individuals' knowledge and experiences and we integrate them into our work.	1	2	3
38.	Decisions are based on accurate, comprehensive, timely information.	1	2	3
39.	Our team feels we have the appropriate people involved in our work.	1	2	3
40.	Our team supports creative thinking and solutions.	1	2	3
41.	Our team shows continuous improvement in how we perform.	1	2	3
42.	Our team adapts as new information and challenges arise.	1	2	3
43.	Our team strives to collaborate effectively with other groups.	1	2	3

Accountability

44.	Our team evaluates internal and external factors that may affect our goals.	1	2	3
45.	Our team seeks outside expertise as needed.	1	2	3

*There is no "I"
in t-e-a-m.*

—Anonymous

Key: 1 (low evidence)
 2 (some evidence)
 3 (high evidence)

46. Our team periodically evaluates our progress and what goals we have achieved.	1	2	3
47. Our team reports our performance and progress to external groups.	1	2	3

The team's value

48. Team members perceive their individual service to be valuable.	1	2	3
49. Team members display commitment and enthusiasm for our purpose.	1	2	3
50. Team members have opportunities for learning and personal growth.	1	2	3
51. Our team celebrates successes.	1	2	3
52. Our team uses setbacks and mistakes as opportunities to learn.	1	2	3
53. There is public recognition of the team's work and value.	1	2	3
54. Team members feel that personal growth is an outcome of our involvement on the team.	1	2	3

Resources:

Harrington-Mack, Deborah. 1994. *The team-building toolkit: Tips, tactics, and rule for effective workplace team*. New York: New Directions.

Lloyd, Sam R. 1996. *Leading Teams: The Skills for Success*. West Des Moines, Iowa: American Media.

Ponder, Randall D. 1998. *The Leader's Guide: 15 essential skills*. Central Point, Ore.: Oasis Press.

Nagy defines organizational structure as “the framework around which the group is organized . . . the operating manual. . . [It] describes how members are accepted, how leadership is chosen, and how decisions are made and does so without apology.” According to Nagy, defining structural components of the planning team early in its formation is necessary for success because structure:

- ♦ gives team members clear guidelines on how to proceed during disagreements or arguments
- ♦ binds team members together because structure gives meaning, identity, regularity, and order to the group
- ♦ is inevitable. Whether or not your team develops structural components deliberately or informally, a structure will emerge. So, it is better to go ahead and plan the structure that your team feels most comfortable with and thinks will most likely ensure success instead of falling into whatever structure happens to evolve from the team’s early meetings.

This section focuses on four common structural components that may be useful to your planning team: ground rules, leadership roles, committee structure, and bylaws. Your team’s vision and mission statements provide important structure to its work as well, and you can find detailed information about developing vision and mission statements in the sections “Why Plan Well” and “That Vision Thing.” The structure of your planning team will likely evolve over time, and it may be valuable to revisit this section at different points in your team’s work.

Ground Rules

Creating ground rules is one of the first activities your team should undertake, even before you develop your vision and mission statements. As Nagy notes,

A partnership that has a broad membership base brings together people from varied backgrounds who may or may not have collaborated before. As such, one of the first tasks in a group planning process is to *agree on how to work together*. This can be established through the establishment of mutually agreed upon ground rules.

Ground rules are important to a team’s success because they

- ♦ help remind people how they are expected to interact and behave within the team
- ♦ make it easier to stop nonproductive behaviors (group members can be reminded of the ground rules easily and in a less personal manner)
- ♦ help new members of the group quickly know what is expected of them.

Giving Structure to Your Planning Team

Eighty-five percent of the problems that affect quality reside in the organization’s structure, not in individual performance.

—Peter Senge

The ground rules you develop together must meet your team's unique needs and responsibilities and with your individual group members' personalities in mind. For this reason, there is no list of ideal ground rules that will work for all groups. Ground rules can include anything relevant to the way your team will work together, from starting and stopping meetings on time, to maintaining confidentiality of meetings when appropriate, to treating everyone's viewpoints with respect, to using active listening skills. To get a feel for what kinds of ground rules others follow, if you search the Web, you will get a long list of the rules other organizations have adopted. You also might ask other groups in your community to share their ground rules with you.

To ensure that all team members feel comfortable with and will agree to follow the ground rules, the entire team should develop the ground rules together. Try to keep them as short and straightforward as possible so that there is no confusion or possible differing interpretations of the rules.

Some teams ask each member to sign a copy of the ground rules as a visible sign of agreement. More commonly, teams post a copy of the ground rules (large enough so that members can read it from any seat in the room) in a visible location during all meetings. Posting helps remind team members that ground rules are in effect and often makes it easier to enforce them when necessary.

See the chapter called "Group Decision Making and Process" for an exercise on developing group rules and norms. Development of your team's ground rules will likely be its first successful endeavor together and should be acknowledged as such. Remember to celebrate along the way!

Common Leadership Roles within a Planning Team

Leadership, as discussed in the chapter on Leadership Skills, is essential to a successful, accomplished, evolving, and enjoyable planning team experience. In a planning team, there are numerous opportunities to provide leadership—both formal and informal. A crucial element of developing your planning team's organizational structure is to determine the types of leadership your team needs and the roles and responsibilities that people in each position will assume. There are no set roles that a planning team *must* have in order to be successful. Rather, they should respond to your team's needs, strengths, and potential activities. However, here are some common leadership roles and responsibilities.

Chairperson

- ◆ manages/facilitates all meetings, unless there is a special outside facilitator

- ◆ may manage the meetings of the executive committee, if you have one
- ◆ serves as an ex-officio member of all committees
- ◆ can call special meetings if necessary
- ◆ establishes the agenda (in conjunction with the Executive Committee if there is one)
- ◆ serves as the main contact person for media inquiries and public contact, unless your planning group assigns this function to some other person or committee
- ◆ represents the planning team at public functions or in meetings with other groups, or assigns a member to act in his/her place
- ◆ assigns tasks and deadlines
- ◆ motivates the members to action
- ◆ can establish committees and assign committee chairs.

Facilitator

See the chapters on facilitation and managing meetings.

- ◆ acts in a completely neutral manner
- ◆ encourages participation and active listening
- ◆ coordinates the logistics of the meeting
- ◆ ensures that all group rules are enforced and that members remain respectful when they disagree
- ◆ helps the team come to a “middle ground” on contentious issues and find win/win solutions

Vice Chair

- ◆ understands the responsibilities of the chairperson
- ◆ attends all meetings and is up-to-date on the details of the planning team’s operation
- ◆ acts as chairperson when the chairperson is unable to attend a meeting or suddenly resigns
- ◆ serves on the executive committee, if your planning team has one
- ◆ carries out special assignments given by the chairperson
- ◆ may be asked to chair committees of importance

Secretary or Recorder

- ◆ serves on the executive committee, if there is one
- ◆ records all meetings of the local planning team (not of the committees, though. Each committee will likely have its own recorder.)
- ◆ coordinates the minutes of all committees and subcommittees
- ◆ often writes correspondence on behalf of the team
- ◆ maintains records of the minutes and team correspondence

- ♦ distributes minutes, meeting announcements, and agendas
- ♦ contacts members if a meeting must be cancelled or rescheduled
- ♦ acts as chair if the chairperson or the vice chair is unavailable.

