



# Partners In Health

ENGAGE

## Team Coordinator Manual



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## Introduction

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### Purpose of PIH Engage

Each year, malnutrition kills more than 3 million children worldwide. And every day, nearly 800 women die in childbirth. Needless, completely preventable deaths like these are driven by poverty and inequality. At Partners In Health, we believe that health is a human right, and we work to deliver high-quality health care to the poorest of the poor.

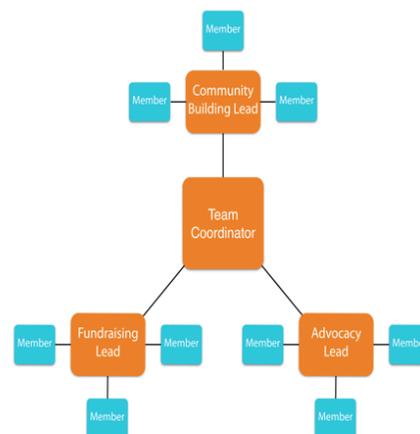
But the right to health—to not die in labor, to not die from starvation—will only be won through the work of a broad social movement of committed individuals. This is why we've built PIH Engage, a grassroots network of volunteer community organizers. Teams all over the country have committed to advocate for global health policy change, to educate the public about global health equity, and to generate unprecedented resources to support Partners In Health's lifesaving work.

### Shared Structure

In order to be more effective in achieving our goals, we employ a formalized *shared* leadership structure for PIH Engage teams. A leadership team offers a structured way to work together interdependently, recognizing and leveraging the unique talents of the individuals who make up the team. Team structures also help create strategic capacity—the ability to work creatively together in ways that produce more vibrant, engaging strategy than any individual could create alone. Leadership teams have clear missions and goals that all team members work towards through collaboration, creativity, and commitment. Leadership teams are also essential in providing a foundation from which an organization can expand its reach, as no one person can singlehandedly create an organization of massive scale.

Most importantly, your team structure must be *interdependent*. An interdependent leadership structure not only capitalizes on an individual's unique skill set and resources, but creates an environment of both support and accountability. Effective interdependent leadership takes the form of a “snowflake” as shown here:

Each team will have an Advocacy Lead, Community-Building Lead, and Fundraising Lead, in addition to a Team Coordinator who will oversee the other leads and the rest of the team members. Having four designated leaders will allow tasks to be divided easily and equally. Additionally, because each leader has a distinct role, the National Team in Boston will be able to provide specialized training to each of the different lead types through webinars and coaching calls.



## What is Your Role?

As the Team Coordinator, you are at the center of your team's structure—leading and enabling others to become leaders themselves. While it is imperative to build strong teams with autonomous and capable leaders, the responsibility for a successful campaign ultimately falls on you. You will be responsible for painting the vision of your local campaign, recruiting the leadership team necessary to execute that campaign, building a shared story and strategy around the campaign, and coaching and supporting the team all along the way. You will liaise with your leadership team, members, and the national team as shown below:

### Leadership Team

- Hold leadership team accountable for their commitments
- Establish a communication and feedback process within the leadership team
- Enable team to create and accomplish shared goals
  - Collaborate with each team lead to create specific and targeted goals
  - Check in on progress towards reaching goals; provide assistance as needed
- Assist team leads in developing their team and strategizing on division of workload
- Partner with leads on learning sessions as needed
- Utilize ladders of engagement to effectively build up strong teams

### Team Members

- Plan and execute routine meetings
  - Collaborate with leadership team to set agenda
  - Organize any relevant follow up steps; disseminate information to team
- Ensure team members are working towards campaign outcomes

### National Team

- Work with national team to plan and execute team vision and strategy
- Attend trainings, webinars, and coaching calls
- Promptly report on campaign progress via coaching calls, data collection and input, etc.

As Team Coordinator, you have a special responsibility to communicate with the National Team by promptly responding to emails and updating the staff with any information from events. Part of the power of working as a network is that teams can learn from and build off of what other teams have done and are doing, but this will only be possible if you communicate!

## Overview of Team Lead Roles

### **Advocacy Lead**

The Advocacy Lead will spearhead the team's efforts to contribute to policy change. They will become experts in understanding what PIH Engage means by advocacy, and will learn a breadth of advocacy tactics. Throughout the course of the year, the Advocacy Lead may oversee call-ins, meetings with members of Congress, birddogging efforts, and/or rallies. Accordingly, they will recruit a 3-5 member advocacy team to assist in these actions. The Advocacy Lead will also attend online training webinars led by the PIH Engage staff in Boston.

### **Fundraising Lead**

The Fundraising Lead will focus on securing new financial resources to fund Partners In Health's work. They will oversee all of their team's fundraising efforts, taking charge when necessary, but also delegating tasks as they see fit. Over the course of the year, the Fundraising Lead will spearhead their team's personal fundraising campaign, and also take charge of fundraising events, like Strides In Solidarity. The Fundraising Lead should recruit 3-5 fundraising team members to help plan and execute fundraising events and campaigns. The Fundraising Lead will also attend online training webinars led by the PIH Engage staff in Boston.

