[Year] Coalitions Lite Process Plan |[coalition name]

## Date Created date

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | Plan Authors | Name | |  | Name | |  | Name | | | Name  Name  Name |
|  | Name | Name |

# PROJECTED Timeline (from [Meeting #1 date] to [End date])

## **timeline details**

*Meeting 1 (Planning):* [insert Meeting #1 date]

*Meeting 2 (Identifying data needs):* [insert Meeting #2 planned date]

*Meeting 3 (Interpret data and finalize plan focus):* [insert Meeting #3 planned date]

*Meeting 4 (Review resources and identify data):* [insert Meeting #4 planned date]

*Meeting 5 (Finalize decisions & prepare Strategic Plan):* [insert Meeting #5 planned date]

*Strategic Plan completed:* [insert planned completion date]

*Final Strategic Plan approval:* [insert planned approval date]

*Meeting 6 (Approve & action plan):* [insert Meeting #6 planned date]

# progress

## **INTERIM AND FINAL approvals**

[Insert what you need to get approvals on and the process for any approvals needed; if intermediate approval will be needed from the larger coalition, stakeholders, or fiscal agents, for example, add those dates into your timeline. Who will need to approve the final Strategic Plan in step 6?]

## **sharing progress**

[Insert plan for sharing progress with the larger coalition and other stakeholders. Include specific method, timing, and person(s) responsible. Consider whether the updates should be incorporated into your timeline. The plan can be written out in narrative and/or you can use the table below.]

|  |  |  |
| --- | --- | --- |
| What shared/with whom | Person responsible | When shared |
| Action item 1 | Name | Date/location |
| Action item 2 | Name | Date/location |

## **monitoring progress**

[Insert strategies for monitoring progress and delays in assignment completion.]

## **celebrating progress**

[Insert strategies for acknowledging efforts, celebrating successes, and maintaining buy-in and commitment throughout the process.]

# meetings, roles, and expectations

## **meetings**

*Meeting format:* [online, in-person, hybrid]

*Meeting location or platform:*

*Policy and procedures for cancelling/rescheduling meetings:*

## **roles**

[Use the table below to summarize roles and tasks; this space can be used for notes or elaboration.]

|  |  |  |
| --- | --- | --- |
| Role | Person(s) Responsible | Details |
| Meeting planning and facilitation | Name | Insert |
| Meeting notetaker | Name | Insert |
| Meeting timekeeper | Name | Insert |
| Meeting follow-up | Name | Insert |
| Project management | Name | Insert |
| [Insert] | Name | Insert |

## **expectations of members**

*Expectations for meeting attendance:*

*Expectations for responses to communications:*

*Expectations for completion of assigned tasks:*

*Expectations for advanced notice when unable to attend meetings or participate:*