Treasurer

(if your planning team has funding)

- ♦ serves on the executive committee if there is one
- ♦ chairs the finance/budget committee
- ♦ assists in preparation of the budget and authorizes disbursement of funds
- ♦ keeps accurate financial records
- ♦ reports on the team's financial status at every team meeting
- ♦ often helps develop fundraising plans.

Committee Chair

- ♦ generally is assigned by the chairperson
- ♦ facilitates meetings of the specific committee
- ♦ recruits additional committee members as needed
- ♦ assigns tasks and deadlines within the committee
- ♦ reports on the committee's work to the full planning team at each meeting

Your planning team may need for additional leadership roles. Whatever roles the team decides to implement, the position(s), tenure, and responsibilities should be spelled out clearly in your team's bylaws to avoid confusion or problems. In the early stages of developing the planning team, it's not unusual for the people who took steps to develop the planning team find themselves in leadership positions. As your team matures, however, more formal methods of appointment may be necessary. For example, in many planning teams, a nominating committee submits nominations to the full planning team, which then elects the people to fill the leadership positions. The exception to this rule is the role of committee chairs, who are usually appointed by the chairperson of the full planning team.

Does Your Team Need Committees?

Forming committees can help to accomplish the planning team's work in a relatively quick and efficient manner. However, your team should make sure that committees are only developed when necessary. Too many of them can cause duplication of efforts (if communication within the team isn't perfect) and make members begin to worry about the amount of time they are spending on the team's efforts. The use of com-

committees will be individualized to your team, its goals and expected outcomes, and the work required during a given timeline. Some planning teams may have one or two committees, while another may have six or seven.

In general, your team may want to consider establishing a committee or committees when

- ♦ there are ongoing activities that need to be managed during the whole planning process (publicity, data gathering and analysis, for example)
- ♦ an issue is too big or complex to be handled by one person
- ♦ an issue is too complicated for the entire team to tackle at its general meetings
- ♦ more information is needed before the entire team can make a decision,
- ♦ there are short-term activities that require intensive work and effort.

In addition, according to Susan Humphries, the use of committees helps

- ♦ ensure equal distribution of work among team members
- ♦ give members the chance to become involved in leadership opportunities (thus building future leaders) and policy decisions
- ♦ use the special skills of each member to best advantage
- ♦ help inexperienced members feel more comfortable and gain confidence
- ♦ assist the entire team in conducting business more efficiently at the overall team meeting.

When creating committees, Carter McNamara suggests that each committee:

- ♦ has a specific charge or set of tasks to address
- ♦ contains at least two, and preferably at least three, team members to share the work,
- ♦ reports to the planning team at each meeting
- ♦ considers involving people who are not on the planning team.

Minutes should always be taken during committee meetings and shared with the overall planning team. Susan Humphries has a short committee report form in her publication for the Government of Ontario, "Effective Committees," that your team may find useful. This form lists the name of the committee, the committee's assignment, key discussion points during the meeting, recommendations or points for further discussion, and names of the committee members who attended.

There are two types of committees, *standing* and *ad hoc*. Standing committees are likely to operate for the entire time

that your planning team operates. Nagy outlines some examples of standing committees and their responsibilities.

- ◆ *Steering Committees*
 - ◆ are often the first group of people who pull together to start a community planning process
 - ◆ create plans for recruitment, fundraising, and organizational structure and development
 - ◆ metamorphose into a coordinating council when the planning process has taken off.
- ◆ *Executive Committees (also called Coordinating Councils)*
 - ◆ are made up of the leadership of the planning team
 - ◆ oversee the operations of the planning team including agenda setting, training, communications, and logistics
 - ◆ ensure communication and coordination between other committees
 - ◆ act on behalf of the planning team between meetings
 - ◆ meet more frequently than the overall planning team
 - ◆ are usually comprised of the planning team leadership.
- ◆ *Marketing/Public Relations Committees*
 - ◆ create materials to publicize the planning team's activities
 - ◆ contact the media to draw attention to the planning team's work
 - ◆ develop and implement a marketing plan for the team.
- ◆ *Finance Committees*
 - ◆ oversee any grant funds or donations
 - ◆ develop the planning team's budget for the fiscal year (if your planning team has funding)
 - ◆ ensure tracking and monitoring of income and spending.
- ◆ *Fundraising Committees (could be standing if fundraising is continuous or ad hoc if your planning team only has one or two fundraising events)*
 - ◆ establish and implement a fundraising plan
 - ◆ plan and conduct fundraising events
 - ◆ ensure that all planning team members have roles in fundraising events.
- ◆ *Team Development Committees*
 - ◆ develop orientation materials for new planning team members

- ♦ recruit and recommend to the full planning team new members when necessary
- ♦ meet with and orient new planning team members
- ♦ survey team members to determine what types of training needs they have in their roles
- ♦ develop or coordinate team trainings or retreats.
- ♦ *Bylaws Committees*
 - ♦ develop draft bylaws for recommendation to the planning team
 - ♦ ensure adherence to the bylaws
 - ♦ recommend revisions when necessary.

Usually, standing committees are identified in a planning team's bylaws (see below). Ad hoc committees, on the other hand, are generally appointed short term to complete a specific activity or action. Once their task has been completed, the ad hoc committee ceases to exist. Here are some examples of ad hoc committees and their responsibilities.

- ♦ *Initial Recruitment Committees*
 - ♦ Might be composed of a few people that have strong ties to the community and know the “movers and shakers” personally
 - ♦ Initially identify the major stakeholders within the community
 - ♦ Invite or recruit stakeholder to join the planning team.
- ♦ *Nominations Committees*
 - ♦ identify leadership skills in planning team members
 - ♦ make nominations for leadership positions.
- ♦ *Events Committees*
 - ♦ plan and implement a specific major event (such as a fundraiser, a public forum, focus group)
- ♦ *Issues Committees*
 - ♦ research a specific issue, policy, or service
 - ♦ complete specific Core Service Evaluation Tools
 - ♦ make recommendations to the planning team on a specific issue.

Both standing and ad hoc committees usually report to the full team. Committees usually make *recommendations* to the full team, which makes the final decision based on a committee's work. In addition, a standing or ad hoc committee may elect to develop subcommittees to complete smaller parts of its overall work. The subcommittee should report to the committee that initiated it.