### **Community-Building Lead**

The Community-Building Lead will focus on building people power for their team. They will lead member recruitment, build relationships across the team, and develop a culture of honesty, activism, and deep commitment. To help with this, they will be responsible for leading their team through the PIH Engage global health curriculum using the provided readings and facilitation guide. They will interface with the community outside PIH Engage, inviting them to join the movement by attending events and leading discussions. The Community-Building Lead should also recruit a 3-5 member community-building team. They will learn the skills necessary to succeed in this role by attending training webinars hosted by the PIH Engage staff in Boston.

## What is leadership?

Later in this manual we are going to tell you the concrete *actions* you need to take as a Team Coordinator, but first we need to establish the framework of what it means to be a leader and organizer within PIH Engage. Let's define what leadership means for PIH Engage.

*Leadership is taking responsibility for enabling others to achieve shared purpose in the face of uncertainty.*

What do you notice about this particular definition? Let's break it down:

**"Taking responsibility."** Leadership is a choice – we make a decision to serve as a leader in this movement.

**"Enabling others."** Leadership isn't about ourselves, an egotistical venture, a line for our resume, a place to give orders. For PIH Engage to be successful, we need to practice enabling *others* to join us in leadership.

**"Shared purpose."** Leading your team in creating and naming your shared purpose will be a critical step early in your campaign. Movements and teams fall apart if members come with different purposes in mind. In the case of PIH Engage, commitment to empowering the social movement for health is the main shared purpose that will bond individuals and keep them on your team.

**"In the face of uncertainty."** The future of the movement for the right to health is by no means certain. Now, we have an opportunity to impact global health policy, reframe global health conversations with a rights-based perspective, and bring new resources to innovative delivery work. If we don't cultivate good leaders – if our teams fall apart, if we fall far short of our goals, if our strategies are ineffective – then we fail.

## What is organizing?

**Organizing is a form of leadership that enables a group of people to turn its resources into the power to make change.**

This transformative power is based on the recruitment, training, and development of leadership. In short, organizing is about equipping people (constituency) with the power (story and strategy) to make change (real outcomes).

Again, let's break this down a little further.

**“Organizing is a form of leadership.”** We've discussed our particular definition of leadership above. Remember, leadership is taking responsibility for enabling others to achieve shared purpose in the face of uncertainty.

**“That enables a group of people.”** The first question an organizer asks is not “what is my issue?” but “who are my people?” A constituency is a group of people who are “standing together” to assert their own goals. In the case of PIH Engage, our people can come from many places – our church group, our university, our book club, our sports team, or just someone we've known for a long time. Anyone from our networks, or who we believe might share our values, is our constituency.

**“To turn its resources.”** Whoever we may be, everyone in PIH Engage has access to some resources. These resources may be financial or close acquaintances with financial resources, or they may be the knowledge, funds, space, and environment a university has to offer. These resources may be extra free time, or access to a local newspaper happy to publish your article. The ability to influence Congressmen is also a resource – all citizens of the United States have the ability to share their voice with members of Congress.

**“Into the power.”** Dr. Martin Luther King Jr. described power as the “ability to achieve purpose.” Our power comes from people—in PIH Engage, we desire change, and we can organize our resources into the power needed to create change. Organizing is not only a commitment to identify more leaders. It is also a commitment to engage those leaders in a particular type of fight, building the power to create the change we need in the world. Organizing power begins with the commitment of the first person who wants to make it happen—YOU. Without this commitment, there are no resources with which to begin. Commitment is as observable as action. The work of organizers, of you all, begins with your acceptance of the responsibility to challenge others to do the same.

**“To make change.”** Change is specific, concrete, and significant. It is not about “creating awareness,” having a meaningful conversation, or giving a great speech. It is about specifying a clearly measurable goal and explaining why achieving that goal can move you forward in meeting the challenge that your constituency has to face. It is about identifying how each of our campaign “peaks” contributes to our ultimate goal of advancing the right to health.



## Why is Your Role Important?

From the definition above, we know the ultimate goal of organizing is to make a change. This cannot happen without you. The foundational building blocks of a social movement are people. A social movement requires leaders who will recruit committed individuals, enabling and supporting those individuals to become leaders in their own capacity. This is where you come in.

Social movements must also be strategic and coordinated. You will work at various levels, spanning from the National Team to your individual team leads to create strategic vision, facilitate, and implement the yearlong campaign. Your guidance and leadership is essential to the overall outcomes and success of your team. By coordinating our efforts across our network, we can leverage individual outcomes to create massive power leading to change.

## Resources for Your Success

It is critical to remember that you are not alone in this work! You are part of a large network of advocates around the country fighting for health equity, and we have years of experience that we want to share to help you continue this work.

To access team materials, webinars, slides from Training Institute, and information about past fundraising events, go to [engage.pih.org](http://engage.pih.org) and click on the Resources tab. You can access these resources at any time during the year, and you should direct team members to our website so that they can use these tools as well.

Throughout the year, the National Team will also hold webinars and other training sessions that are critical to our campaign, so please keep up to date on emails and RSVP to those events as necessary. Our data shows that teams in regular contact with the National Team through these means are significantly more successful in achieving their fundraising and advocacy goals throughout the year.

