

## **Lead Agency / Fiscal Agent**

Responsibilities: The fiscal agent is responsible for the financial oversight of the coalition.

Characteristics:

- Strong links to local community
- Respect of community organizations, key leaders and residents
- Deep understanding of community health issues and local politics
- Belief in collaboration, patience and confidence to “trust the process” of community engagement and shared decision-making
- Ability to serve as the private, not for profit legal entity for the coalition
- Sufficient infrastructure and resources to provide basic administrative needs of the coalition
- Ability to hire and supervise staff to support coalition

Duties may include, but are not limited to:

- Monitor grants on behalf of the coalition
- Fulfill financial obligations on behalf of the coalition
- Develop an annual budget in collaboration with the coalition, and with coalition approval
- Manage spending within the approved budget
- Communicate how money is spent to finance committee (if applicable), which reports to the coalition membership
- Participate in the finance committee (if applicable)
- Allocate resources with guidance from the coalition
- Provide legal oversight of coalition funds
- Complete fiscal reports to funders on behalf of the coalition
- Hire staff to support the coalition in achieve its outcomes
- Jointly supervise coalition staff (when appropriate)
- Provide space for coalition and its staff

**Coalition Staff / Coordinator:**

Responsibilities: Coalition staff / coordinator is responsible for assisting the coalition to oversee and manage its operations, including: coalition meetings and communication; community engagement; strategic plan development, implementation and evaluation. Reports to lead agency *and* coalition leadership.

Duties may include, but are not limited to:

- Assist the coalition in assessment, planning, implementation and evaluation activities
- Work as a team member with lead agency and coalition to meet project goals and objectives
- Assist coalition leadership in developing coalition meeting schedules and agendas
- Assist coalition leadership in recording minutes of coalition / committee meetings and ensure timely distribution to coalition membership
- Assist in facilitating the organization of committee meetings
- Keep coalition and committees focused on activities that will meet projected outcomes
- Facilitate the organization of coalition events
- Assist with developing relationships with residents, stakeholders and other community members
- Assist coalition leaders in assessing training/technical assistance needs of the coalition, and in organizing training opportunities
- Act as a subject matter expert for the coalition
- Assist in recruiting new coalition members
- Document coalition activities and progress toward outcomes in reports to lead agency, funders, coalition members, and broader community (where appropriate)

**Coalition Leader: Chairperson / President**

*Responsibilities:* Coalition chairperson is responsible for assisting in the oversight and management of coalition operations, including: coalition meetings and communication; community engagement; fiscal decision-making; strategic plan development, implementation and evaluation.

*Duties may include, but are not limited to:*

- Participate in assessment, planning, implementation and evaluation activities
- Work as a team member with lead agency and coalition staff to keep coalition on track to meet project goals and objectives
- Keep coalition and committees focused on activities that will meet projected outcomes
- Consult with staff to develop agendas for coalition meetings
- Facilitate / chair coalition meetings
- Act as liaison between the coalition and its committees/work groups
- Contact members and coordinate committee responsibilities with them
- Assist in supervising and management of coalition staff in collaboration with leadership team/lead agency
- Represent the coalition in the community (with staff assistance)
- Deal with members fairly, sensitively and confidentially
- Promote collaboration, communication, shared decision making and conflict resolution
- Remain open to diverse points of view and differences of opinion
- Consult with coalition staff as needed

## **Coalition Member**

*Responsibilities:* Coalition members are responsible for the oversight and management of the coalition including but not limited to community engagement, fiscal decision-making, strategy development and implementation.

*Duties may include but are not limited to:*

- Participate in planning and setting priorities
- Participate in defining the role of the coalition in the community
- Participate in leadership of the coalition
- Participate in evaluating the contribution the coalition makes to related outcomes
- Connect coalition to the larger community
- Recruit new members
- Participate in coalition events and activities
- Represent the coalition within one's sphere of personal influence
- Participate in setting the budget for the coalition
- Participate in decision about allocation of resources for the work of the coalition
- Give input for supervision and management of staff assigned to the coalition
- Attend coalition meetings and participate in at least one committee / work group (depending on membership level)