Developing Bylaws

In many states, including North Carolina, creating bylaws is one of the necessary steps in pursuing nonprofit status. How-

ever, bylaws may be helpful to your planning team even if that isn't your goal.

While ground rules help indicate individuals' appropriate *behaviors* during team meetings and interactions, bylaws are a set of rules that govern the *structure* of your team and its *operations*. Bylaws outline the day-to-day activities of the team and indicate in writing the ways the group should function together, as well as the roles and responsibilities of the leaders and members.

It may be useful to develop your team's bylaws and initial leadership and committee structure after you have identified your vision and mission. Not every team needs bylaws—they aren't usually needed for teams that have been brought together for a short period of time for a very specific issue. Chris Hampton, in the University of Kansas's *Community Toolbox*, lists a few situations when bylaws should be considered:

- ♦ when your organization is just starting out [and you need to give structure to it]
- ♦ when you feel the need to clarify how officers are elected, the organization's purpose, or other basic matters in how the group operates
- ♦ when your organization is undergoing change
- ♦ whenever your organization wants or needs to apply for nonprofit status.

Because creating bylaws takes time and energy, many teams find it useful to appoint a standing committee to develop draft bylaws to bring to the entire planning team for discussion and revision. Again, a quick Web search will turn up the bylaws of many different organizations, which may provide you with models. Draft bylaws must be voted on and accepted by the full team before they can be implemented.

Although bylaws vary from organization to organization, many contain the following information.

1. the name of the group and when it was established
2. the purpose of the group (vision and mission statements fit in here)
3. membership requirements, including
 - ♦ eligibility requirements
 - ♦ types of membership (voting, nonvoting, honorary, etc.)
 - ♦ attendance requirements and other responsibilities
 - ♦ members' rights
 - ♦ term limits of members
 - ♦ rules for resignation, reinstatement, and termination of members.
4. leadership
 - ♦ composition of the leadership team (officers, other members)
 - ♦ terms of office,

- ♦ nomination and election process (including the number of votes necessary for election)
 - ♦ duties or responsibilities of office.
5. committees
 - ♦ a listing of standing committees
 - ♦ how the chair of the committee is appointed
 - ♦ terms of office
 - ♦ how the members of the committee are appointed
 - ♦ how vacancies are filled
 - ♦ how any ad hoc committees will be developed, members appointed, and leadership identified.
 6. membership meetings
 - ♦ regular meetings: number per year, location, and method of notice of meeting
 - ♦ annual meeting: when held, purpose (such as to elect new officers, development of new year's priorities, etc.),
 - ♦ voting: quorum, whether voting by proxy is acceptable, which types of vote require unanimous votes and which just a majority
 - ♦ special meetings: when they may be called, who has the right to call them, and how members will be notified.
 7. financial administration (if your team has or may have income from grants, donations, services)
 - ♦ the fiscal year being used
 - ♦ budget submission: when, by whom, type of vote—unanimity or majority—necessary to pass
 - ♦ handling of contracts, checks, payments, and funds: who can sign checks, authorize contracts, etc.
 8. amendments
 - ♦ how the bylaws can be amended, including the number of members needed to vote for the amendment in order for it to pass
 - ♦ amount and type of notice of proposed changes that must be given to members.
 9. dissolution of group
 - ♦ conditions under which the team might be dissolved
 - ♦ who has the authority to dissolve the team.

Resources

General

Nagy, Jenette. Organizational structure: An overview." *The Community Toolbox*, http://ctb.ku.edu/tools/EN/sub_section_main_1092.htm

Morrison, Emily Kittle. 1994. *Leadership Skills*. Tucson, Ariz.: Fisher.

Ground Rules

Community Partnerships for Older Adults. Establishing ground rules, <http://www.partnershipsforolderadults.org/resources> (Click on

“Strategic Planning” and then on “Getting Started.” Ground Rules will be listed underneath.)

Committees

Board Cafe Newsletter. 1999, January. Should boards have committees, and if so, which ones? http://www.boardcafe.org/bc1999_01.html

McNamara, Carter. Typical types of board committees. Written for The Management Assistance Program for Nonprofits, <http://www.mapnp.org/library/boards/brdcmtte.htm>

Susan Humphries. Effective committees. Written for the Government of Ontario: Ministry of Agriculture and Food, <http://www.gov.on.ca/OMAFRA/english/rural/facts/94-015.htm>

Bylaws

Hampton, Chris. Writing bylaws. The Community Toolbox, http://ctb.ku.edu/tools/en/sub_section_main_1098.htm

Heimlich, J. E., and S.H. Dresbach. Written documents for community groups: Bylaws and standard operating procedures. <http://ohioline.ag.ohio-state.edu/cd-fact/co-bl.html>

Minnesota Council of Nonprofits. How to start a non-profit: Sample bylaws, <http://www.mncn.org/info/samplebylawswithmembers.pdf>

The planning team is the heart and soul of the planning process. Each member of the team will be responsible for working collaboratively for an extended time to accomplish the team's goals, providing information and opinions, securing resources, evaluating the long-term care system in your community, developing strategies for reforming it, advocating for reform, marketing the strategic action plan, and following through with implementation activities—all in a collaborative and supportive manner. The success of the planning process is directly linked to the people you have on your team. Thus, identifying and recruiting potential planning team members is perhaps the most important responsibility you'll have as lead agent, and it may require lots of time and energy on your part during the first few months of the planning process.

Identifying Team Members

In recommendation 16 of *A Long Term Care Plan for North Carolina: Final Report*, the Institute of Medicine developed a list of stakeholders that should serve as the “base” of your planning team:

- ◆ older adults
- ◆ disabled adults
- ◆ caregivers
- ◆ the Area Agency on Aging that serves your county (which should include representation from the Ombudsman program)
- ◆ Community Advisory Committees
- ◆ community leaders
- ◆ your county's Department of Social Services
- ◆ your county's Health Department
- ◆ the HCCBG lead agency in your county
- ◆ the CAP-DA lead agency in your county
- ◆ any hospitals that serve your county's residents
- ◆ home health agencies
- ◆ nursing homes
- ◆ assisted living facilities
- ◆ adult day care/day health programs
- ◆ group homes for people with mental illness or developmental disabilities
- ◆ independent living facilities
- ◆ advocates
- ◆ local government.