As always, if you have any questions or want to check in, your National Team Coach is always available and wants to work with you! That's what we're here for!

## How to Lead Your Team

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### Shared Commitment

#### What are relationships?

*Relationships are the foundation of an organized movement for change.*

**Relationships are rooted in shared values.**

The strongest and most authentic relationships occur when people find shared values among themselves. We can identify values that we share by learning each other's stories and finding common threads between each of our stories.

**Relationships grow out of exchanges of interests and resources.**

We each have interests and resources that are diverse and largely dependent on our life experiences. In an ideal world, each of our interests would be directly matched with our resources; however, this is not the case. Thus, our relationships must function off of sharing our own resources in order to fulfill others' interests and being willing to have our own interests fulfilled by others' resources.

**Relationships are created through commitment.**

An exchange becomes a relationship only when each party involved commits its time, energy, and resources. By committing to the team, a future is established as each party must decide how to best use the resources.

**Relationships involve constant attention and work.**

Relationships must be nurtured over time and will inevitably change as people change, situations arise, and interests develop. Through attention and work, relationships not only evolve for the better, but they also promote continual learning and development for the team.

## Why are relationships important?

Relationships allow team members to commit not only to the purpose of the team but also to the team itself. Whether team members are feeling overwhelmed in the face of obstacles or celebrating after accomplishing a goal, their commitment to each other will hold the team together throughout its work. Relationships are the glue that will hold PIH Engage together, and it is critical to build meaningful relationships early on in order to reach optimal success.

### **Building leaders through relationships**

We must identify, recruit, and develop other leaders. We build relationships with potential collaborators to explore values, learn about resources, discern common purpose, and find others with whom leadership responsibility can be shared.

### **Building communities through relationships**

Leaders, in turn, continually reach out to others and form relationships with them. They expand the circle of support, grow more resources, and recruit people who, in turn, can become leaders themselves.

### **Building power through relationships**

Relationships, interests, ideas, and resources -- all of which are shared -- can combine to create new ideas and real change. True power is built when each team member contributes fully, with the team and its purpose in mind.

You will work closely with your Community-Building lead to ensure that relationships are formed among your team members. As the leader of the Leadership Team, you have the responsibility to ensure that these relationships are also furthered among the leads—meetings and retreats are great times to help leads and members bond.

## Overview of Recruitment

Successful recruitment relies on the power of relationships. You will utilize a series of tactics to identify and engage interested members of your networks. These tactics include one-on-one meetings, house meetings, info sessions, and social events. It is essential that with each of these tactics you focus on relationship building. Your recruitment strategy will depend on the context of your environment but below is a general recruitment timeline you should follow.

If you are an existing team, you should first meet with your leadership team and work closely with your Community-Building Lead to develop and implement a specific recruitment strategy.

1. Think about your networks—friends, classmates, teammates, members of other clubs, fellow churchgoers, coworkers, etc.—and brainstorm potential people who you think would be interested in PIH Engage. Also think about the skills and resources each individual would bring to the table.
2. Hold one-on-one meetings with the people from the list you made. (See the one-on-one meetings guide below.)
3. From your one-on-one meetings identify individuals that would be a good fit for different leadership or member roles. Make the ask. A solid and committed team will lay the foundation for a successful year—be thoughtful and intentional about who you ask to join your team, especially in lead roles.
4. With the help of your leadership team, continue to conduct one-on-ones to build a solid team.
5. Host a house meeting, info session, and/or social event to cast a wide net and draw a bigger group of people at once. (See house meeting guide below.)
6. Make sure you and your leadership team are following up and engaging with the people you have had one-on-ones with or who have attended a house meeting/info session. Build the relationship by connecting an “ask” to each interaction—attend a team meeting, event, or campaign action.
7. Encourage all members to continue to do personal recruitment throughout the year.

## Guide to House Meetings and Info Sessions

*House meetings build community and commitment around a leadership team.*

House meetings are informal gatherings that can be held at the beginning of the year during your recruitment push. These meetings are unique from general team meetings in that they help us identify and test leaders while simultaneously recruiting new team members to build our snowflake team structure. They can be held anywhere, including your house or apartment, restaurants, or other public meeting space.

*Info sessions introduce PIH Engage to a larger audience in hopes of inspiring commitment.*

Info sessions are similar to house meetings, but are typically employed in recruitment on college campuses. These meetings are usually held after a recruitment or activities fair in a public space on campus.