However, this list is just a start. Your planning team should have as wide a representation as possible, and invitations should be extended to any local stakeholder with an interest in long-term care reform. It may be helpful to talk to some of the key stakeholders in your community, especially those serving different populations or geographical areas than your or-

Identifying and Recruiting Planning Team Members



ganization, to determine who else should be invited to the table. Your list may also include:

- ◆ media outlets
- ◆ local foundations
- ◆ human resource directors from large businesses in your community
- ◆ universities or community colleges with related departments
- ◆ faith organizations
- ◆ your local United Way
- ◆ libraries
- ◆ veterans' organizations
- ◆ "baby boomers"
- ◆ influential citizens
- ◆ grassroots organizations
- ◆ organizations targeting specific cultural groups
- ◆ law enforcement and first responders
- ◆ city or county planners
- ◆ service organizations (Lions Club, Rotary).

As your planning team begins meeting, your membership will probably grow. Your team members should feel free to bring other relevant organizations and/or consumers to the meetings with them.

Recruiting Team Members

Before contacting potential team members, do a bit of homework.

- ◆ Develop a list of specific people to contact at each organization based on your own personal experiences, information from other key stakeholders who know the organization well, or from information on a website or in a phone directory.
- ◆ Think about the potential team member's interests and determine ways to "sell" the planning process to the person (or their supervisor).
- ◆ Develop a one-page (or shorter!) document for use as a marketing tool to potential team members describing the proposed planning process and why it is needed.
- ◆ Create a short job description so that potential team members and their supervisors understand what will be expected.

To contact potential members, you can always send out a mass e-mail or form letter, but that method of recruitment probably won't be as effective in recruiting from groups and organizations with which you haven't worked closely in the past. Instead, try a personal approach:

- ◆ Ask to be placed on the agenda at other meetings you attend or that reach a large audience, briefly

- describe the planning process, and ask for volunteers.
- ♦ Talk to key stakeholders one-on-one after other meetings or other events.
- ♦ Call an informational meeting to discuss the planning process and recruit volunteers. Make sure to publicize it well (see the chapter on social marketing for some additional suggestions).
- ♦ Telephone potential members, and ask them to participate.
- ♦ Ask local service providers to recommend or recommend you to their consumers.
- ♦ Send a *personal* e-mail or letter to each potential member.

For groups and individuals that you do not know personally or have not worked with:

- ♦ Ask a colleague or established member of the planning team who knows the stakeholder to contact that person and offer an invitation to join your team.
- ♦ Ask to speak at a meeting where the groups or individuals will likely be.
- ♦ Post fliers and posters in well-traveled public areas.
- ♦ Use the media to distribute information asking for volunteers (e.g., newspaper ads, ads in newsletters for service providers, public service announcements on local TV and radio stations).
- ♦ In public hearings or focus groups conducted during the first few months of the planning team's work, reach out to anyone who seems to be very interested in participating.

Resources

- Axner, Marya. Building and sustaining relationships. *The Community Toolbox*, http://ctb.ku.edu/tools/en/sub_section_main_1139.htm
- Berkowitz, Bill. Involving key influentials in the initiative. *The Community Toolbox*, http://ctb.ku.edu/tools/en/sub_section_main_1083.htm
- . Promoting participation among diverse groups. *The Community Toolbox*, http://ctb.ku.edu/tools/en/section_1079.htm
- Ellis, Susan. 2002. *The Volunteer Recruitment Book*. Philadelphia: Energize Books. (See also their website, <http://www.energizeinc.com/art/electbooks.html>, which offers a number of free electronic books on volunteer recruitment and management.)
- Institute of Medicine. 2001. *A Long-Term Care Plan for North Carolina: Final Report*, <http://www.nciom.org/lcfinal.pdf>
- Kennedy, Jacquie, and Paula Chairmonte. *Handbook of Volunteer Management*. NC Commission on Volunteerism and Community Services. To obtain a copy, call the NC Office of the Governor at (919) 715-3470 or (800) 820-4483.
- Little, Helen. 1999. *Volunteers: How to Get Them, How to Keep Them*. Napierville, Ill.: Panacea Press.
- Nagy, Jenette. Recruiting volunteers. *The Community Toolbox*, http://ctb.ku.edu/tools/en/sub_section_main_1107.htm

*People who
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football
defences or the
problems of
modern society.*

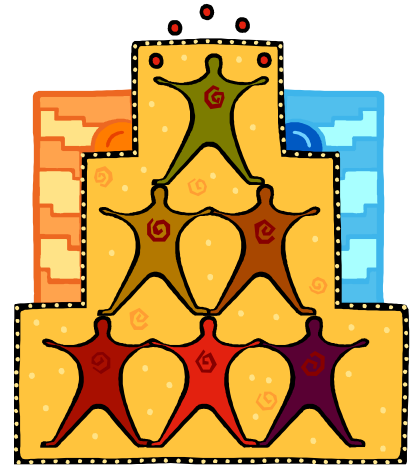
—Vince Lombardi

Within any planning process, there are multiple opportunities for recruiting and using volunteers. This can be a challenging task, even when the focus of the planning effort is a strong interest of those volunteering. Some volunteers may be paid staff from other agencies and organizations, who are “volunteering” their time to be part of the planning group. It is important to determine from the beginning their availability and, if need be, their supervisor’s interest in providing agency or organizational time for the person’s involvement. It is also essential to be realistic about the time and energy required, to prevent misinterpretations of what the “employed” volunteer is expected to contribute and misunderstandings about future contributions. As with any other member of the planning group, it is essential to match the skills, knowledge, and expertise of the volunteer with the needs and tasks of the process, to support accountability, sustained interest, and the project’s outcomes. Additionally, the “employed” volunteer’s participation should provide opportunities for collaboration and networking as well as support direct or indirect benefits for the person’s employer. A concrete answer to the question, “What’s in it for them (the agency or organization)?” bodes well for continued support and interest.

Other volunteers may give time and expertise independently, without being part of an organization. These include consumers, caregivers, and other interested citizens. It is helpful to remember that volunteers come in all shapes and sizes, with different stakes in the process and diverse reasons for becoming involved. The core planning team should develop a list of skills and jobs for which they may need short- or long-term volunteers. This assists in identifying good matches between the person and task and promotes communication among all parties.

Keep an open mind when it comes to recruitment. Consider those who will benefit the most from the objective of your planning and look for ways to engage them in the process. Involve all planning participants in developing your list of prospective volunteers. As people consider the social and professional networks with which they are involved, the resulting potential pool of possibilities becomes larger than if just one or two people are responsible for coming up with names. Look for ways to access untapped resources. For example, if your planning involves stakeholders who are not often invited to volunteer—for example, those with disabilities—find ways to engage them as active participants with assigned jobs and perhaps supportive personnel (see Chapter 32 later in this section). This not only taps an often-overlooked resource but also sends a powerful message about the vision and mission of your planning effort.

Recruiting and Retaining Volunteers



Be willing to make specific and concrete requests. People are more likely to say yes when they have a clear understanding of what the team needs. Organizationally, have a “go to” person for volunteers to contact.