### Planning your house meeting or info session:

1. **Set goals** – Think about how many people you want to attend, and then multiply this number by four. Invite that number of people, expecting only a fourth will show up.
2. **Put your event on [engage.pih.org](http://engage.pih.org)** – Registering your event on our website will not only give potential attendees all the information they need, but will give you all their contact info when they register. This will make it much easier for you to follow up. Here's the link to post event on our site: [http://pihengage.nationbuilder.com/users/event\\_pages/new?parent\\_id=6](http://pihengage.nationbuilder.com/users/event_pages/new?parent_id=6)
3. **Recruit attendees** – This is where the hard work comes in. No one will show up to your meeting unless you put in the effort to recruit them. While social media and email are important tools to use, it is imperative that you and your leadership team also utilize individualized recruitment in the form of in-person conversations, phone calls, text messages, etc.  
On school campuses, make sure you participate in your school's activities fair – here you can gain a large number of sign-ups in a short period of time. (Don't forget to follow-up with all of them!) You can also post or hand out flyers in "high traffic" areas, but in our experience, this will recruit one attendee at most. And remember, invite as many people as possible—less than half of them will actually come!
4. **Reminder calls or emails** – Make sure to follow up with invitees—which includes registered attendees, those that have expressed interest, and those that have not yet responded. Getting firm commitments will dramatically increase the likelihood that someone will come to your meeting. As often as possible do this in-person or through a very personal text/email.
5. **Prepare your materials** – Print out any materials that you will need for the meetings. Useful documents include sign-in sheets and informational flyers on how to get more involved. If you plan on using them, make sure to have any slides, videos, etc. prepared.

### Sample Agenda:

1. **Welcome and Thanks (5 min)** – Bring everyone together to welcome and thank them for coming.
2. **Story of Self (5 min)** – Why did you take on leadership with PIH Engage? What experiences led you to decide to take this responsibility? Why do you need others' support?
3. **Group Introductions (5-10 min)** – Depending on the size of the group, have everyone introduce themselves, and if time allows, share why they want to get involved and what inspired them to come to the meeting.
4. **Presentation of Info (15-20 min)** – Give a brief presentation on the work of PIH Engage—feel free to use any slides, videos clips, etc. that may help you. Share what your specific team wants to accomplish (even a set of initial ideas if you haven't had a Kickoff Retreat yet) and convey a sense of urgency – we need their help NOW!  
On school campuses, you should expect that many attendees will have little to no knowledge about PIH and our mission. Consider extending this section and adjusting your agenda accordingly.
5. **Group Discussion (10-15 min)** – Discuss as a group why this work matters. What are people excited about? How can they contribute?
6. **Close (5 min)** – Make a hard ask. Be prepared with an upcoming team meeting, event, or other way to continue your relationship, and ask for firm commitments. Thank everyone for coming and if you haven't done so, make sure to capture all attendees' contact info.

### Follow up:

Remember to follow up, via phone or email, with all attendees the NEXT day. Thank them for attending and remind them about the commitment (e.g. attending next meeting) they made. This step is absolutely crucial to building the relationship. Be sure to log sign-in information and keep track of how attendees continue to take action (or don't – and that's ok as long as you've given them opportunity to!) throughout the campaign year.

### Social Events:

Social events (many PIH Engage teams term these “Social for Justice”) are a good follow-up option to a house meeting or info session to continue to engage with potential team members and build those relationships. Make sure you interact with all attendees. Talk with people individually, filling in any knowledge gaps as necessary and making targeted asks.

## Guide to One-on-One Meetings

*1:1 interactions are the best way to establish relational commitments.*

Recruitment 1:1s are individual conversations you have with a potential team member—think of them like a date! The goal is to connect with someone and lay the foundation for your relationship. For some of us, this kind of recruitment and interaction isn't part of our everyday routine, or the way we would initially think to recruit team members. However, organizers across issues have seen this be successful time and again. Take some time to invite potential team members for a quick half hour chat after work, during your lunch break, or for coffee or drinks this Saturday. See the 1:1 meeting workshop guide from the Training Institute to train your team on how to conduct 1:1 meetings.

**A 1:1 meeting consists of five “acts”:**

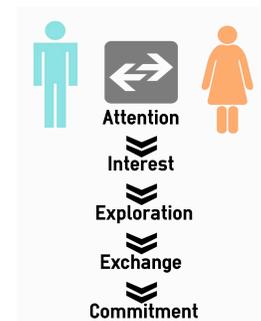
**1. Attention** – We have to get another person’s attention to conduct a one-on-one meeting. Don’t be “coy.” Be as up front as you can be about the fact that you want to talk to them more about PIH Engage, but that first, you’d like to take a few moments to get acquainted.

**2. Interest** – There must be a purpose or a goal in setting up a one-on-one meeting. In the case of recruitment, the purpose of the meeting might be to answer any questions about PIH Engage or global health advocacy or formalize commitment to the team.

**3. Exploration** – Most of the 1:1 is devoted to exploration by asking probing questions to learn the other person’s values, interests, and resources and by sharing your own. In recruitment 1:1s, you should share your personal story about why you got involved in Engage and ask them about why they are interested in the team.

**4. Exchange** – We exchange resources such as information, support, and insight. This creates the foundation for future exchanges. For Engage, you could give insight into how they might want to be involved or offer to connect them to other team members.

**5. Commitment** – A successful 1:1 meeting ends with a commitment, most likely to meet again. By scheduling a specific time for this meeting, you make it a real commitment. The goal of the 1:1 is not necessarily to get someone to commit to the team, but to commit to *continuing the relationship*.



**Best Practices:**

- Keep your meeting at **30-45 minutes**, no longer than an hour
- Share your personal story; connect with the individual on **shared values and experience**
- **Listen** twice as much as you talk
- Always end with a **hard ask** and **clear next steps**

*In addition to recruitment 1:1s, “maintenance” 1:1s are used to check in with current members about their involvement, and “escalation” 1:1s are helpful to confirm members into new roles or responsibilities. These 1:1s should be tailored to the specific commitment that the member has made, is interested in making, or that you want them to make.*

## Shared Story

Organizing is rooted in shared values expressed as public narrative. Shared stories represent the collective dedication and action of each individual member and the team as a whole.

### What is Public Narrative?

Public narrative is how we communicate our values through stories, bringing alive the motivation that is a necessary pre-condition for changing the world. Through public narrative, we tell three different stories:

*A “Story of Self” communicates the values that called you to lead in this way, in this place, at this time.*

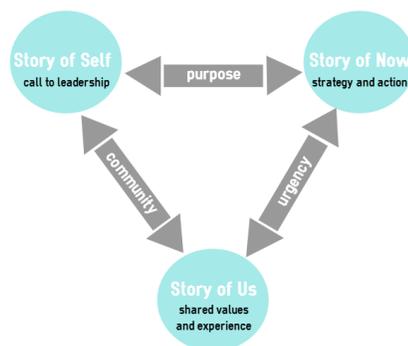
Each of us has compelling stories to tell. In some cases, our values have been shaped by choices others – parents, friends, teachers – have made. We have chosen how to deal with loss, even as we have found access to hope. Our choices have shaped our own life path: we dealt with challenges as children, found our way to a calling, responded to needs, demands, and gifts of others; confronted leadership challenges in places of worship, schools, communities and work.

*A “Story of Us” communicates shared values that anchor your community, values that may be at risk, and may also be sources of hope.*

You tell a story of self to enable others to “get you” – to experience the values that call you to public life. You tell a “story of us” to enable them to “get each other”- to experience the values they share that can inspire them to act together, find courage in each other, and find hope in their solidarity. In other words, the “us” that the storyteller brings to life is based less on what “category” describes them (race, gender, language, etc.) than on values they share rooted in common experience. By learning to tell a story of us you can bring those values alive as a source of solidarity, hope, and the motivation to act.

*A “Story of Now” communicates an urgent challenge you are calling on your community to join you in acting on now.*

The Story of Now focuses on a challenge to your community demanding action now, a source of hope, and the choice of a pathway to action you call on others to join you in taking.

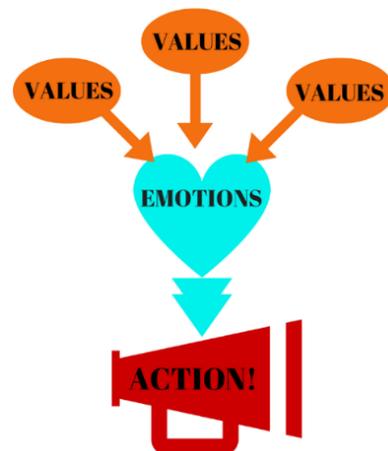


## Why Use Public Narrative?

Basically, *because it will make you a much stronger team.*

*Public narrative translates VALUES into ACTION.*

Public leadership requires the use of both the “head” and the “heart” to mobilize others to act effectively on behalf of shared values. Leadership engages people to interpret WHY they should change the world and HOW they can act to change it. Why leaders work to change their world is their motivation, their driving force, and how they work to change their world is their strategy, how they approach their particular dilemma. Public narrative is the “why” – the art of translating values into action through stories and that is where we will spend our time and energy.



*The key to motivation is understanding that values inspire action through emotion.*

Emotions inform us of what we value in ourselves, in others, and in the world. Emotions can also act as a conduit to allow us to express the motivational content of our values to others. Stories draw on our emotions and show our values in action, helping us *feel* what matters, rather than just thinking about or telling others what matters. Because stories allow us to express our values not as abstract principles, but as lived experiences, they have the power to move others to action.

*Some emotions inhibit mindful action, but other emotions facilitate action.*

The language of emotion is the language of movement, sharing the same root word. Mindful action is inhibited by inertia, self-doubt, fear, isolation and apathy. On the other hand, action can be facilitated by YCMAD (you can make a difference), solidarity, anger, urgency, hope. By being mindful of our thoughts and emotions, we can learn to control them to become effective leaders. Stories can mobilize emotions, enabling mindful action to overcome emotions that inhibit it.

Public narrative is an integral technique you will use throughout the campaign year. It will support your recruitment efforts, personal fundraising, and advocacy. You all practiced this at the Training Institute – now you must elicit a “Story of Self” from all your team members and construct together a “Story of Us and Now.” See the **Public Narrative Guide** on NationBuilder on how to facilitate a public narrative workshop with your team.

## Shared Strategy

### What is shared strategy?

With a social movement or campaign, leaders strategically develop a framework: campaign events, actions, and measurable benchmarks that local leaders can tailor to their own communities. Local leadership can then build their communities, groups of people who have or find shared interest with each other. These groups of people vocalize their own community's needs and interests and strategize with campaign leadership about how best to shape and reach campaign-wide goals in their communities. Local leaders and campaign leaders are then able to mold a shared and more powerful, actionable strategy.