Key Points in Recruitment

1. Give things away. A T-shirt, hat, yo-yo, key chain, or other inexpensive token can remind volunteers frequently of your project’s vision and appreciation.
2. Use word-of-mouth. Talk up your project everywhere. Tell everyone to tell everyone they know whom they think might be interested. Have specific information available that explains your project and whom to contact to learn about participating. List options for participation so people can find a good match for their time and interest.
3. Advertise through newsletters, websites, newspapers, mailing lists, and other accessible media. Share your project’s needs at meetings, with boards, faith-based organizations, community centers, etc.
4. Target groups or individuals for recruitment with an eye to marketing your effort and the benefit to them for their involvement.
5. Work through the network. Agencies know consumers who can and might participate.

Key Points in Retention

1. Develop job descriptions so that people interested in volunteering know what they are committing themselves to do.
2. Make it a top priority to ensure that all volunteers are involved and appreciated. They should have a task, a purpose, and someone who notices their contribution.
3. Have a mechanism for sharing what the assigned task is, how to do it, and the importance of it to the project’s vision. People need to understand the “why” behind the “what” they are doing.
4. Be clear about the vision and the benefit of the project and be able to articulate it clearly and concisely. People are more likely to act responsibly if they feel they are charged with something that matters.
5. Allow for flexibility in task assignment and use of personnel. Don’t overwork those who are likely to say yes to every request. Build in some fun for the mundane tasks that are part of any large project. Find ways for individuals to shine in public.

6. Provide motivators for volunteers who have to show up for special training or meetings. Provide food, treats, and a pleasant, rewarding environment.
7. Respect volunteers' time by having clear expectations, sticking to agreed-upon time frames, and providing timely information and assistance.
8. Be open to assigning titles besides "volunteer." Some possibilities include: host, greeter, facilitator, team leader, recorder, and event planner. This explains their role publicly and helps define their responsibilities.
9. Communicate, communicate, communicate. Use memos, e-mail, newsletters, and phone calls to make sure volunteers know the what, where, when, why, and how of their involvement. This demonstrates to them how much their participation matters.
10. Show your appreciation with public and private thank-yous, special letters from acknowledged leaders (such as the mayor or chair of the county commissioners), certificates of appreciation, individualized cards or e-mail, and regularly scheduled public events (e.g., a special banquet). Because you will continue to need your volunteers, be sure they know they made a difference.

What Volunteers Need

- ◆ specific, manageable tasks with reasonable time frames
- ◆ tasks that match their reasons for and interest in volunteering
- ◆ an understanding of why their task is important
- ◆ clear, concise instructions they understand
- ◆ flexible deadlines that take into consideration their personal time constraints
- ◆ sufficient supplies and information to complete the task
- ◆ training, if the task is new to them
- ◆ someone to go to with questions or suggestions
- ◆ follow-up, so volunteers and supervisors alike know the task is done
- ◆ genuine appreciation that makes them feel they did something worthwhile.

Resources

- Little, Helen. 1999. *Volunteers: How to Get Them, How to Keep Them*. Naperville, Ill.: Panacea.
- McNamara, Carter. Developing and managing volunteer programs, <http://www.mapnp.org/library/staffing/outsrcng/volnteer/volnteer.htm>
- Rusin, Jo. 1999. *Volunteers Wanted: A Guide to Finding and Keeping Good Volunteers*. Mobile, Ala.: Magnolia Mansions Press.

Volunteers are like rare gems. When placed in the right setting and cared for, they will shine and give pleasure to all who see them.

—Source unknown

The importance of consumers to your community's planning process and planning team cannot be overemphasized. The underlying reason for almost every community planning process is to make the system better for those who use it—consumers. As the people using long-term care services and experiencing programs firsthand, consumers are the best resource to tell your community what works well and what needs to be changed.

Along with firsthand experience, consumers bring tremendous and unique benefits to planning teams. They can offer irreplaceable and riveting insights into issues and barriers, usually in a completely honest and open manner. Often, consumers offer refreshing energy and creativity, because they would not have joined the team unless they truly believed in the cause. They will sometimes say or ask the things that agency representatives can't and help bring more accountability to the process (it may be hard for one agency to question another's practices publicly). They also offer a counterbalance to the unintentionally paternalistic attitudes of some service providers. When highly motivated consumers believe in the planning process and its outcomes, they will become your community's biggest advocates for reform and your best grassroots marketing resource.

Your planning team should strive to have a significant number of consumers as members. "Significant" means different things for different teams, and it is up to your team to determine the right number of consumer representatives for your planning effort. Some communities have planning teams made entirely of consumers, with agency providers solely offering technical assistance and information. Some communities have planning teams with a majority—51 percent or more—of consumers. Other communities' planning teams require that all leadership positions be held by consumers, from chair of the committee to subcommittee leaders. In any case, your community should strive to include consumers from varied backgrounds, including all ethnic and economic groups present, as well as all major geographic areas, to have the benefit of as many different experiences as possible.

The best way to find consumers willing and able to participate in your planning process is to work through long-term care service providers. Providers often know which of their consumers could and would make significant contributions to the planning team, and consumers may feel more comfortable participating if they know that the provider they have worked with and trust believes in the planning process. In addition, you can attend meetings and make presentations to groups where consumers will likely be, advertise for volunteers in publications that consumers frequently

Encouraging Consumers' Active Participation



*I wondered why
somebody
didn't do
something.
Then I
realized—I am
somebody.*

—Source unknown

read, and post fliers in senior centers, adult day care centers, doctors' offices, pharmacies, libraries, grocery stores, and public health clinics.

Making the Planning Process More Consumer-friendly

- ♦ *Make consumer participation a priority in your planning team.* Include consumer participation in your planning team's vision or mission statements, suggest that all service providers bring consumers with them to meetings, and take consumers' suggestions and ideas seriously. Consumers will sense that they are unimportant to the process if you have only asked them to participate because you needed a "token" consumer or because you "had" to.
- ♦ *Be sensitive to the distinct needs of consumers.* Unlike agency representatives, consumers are not paid to participate, and attending meetings may actually be costly for them. In addition, some consumers may have physical disabilities that must be taken into account when you organize meetings. Some of the most common needs that you should consider, as well as ideas that might help, include:
 - ♦ *ADA accessibility.* Make sure that any facility your team uses for meetings and public events is fully accessible.
 - ♦ *Transportation.* Offer vouchers or reimbursement for transportation services, ask agency representatives who work or live near consumers to provide rides, and make sure that meeting spaces are located on public transportation routes.
 - ♦ *Vision or hearing losses.* Contact consumers before their first meeting to determine if they will need specialized equipment, sign-language interpreters, materials printed in Braille or large-print, or other such assistance. If so, make sure to have any needed assistive technology at all meetings, including public events. You should also offer to save seats for consumers in locations that would help them to hear or see better, and ask team members to speak up if they talk softly.
 - ♦ *Child- or eldercare responsibilities.* Some consumers, especially caregiver representatives, may have full-time child- or eldercare responsibilities. Consider providing vouchers or reimbursement for assistance or the possibility of offering respite on-site during meeting times.

- ♦ *Physical comfort.* It is uncomfortable for people with some disabilities to sit in one place for a long time. Keep all meetings to a reasonable length, and offer breaks frequently. Provide drinks and healthy snacks if possible. If you are serving a meal, try to accommodate a variety of dietary needs and preferences (e.g., for people with diabetes or who are vegetarian).
- ♦ *Personal assistants or aides.* Encourage personal assistants and aides to attend meetings with consumers. Offer transportation vouchers for the assistant/aide, if you are offering them for the consumer. A bonus—personal assistants and aides can offer insights into the long-term care system that others can't!
- ♦ *Memory problems.* Some consumers may have slight memory problems. Make sure that everyone wears name tags that can be read across a room at all times or have your team use large-print nameplates at their seats. Send minutes from the previous meeting out a week or two before meetings. Have everyone introduce themselves at the beginning of every meeting.
- ♦ *Allow consumers to attend meetings by telephone if they are unable to leave the house that day.* Make sure you call the consumer if there are long-distance charges.
- ♦ *Avoid jargon and acronyms whenever possible.* Provide consumers with lists of long-term care terms, definitions, and acronyms to assist their understanding (see Appendixes A and B). If speakers or participants use acronyms or unfamiliar terms, the facilitator should ask them to clarify what they mean.
- ♦ *Send out any materials that will be discussed at a meeting in advance to allow adequate time for review.*
- ♦ *Provide a comprehensive orientation for consumers at the beginning of their participation.* Consumer representatives will feel more confident about offering ideas if they understand what is going on at the planning team meetings. It's important to ensure that consumers understand the long-term care system in your county, including what services are provided, what agencies provide services, major funders and how funding is allocated, common jargon and acronyms that may be used during meetings, key initiatives or programs that have made an impact on the

*Who knows the
job better than
the man close
to it?*

—Kimsey Mann

system in your community in the recent past, and the major issues and barriers affecting your community's system. It's also important to describe the planning process and role of the planning team. In addition, it may be helpful to provide information on how to be a good committee member and self-advocacy skills. Provide written materials that consumers can take home with them and review.

- ◆ *Let consumers know what is expected of them before they sign on.* Develop a job description for planning team members that outlines major responsibilities, frequency of meetings, estimated time commitment per month, expected preparation outside of meetings, etc. Have consumers review the job description before they agree to participate.
- ◆ *Consider developing mentoring relationships.* Link consumers who have limited committee experience with those seasoned consumers who have learned the ins and outs of the long-term care system and developed effective committee skills.
- ◆ *Whenever possible, put consumers into leadership positions.* As with all planning team members, work with individuals' strengths—if a consumer was the finance officer at a bank before she retired, ask her to chair the budget subcommittee. If a consumer transcribed medical records for twenty years, ask him to be the team's secretary.
- ◆ *Avoid becoming dependent on the consumers who always say yes.* Rotate jobs and responsibilities.
- ◆ *Use, and expect other planning team members to use, person-centered language.* Person-centered language emphasizes the person, not the disability. For example, instead of saying "a blind person," you would say "a person who is blind." It may be helpful to offer training in person-centered language to team members.
- ◆ *As lead agent, get to know each consumer.* Developing a personal relationship with individual consumers will help them feel comfortable discussing problems and issues with you so that you can work to address anything that impairs their participation in the planning team's activities.

Resources

Assistive Technology Community Resources in North Carolina. <http://www.pat.org/ncat.html>. [This site provides a list of specific local resources to help you provide assistive technology at meetings.]

Brain Injury Resource Center. Advocacy skills.
<http://www.headinjury.com/advocacy.htm>

- Centers for Medicare Education. Involving consumers on boards. <http://www.medicareed.org/content/CMEPubDocs/V3N8%20.pdf>
- Dayle McIntosh Center. A few tips on interacting with people who are blind and their guide dogs. <http://daylemcintoshcenter.org/voc/employers/blindtips.html>
- Hampton, Chris, and Eric Wadud. Involving people most affected by the problem. *The Community Toolbox*, http://ctb.ku.edu/tools/en/sub_section_main_1084.htm
- Independent Living Resource Center of San Francisco. Self-advocacy skills. <http://www.pai-ca.org/pubs/521501.pdf> [This material pertains to self-advocacy for fair housing, but the general concepts are applicable to self-advocacy for long-term care. It includes information on how to advocate successfully through phone calls and letters.]
- Nagy, Jenette, and Marya Axner. Understanding people's needs. *The Community Toolbox*, http://ctb.ku.edu/tools/en/sub_section_main_1135.htm
- N.C. Council on Developmental Disabilities. *People First: Guide to Understanding Developmental Disabilities*. <http://www.nc-ddc.org>. [Click on the "People First" item and you will be taken to a page where you can download the entire publication. This guide offers information on person-centered language and tips on interacting with persons with disabilities.]
- U.S. Office of Personnel Management. Federal employment of people with disabilities. http://www.opm.gov/disability/mngr_4-09.asp [This publication focuses on hiring people with disabilities, but it offers some tips to assist people with different types of disabilities in feeling more comfortable during your team's meetings.]

A fundamental philosophy behind community planning is a commitment to work together for the betterment of your community, using the entire community's "people power" to create and sustain change. It can be tempting only to gather similar people together for the planning and implementation of your change effort, particularly if these are the people who eagerly step forward to contribute and already have established relationships. It is natural to feel most comfortable with people like ourselves and to gravitate toward those with similar values, backgrounds, and characteristics. However, this ignores the value of engaging a diverse population that truly represents the people affected by the identified areas for change, as well as the people needed to implement and maintain change. Valuing diversity throughout your planning effort requires commitment, education, and actively fostering of a climate where mutual respect and equity are working principles.

Sensitive behavior to diversity is more than acknowledging differences in culture and ethnic background. It means understanding that each individual is unique in dimensions that include race, ethnicity, gender, sexual orientation, socioeconomic status, age, physical abilities, religion/spirituality, education, marital status, and geographical origin. Supporting diversity on the planning team requires an exploration and appreciation of these differences in a safe, positive, nurturing environment. It is not simple tolerance but rather stretching to embrace, use, and celebrate the rich dimensions of diversity contained within each individual and community.