### Why do we need a shared strategy?

*Strategy is how to turn what you have into what you need to get what you want – how to turn resources into power.*

If we think of power as the influence one actor can exercise over another because of an imbalance in interests and resources, one way to correct the imbalance is to aggregate more resources. However, strong organizers can translate a limited amount of resources into enormous results in order to meet their goals. Power is, put simply, a matter of resources and resourcefulness. Because organizers try to create change, they often have to rely on resourcefulness to compensate for a lack of access to resources. Your strategy must be your plan for *how* you'll turn resources into results, and thereby meet the goals you'll set with your team during the **Kick-Off Retreat**. See the **Kick-Off Retreat Guide** to plan and host a retreat with your team.



## Setting Goals

We can't have shared strategy without setting goals. Without goals, your team will have no sense of what defines a successful campaign, and won't be able to design a strategy to achieve success. Your goals should be SMART—specific, measurable, attainable, relevant, and timely. Of course, don't forget to also set *ambitious* goals.

## Why Do We Set Goals?

Goal setting lays down the foundation for the year, creating shared purpose and commitment that will drive your campaign forward. Without this vision, it's very difficult to plan far enough ahead and to craft a truly cohesive campaign where each piece contributes to your broader purpose and goals. Setting a goal as a group will provide you and your team with a standard to which you can hold yourselves accountable and measure your progress. It gives your team something to strive for, and will help group members better understand the scope and scale of what you are trying to accomplish. A good goal will also push team members to remain motivated throughout your campaign. With a specific goal set, members of your team can hold each other accountable for continuing to work on the campaign until you reach (or surpass!) your goal. Additionally, setting a clear goal will push your team to define specific, small steps to reaching that goal, allowing you to be more organized and efficient.

## Setting Expectations and Responsibilities

Early on in the year (at the Kick-Off Retreat!) it is important that you set team expectations as well as assign responsibilities. As a team think about what you expect of one another and how you will hold each other accountable. Some questions to think about are: What are the expectations for attending team meetings? How will you communicate with each other? How will everyone (in their individual "committees") work together to achieve campaign outcomes?

If you have not formally assigned team lead roles, this should be done at the Kick-Off Retreat. As a team you should also start to think about what role each team member will play in the different campaign events throughout the year. See the **Kick-Off Retreat Guide** for an activity on setting expectations and responsibilities.

## Maintaining Shared Commitment

### Grounding Team in Shared Purpose

The first step to maintaining shared commitment among your team is to constantly ground them in the shared purpose you all have rallied around. This means making sure your team goals relate to the shared purpose and incorporating shared purpose into all meetings, events, and actions of your team. You can facilitate this by providing constant updates to the work of PIH and PIH Engage, conducting workshops on public narrative, and bringing in outside speakers that reflect this shared purpose. When talking through logistics and plans for your next event, remind your team why you're doing this work and how it relates to the bigger picture. By keeping your team's shared purpose at the forefront of your work, team members will feel involved throughout the process and understand the importance of their role.

### Managing Team Goals

The compliment to shared commitment is shared success. When many people have an opportunity to contribute to the effort, they also share in its success. It is their victory, not someone else's victory. This, in turn, creates motivation and a sense of entitlement that facilitates **accountability** to the collectively set goals and tasks.

In order to remain accountable, achieving team goals, you must manage these goals throughout the year. Accountability starts with you, therefore, you should lead by example, following through on your commitments. If you say you'll finish a certain task by a certain day – do it. It is also important to work with your leadership team to instill a culture of accountability—support them to be accountable themselves as well as strategize how they can then support their team members. Help them to come up with individual work plans, defining their workload as well as where they will get support from team members. It's also important to create check-in processes and feedback loops. Find what works best for you, but a great tool is Google spreadsheets. You can create a shared document with everyone's tasks and deadlines associated with them, and ask people to write in them when once they finish a task. That way, everyone knows the group progress and is accountable to their tasks.

### Facilitating Effective Team Meetings

In order to achieve your goals as a team, it is extremely important that you have regular team meetings. There are three main steps necessary for an effective meeting: 1) Preparation, 2) Host, and 3) Follow-up. For more information on facilitating effective team meetings, review the guide on the PIH Engage website.

1. **Preparation:** Well before the scheduled meeting, you should start preparing and organizing for the meeting. This includes inviting attendees, establishing the goals, audience, and location of the meeting, and recruiting help from other team members. You should also

develop a clear agenda to ensure that the meeting runs smoothly and on-time. Agendas will be different based on the type of meeting, but they should always include about five minutes of welcome and introduction and ten minutes for reviewing next steps and wrapping up.

Before the event, confirm attendees with a personal email or call to ensure that they will come to the meeting. No one wants to take time to attend something where they don't feel people care if they attend or not, so show enthusiasm for the meeting and follow up with those who don't respond to your invite.

- 2. Host:** During the meeting, try to stick to your planned agenda as much as possible and make sure to discuss key goals and topics. Put out sign-in sheets so you know who attended and have someone take notes to send to attendees.
- 3. Follow-Up:** A successful meeting is not completed until after you follow-up with attendees to ensure that they received the most important information. Review the sign in sheet and follow up by email thanking everyone for attending, sending around notes from the meeting, and confirming any tasks that attendees took on. Be sure to note the date of the next meeting, even if it is tentative, so that attendees can plan to attend.