Although many community planning groups agree—and state publicly—that incorporating diversity is an important part of their efforts, barriers still exist that make this one of the most challenging aspects of community work. This is partly because we often have personal deep-seated beliefs about which dimensions of diversity are acceptable to us, some of which we may not be willing to admit publicly. We all have biases and preferred values. Also, in order to be truly successful in this area, participants must be willing to move beyond their safe and familiar networks and into situations that require honest reflection about personal attitudes, healthy and open discussions, and perhaps even new behaviors. Leaders in community planning have a special responsibility in modeling openness, learning, and acceptance of differences.

Because diversity contributes to the richness of your initiative by supporting a variety of perspectives, approaches, and actions to use in strategic planning, problem solving, decision making, and implementation, it is essential to address it early on and continually thereafter. This section is meant to be a catalyst for review and discussion in your planning group. As your group wants more information, look within your com-

Supporting Diversity in Community Planning

Think only on those things that are in line with your principles and can bear the light of day. The content of your character is your choice. Day by day, what you choose, what you think, and what you do is who you become. Your integrity is your destiny—it is the light that guides your way.

—Heraclitus

munity for experts and others willing to help you become more proficient. The resources listed below may also prove helpful.

The Vocabulary of Diversity

To prevent misunderstandings and aid in communication as your group endeavors to build the value of diversity into its effort, it is important to use a consistent vocabulary. These terms and definitions may assist your group in discussions.

- ♦ *Diversity*. Loden and Rosener define diversity as having primary and secondary dimensions. Primary dimensions—age, race, ethnicity, gender, and sexual orientation—are aspects we are born with that cannot change. Secondary dimensions are elements that we have some power to change—religion, education, income, work background, geographical affiliation, marital status, and military experience. This model highlights the infinite ways in which we can be similar to and different from one another.
- ♦ *Stereotype*. A fixed and often distorted generalization made about all members of a particular group.
- ♦ *Prejudice*. Preconceived judgments and opinions (often unfavorable) based on the view that differences are weaknesses.
- ♦ *Bias*. A highly personal and often unreasoned judgment or prejudicial outlook
- ♦ *Discrimination*. Acting on prejudicial judgements and beliefs.
- ♦ *Values*. Long-held personal beliefs.
- ♦ *Culture*. The totality of socially transmitted behavior patterns, arts, beliefs, institutions, and all other products of human work and thought [that are] typical of a population or community at a given time. (*Webster's II*)

Strategies to Promote Diversity

1. Develop a shared definition of diversity.
2. Reflect on the role of valuing diversity in your vision and mission.
3. Identify the diverse elements within your community.
4. Articulate often and clearly that valuing diversity enhances the planning initiative and is an asset rather than a burden.
5. Use language that does not unintentionally exclude certain groups (for example, avoid or at least explain jargon, avoid speaking “academese” or “bureaucratese”).

6. Create a welcoming climate as new participants enter the group. Provide orientation and mentoring.
7. Engage leaders from different groups that represent the diversity of your community (or ask them to recommend others).
8. Materials you use for publicity provide a model of the world you would like to see as a result of your planning effort. Review all your information. Do your pictures show people of different backgrounds, ages, and physical abilities? Do you provide information in other languages, large print, or braille?
9. Model, foster, and expect civil and respectful discussion, regardless of the topic.
10. Model inclusion at all levels.
11. Acknowledge that everyone has biases, but support ways to learn about people as individuals in order to encourage personal growth. Include educational sessions about the culture of groups within your community.
12. Address challenges to inclusion with a respectful attitude. Be willing to listen to others' fears and concerns without retribution. Support the group's steps toward change with education, nurturing, and opportunities for success.
13. Acknowledge and bring to the surface tensions that may indicate differences in values. Use effective communication skills (group guidelines, listening, facilitation, conflict resolution; see Section III) to encourage candor within a safe environment of mutual respect and equity.
14. Avoid assumptions by asking individuals how they want to be treated as you include them in your planning efforts.
15. Allow for disagreement, but focus on shared goals and outcomes for solutions.
16. Create successes that highlight the value of inclusion.
17. Expect the process of community building that supports diversity to evolve and to have setbacks as well as victories.
18. Build on strengths and celebrate togetherness.

Resources

- Hateley, B. J. G., and W. H. Schmidt. 2001. *A Peacock in the Land of Penguins*. San Francisco: Berrett-Koehler.
- Loden, M., and J. Rosener. 1991. *Workforce America*. Homewood, Ill.: Business One Irwin.
- Rasmussen, Tina. 1996. *The ASTD Trainer's Sourcebook on Diversity*. New York: McGraw Hill.
- Webster's II New College Dictionary*. 1995. Boston: Houghton Mifflin.

If it were nothing but farmworkers in the union now, just Mexican farmworkers, we'd only have about 30 percent of the ideas that we have now. There would be no cross-fertilization, no growing. It's beautiful to work with other groups, other ideas, and other customs. It's like the wood is laminated.

—Cesar Chavez

Turfism is a term used when planning team members act in ways solely to protect the interests of their own organizations, that is, “protect their turf.” When they do this, they put the needs of their organization above the needs of consumers and the community as a whole. Instead of being open to new ideas and strategies that would benefit the system of long-term overall, these planning team members lobby for strategies that will benefit their own organization while fighting those which might change their current operations. Turfism commonly occurs in connection with funding decisions, especially in times when public and private funding is restricted, but it is often caused by worry that another agency will take over their role in the community, fear of change, or a history of bad relations with other organizations.

It's often easy to recognize team members who are protecting their turf—they are positive and cooperative when issues and recommendations come up that might benefit their organization but negative and defensive when rivals stand to benefit. They might work behind the scenes to gather support for their cause or try to intimidate others during meetings. However, some turfism is more subtle—withholding information that would benefit the group's decision making, undermining the planning team's work with others not affiliated with the team, suspiciousness regarding other team member's actions and ideas, and not attending meetings when the agenda doesn't address their own interests.

Turfism is a significant barrier to effective community planning. It can breed negativity, anxiety, secrecy, hostility, and mistrust. While turfism is a frequent and troublesome problem associated with all kinds of teams, there are some strategies that you can use at the beginning of your community's planning process to help reduce it, as well as steps you can take if it arises later on.

Strategies to Reduce Turfism from the Start

- ♦ *Recruit team members who have a history of collaboration.* More than likely, you have served on groups and committees where you have encountered some people over and over again. When inviting organizations to participate, suggest by name the people you have noticed who tend to think creatively, work for the common good, and get things done with a positive attitude. Ask others for their views on staff members in organizations with which you are not familiar.
- ♦ *Promote strong consumer participation on your planning team.* Having a strong consumer presence on planning teams usually increases the accountability of participating organizations. Outspoken consumers who have learned to work on planning commit-

Reducing Turfism Within the Planning Team

*Coming
together is a
beginning.
Keeping
together is
progress.
Working
together is
success*

—Henry Ford

tees will not hesitate to ask the questions that organizations might be reluctant to address for political reasons, and they will bring attention back to consumers' needs if an organization begins focusing on itself.