## Fostering Shared Commitment

You are a leader, not a boss. This means you are very much an active team member. Remember back to our definition of leadership: *taking responsibility for enabling others to achieve shared purpose in the face of uncertainty*. It should be your goal to cultivate leaders in your team, inspiring them to stay committed. An individual's commitment to the team should evolve and strengthen over time. It is difficult and dangerous to make a major ask of a new member. Instead, we need to make a series of escalating asks that capitalize on an individual's initiative, interests, and skills. This concept is explained further in the next section: Guide to Ladders of Engagement.

## Guide to Ladders of Engagement

### What is a Ladder of Engagement?

Recruiting members and establishing relationships are just the first steps in building up a strong team. It is essential that these relationships continue to grow, enabling individuals to grow as leaders. A ladder of engagement offers a visual representation for this approach, with each rung representing a more progressive action leading to a higher level of engagement. The ladder of engagement is not just a recruiting tool. You and your leadership team should be using this concept for each campaign that takes place throughout the year. It will allow you to see who is expressing interest and showing initiative with respect to the work of the three team leads (Fundraising, Advocacy, and Community Building) and thus incorporate them into the work of those campaigns. And, it will allow you to provide a wide range of ways people can get involved with your PIH Engage team – they can choose which actions matches their level of commitment at that moment in time.



### How to use the PIH Engage Ladder of Engagement

The ladder of engagement offers you a powerful technique in building a strong team. It allows you to identify individuals who are taking initiative and that are willing to commit to a greater level of responsibility. By tracking members through the ladder of engagement you can make tailored “asks,” helping that individual to grow as a leader as well as build the overall team capacity. Below is an example of the ladder of engagement in practice:

- Level 0: individual signs up on the PIH Engage website
- Level 1: individual attends a one-on-one with leadership team member
- Level 2: individual attends team events/fundraisers/etc.
- Level 3: individual is an active member of the team, contributing to planning, and executing team events/fundraisers/etc.
- Level 4: individual is a leadership prospect

## Management Best Practices (Time, Delegation and Feedback)

To be a successful TC or lead, you must be able to manage your team members as well as your work. In some cases, management can be even more difficult than concrete tasks because it requires creating space for members to act autonomously toward a shared goal. Management best practices include three factors: Time, Delegation, and Feedback.

### Time

Ensure that every new project you take on has a clear deadline and timeline for progress reports. This will ensure that tasks get completed and fit into the workflow of the team. Be sure to set deadlines that are practical alongside other team work – ensure that team members can realistically complete the given task on time.

### Delegation

Once a deadline is set, think about who would do the task well (and who actually has time to complete the task). You should use the ladders of engagement visual to identify individuals who could complete the assignment. Who has experience and skills? Who needs to learn how to handle this responsibility? Who would like this opportunity? You must delegate the task to the correct person and provide the necessary training and guidance to complete the job.

### Feedback

Do not just leave a team member alone to complete a project. Provide feedback at every level, from monitoring work and coaching at agreed-upon progress report points to identifying lessons and evaluating performance after the deadline. Giving helpful and positive tips about what went well and what the team member could work on will encourage them to take on other leadership opportunities with the team.

## The Power of a Network

You are part of a network of hundreds of supporters making up teams all around the country! We all bring unique experiences, skills, and resources to the table—our *collective* power is massive. We have already seen the great impact that our network can have—raising 100,000s of dollars, educating our local communities, and influencing key decision-makers. Our success starts and ends with you. By coordinating individual efforts across the country, we have the capacity to make a change together.

### Communicating with the National Team

Our power as a network is only as strong as our coordination. Therefore, it is essential you stay engaged with the National Team:

- **Coaching Calls** – You will schedule a regular call with your National Team coach. Make sure to answer the phone and be prepared for the calls. If you need to miss your call, provide your coach with ample notice (at least 24 hours), and make up the call within a week.
- **Read emails and take ACTION** – You will receive individualized emails from your coach as well as network-wide emails. Provide prompt responses and take any actions identified in the email. Report back on those actions.
- **Attend webinars** – Webinars are not only a valuable training experience, but also an opportunity to engage with teams all across the country. They provide space for key updates and trainings on our campaigns and should have at least one attendee from every team.
- **Always check in** – Your coaches are here to support you! Feel free to reach out to them with any questions or concerns as they arise.
- **Be honest!** – In order to best support you, we need you to be honest with us. This work is hard—we are here to help no matter what barriers or roadblocks you face. There isn't just one measure of success. The simple decision that you have made—the decision to stand up and fight injustice—is a success in itself.