- ◆ *Promote the participation of county commissioners or managers.* Having a county commissioner or the county manager at team meetings may greatly alter an organization's actions. Most organizations do not want to appear to be protecting their turf or negative when someone who has funding authority is present.
- ◆ *Have the team establish ground rules and values at the beginning of the planning process.* Encourage the endorsement of positive team behaviors, honesty, respect, flexibility, and proper conflict management techniques. Discourage gossip, side conversations during meetings, and finger-pointing. Ground rules and values should guide every single meeting, and at times it may be necessary to review them. Also consider requesting that all planning team members sign an agreement stating that they will adhere to the ground rules and values. (See Chapter 17.)
- ◆ *Understand the climate.* In some communities, two or more organizations may have been battling each other for years. Sometimes, the current leaders of the organizations don't even know why they can't work together productively because the conflict is so old. Other times, the conflict stems from personal differences between the leaders. Before the planning process begins, talk to others in the community to anticipate whether the planning team will encounter any old grudges between organizations that can lead to turfism.
- ◆ *Model and reward collaborative behaviors.* As lead agent, make sure that you act in a collaborative and positive manner at all times. Reward collaborative behavior in other team members by drawing attention to it.
- ◆ *Keep the team focused on the consumer.* At the beginning of your planning team meetings, bring in different types of consumers to share their stories with the team. Being able to relate issues and services to real people can help some people remember why they joined the team in the first place. Bring up the individuals' stories whenever they are relevant to the discussion, to keep consumers in the forefront of everyone's mind. Instead of allowing discussions to revolve around organizations' needs and wants,

always try to bring the conversation back to consumers' needs.

- ♦ *Reduce possible conflicts of interest.* Team members have a conflict of interest, request that they abstain from voting on a motion. Consider setting a ground rule on how to deal with conflicts of interest.
- ♦ *Don't allow cliques to form.* If cliques form and build support for an organization's turfist interests, it may become necessary to assign members of the clique to separate subcommittees or change the way members are seated during meetings to break up the clique.
- ♦ *Don't wait for problems to occur.* If turf issues are likely to be a problem within your community's planning team, as lead agent you must be strong and fair and work from the first to build trust and collaboration within the team.

Strategies to Deal with Turfism That Develops During Planning

- ♦ *Address problems immediately.* Although at times it may be tempting to "cut them some slack" or to "see what happens," turfism should be dealt with as soon as it is evident, or it will likely continue and make problems in the future.
- ♦ *Get the facts.* The best way to make unbiased decisions when turfism is involved is to make sure that your team is planning and making decisions based on hard facts, and not on emotion or alliances and friendships with other team members. Postpone discussion of the issue, if possible, to a later date, when you and other team members have been able to gather the relevant data and information necessary to make a decision.
- ♦ *Bring out those negotiation and mediation skills!* Using negotiation and mediation skills will likely bring about a quicker and less contentious resolution to the issues on the table. (See the chapters on these topics in Section III.)
- ♦ *Conduct team training in communication techniques.* If the members of your planning team seem reluctant to speak up and challenge turfist ideas, consider conducting (or arranging for) training in active listening, negotiation, and assertive behaviors. Developing members' skills in effective communications techniques may give them more confidence in working through differences and conflict as a team instead of



relying solely on you as lead agent to mediate differences.

- ♦ *If two organizations or members continually fight one another, do not let their issues dominate the team.* Talk to each member separately, tell them that their conflict is hurting the team, and ask them to resolve the issue quickly on their own. If they are unable or refuse to work through their problems, you may have to have a meeting to mediate their differences. If the organizational representatives with conflicts are not the leaders of the organization, you should probably request that the leaders join the meeting. If you feel that you are too close to the issue, are uncomfortable leading the mediation effort, or do not have strong mediation skills, you should ask another team member or a community mediator to help.
- ♦ *If you, as lead agent, begin to feel that you must protect your organization, or if others start to view you as having possible conflicts of interest, consider asking another team member to facilitate or bring in an independent facilitator.* It is essential that the lead agent of a planning process be unbiased and fair. If you begin to have and act on turfist feelings of your own, others on your planning team will begin feel that they can act in similar ways. In addition, and most importantly, acting in a turfist manner will cause your team members to lose trust in you as their leader, and the planning process will face significant challenges to success. If you cannot facilitate in a completely neutral manner discussion of an issue, ask another team member to facilitate that portion of the meeting. If the issue is so contentious that no one on the team feels comfortable facilitating, or no one can act in a neutral manner, consider finding an independent facilitator or mediator.

Turfism can be one of the biggest obstacles to success for planning teams. If turfism is a problem in your planning team, it probably won't disappear overnight, no matter what you do. You and other planning team members will need to continue to battle it while developing a consumer-centered climate of trust, mutual respect, and cooperation. However, the rewards for all your efforts and energy will be worth it as your community progresses from one where organizations are concerned about ensuring their survival to one where organizations work together to make the system better for older and disabled adults.

Resources

- Axner, Marya. Developing multisector collaborations. *The Community Toolbox*, http://ctb.ku.edu/tools/EN/sub_section_main_1385.htm
- . Promoting coordination, cooperative agreements, and collaborative agreements among agencies. *The Community Toolbox*, http://ctb.ku.edu/tools/EN/sub_section_main_1229.htm
- Barner, Robert. 2000. *Team Troubleshooter: How to Find and Fix Team Problems*. Palo Alto, Calif.: Davies-Black.
- Government of the District of Columbia, Office of Partnerships and Grants Development. Creating partnerships, http://www.opgd.dc.gov/info/part_coll.shtm (Includes resources on collaborative partnerships and evaluating and improving partnerships.)
- Johnson, Kathryn, Wynne Grossman, and Anne Cassidy, eds. 1996. *Collaborating to Improve Community Health: Workbook and Guide to Best Practices in Creating Healthier Communities and Populations*. New York: Jossey-Bass. (This is a workbook with tools designed to assist communities undertaking community-based health partnerships; it includes four case studies.)
- Kaye, Kenneth. 1994. *Workplace Wars and How to End Them: Turning Personal Conflicts Into Productive Teamwork*. New York: AMACOM.
- Levine, Stewart. Creating team agreement for results, http://www.teambuildinginc.com/article_creatingagreement.htm
- Liteman, Merianne, and Jeffrey Liteman. Turf battles: Retreats that work, <http://www.retreatsthatwork.com/article8.html>
- Pew Partnership. Collaborative leadership, <http://www.pew-partnership.org/collableadership/collableadership.html>
- Robbins, Harvey, and Michael Finley. 2000. *The New Why Teams Don't Work: What Goes Wrong and How to Make it Right*. San Francisco: Berrett-Koehler.