## Representing PIH in Public

### How to Represent PIH as a Member of a PIH Engage Team

As a member of PIH Engage, you are an ambassador for both PIH Engage and PIH as an organization. With that role, there are certain rules and regulations that you must follow. Below are a series of policies about social media and legal practices. Some major tips for representing PIH in public include:

1. **Act professionally:** It is important that all team members act professionally at all times by acting respectfully and politely with other team members and outside groups. This is especially important when your team meets with members of the legislature or their staff; your impression will not only affect your team's success, but it will also influence how they view other PIH Engage teams in your area and PIH as an organization. Please always be well prepared and ready to discuss your team's connection to PIH in meetings.
2. **Do not use PIH logo without advanced permission:** PIH has a branded logo, and you must comply with its registered trademarks. The name "Partners In Health," "PIH," and the PIH logo may not be posted on the Internet or published anywhere without PIH's advance approval.
3. **Always represent yourself as affiliated with PIH Engage (not PIH) and as a volunteer:** As a member of a PIH Engage team, you are a part of the mission of PIH and our goal of community activism to create policy change, but you do not work for PIH. Be sure to represent yourself on social media as a volunteer through PIH Engage so that you do not confuse outsiders about your role. This is especially important in Facebook and LinkedIn profiles and Twitter handles, as well as sign-offs on op-eds, LTEs, and emails.
4. **Your team cannot support a political candidate or party:** As a 501(c)(3) non-profit, PIH is barred from supporting candidates or political parties. This is especially important during election years. We do not discourage you from supporting candidates as an individual, but make sure that this support does not link to PIH Engage or PIH. Publicly supporting a candidate includes showing the PIH or PIH Engage logo at any political rallies or events for a specific candidate or affiliating PIH or PIH Engage with support of a specific candidate orally or via a written statement or social media.
5. **Do not create a PIH Engage team Facebook page or Twitter:** The Communications team at PIH handles all of the pages and external communication from PIH, and they want all information about PIH on social media to come from these pages. Because of that, your PIH Engage team cannot create an individual Facebook page or Twitter account. Instead, you can use hashtags or post photos on your individual account to support your Engage team. You can also create a Facebook group to communicate with your team—just keep it as a group rather than a page.

### PIH Social Media Policy: Adapted for PIH Engage

Social media, such as blogging, Facebook, and Twitter, offer important ways to interact and share content online. When used to communicate information and ideas that are appropriate to share with others in a public forum, a blog or a social media profile can be an important and powerful tool.

However, please keep in mind that information published on the internet is open to the public, and once it is published, it is impossible to predict or control who will see what is written, how the statements or images posted will be construed, and how and with whom the information may be further disseminated. Google, Yahoo, and other search engines make it extremely easy for people other than the intended audience to find and search blogs, social media profiles, and other Internet postings. It is in this context that PIH has established a policy aimed to guide volunteers and employees about the appropriate use of social media as it relates to PIH. This policy applies whenever any PIH volunteer posts anything on any form of social media that relates to PIH.

Every Internet posting by a PIH volunteer or employee, and every blog maintained by a PIH volunteer or employee, needs to comply with PIH's policies regarding confidentiality of information.

PIH also requires that volunteers respect PIH's rights to its registered trademarks, including Partners In Health, PIH and the PIH logo as well as to PIH's other intellectual property. Such information may not be posted on the Internet or published anywhere else without PIH's advance approval.

Please remember that each and every PIH volunteer is an ambassador for Partners In Health, for our partner organizations, and for our joint work. As such, it is essential to respect these basic guidelines:

**Password-protect or change your privacy settings (Facebook):** Ensure that the information cannot be viewed by the general public.

**Think before you type:** Before posting, imagine how you, your friends, your family, your coworkers, and those to whom you provide services at PIH would feel if the entry ends up being read not only by close friends, but by people you would least like to see it. A little self-censorship can spare a lot of embarrassment... or worse. If you have ideas or impressions you would like to share only with your nearest and dearest, email is a lot safer and wiser.

**Use good judgment:** Remember that there are always consequences to what you write. If you're considering posting something that makes you even the slightest bit uncomfortable, or that you think a posting might possibly make someone else uncomfortable, think very carefully before posting it.

**Use a disclaimer:** Make it clear when posting your blog or on another person's blog that what you say on the Internet is representative of your views and opinions only and not necessarily the views and opinions of PIH. At a minimum, you must include the following standard legal disclaimer on your blog site: "The postings on this site are my own and don't necessarily represent PIH's positions or opinions."

**Connect to PIH:** If you are on Facebook, become a fan. If you are on Twitter, follow us. Linking yourself to our organization allows you to stay updated with PIH's presence in social media.

**Ask questions:** If you have any questions or doubts about anything you are thinking of posting on the Internet, or if you have any questions about this policy, please discuss the issue with the National Staff.



## Thank you!!

When you made the choice to become a PIH Engage Team Coordinator, you may not have known exactly what lay ahead. To be honest – we don't either. But by working together, by building this movement, by committing our time and energy to work in solidarity with those in need, we can achieve significant change in the world. To do this, we need leadership, and you've stepped up.

Remember:

*Leadership is taking responsibility for enabling others to achieve shared purpose in the face of uncertainty.*

We're not certain what the future of PIH Engage holds because the power we build together this year will determine that. We're confident that you will create the shared commitment, story, structure, strategy, and action necessary to build an effective team. You are a social justice warrior – a leader and an organizer!

We're so lucky to work alongside you.

In solidarity,

The PIH Engage National Team