

# Leadership Meeting Toolkit

## How to Use Toolkit

This toolkit is designed to serve as a suggested outline for a leadership meeting between community partners. Each section includes agenda topics and bulleted sample talking points. **Remember, this guide is a starting point.** Feel free to customize each section to best suit your current relationship and the goals for the meeting.

### Why Should You Build a Relationship?

We are better together! Community partners often serve the same individuals and share the same public health goals; however, their efforts are not always coordinated. By developing a strong relationship, the work can be aligned to create a larger impact in the lives of the families they serve.

## Let's Get Started

Get started with an invite! Identify partner organizations you'd like to connect with and extend an invite. While the ideal meeting would be in-person, schedules can be busy and a phone call may be an option that works best for everyone. Prepare for the meeting by considering the following:

- Who do you want to invite to the meeting?
- What is your current relationship with them?
- What is your goal of the meeting?
- What would you like to learn from each of the partners?
- What can you provide to your partners?
- What are the specific next steps you'd like to see as an outcome of this meeting?
- Would you like to meet regularly?

## Sample Meeting Agenda

- **Welcome and Introductions**
  - What is your name and title?
  - What excites you most about this meeting?

- What are you hoping to achieve from this meeting?
- **Getting to Know You**
  - Goals, successes & challenges
  - How can we better work together?
- **Communication and Referrals**
  - Current status
  - Interest in collaboration and changes
  - Outcomes / next steps from discussion
- **Relationship-Building Activities**
  - Identify collaborative activities
- **Keep the Momentum Going**
  - Frequency of meeting
  - Key takeaways
- **Next Steps**
  - Who will be responsible for which task? By when?

## About Your Organization

The leadership meeting is an opportunity for you to share your goals, successes, and challenges. You can share about your program services and learn about others. This meeting is a great opportunity to find ways to work together to help address some of the challenges your organizations are encountering. Share an accomplishment you are most proud of lately, and your commitment to collaboration. Below are things to consider sharing at the meeting.

*Tip: Provide information on your services, such as hospital discharge folders, program eligibility, outreach information, education, and appointment scheduling, etc.*

## WIC, Health Department, Home Visiting, Community Groups

- Tell them about your program and the experience someone has when they participate.
- What are the services your agency offers?
- Tell them about your staff and their expertise.
- Share how you prepare moms for the hospital (i.e. prenatal contacts, education, support).
- What prenatal education materials do you use?
- How can your partners refer to your program?
- How can you help each other (i.e. referrals, coordination of services, etc.)?

## Hospital

- What evidence-based practices do you offer on the birthing center?
- Tell the group about your task force.
- What do you wish moms were more prepared for?

- How could your partners help you with discharge education and referrals? (If available, would you be interested in: posters, brochures or handouts, breastfeeding counselors on the birthing center floor, and/or displays set up about WIC food packages?)

## Prenatal / Outpatient Clinic

- What education on maternity care practices and breastfeeding are you providing?
- What materials do you use to educate prenatally?
- When do you start the education?
- What staff is responsible for providing the information/education?
- How do you provide referrals to community partners?

## Opportunities to Work Together

During the leadership meeting, you can identify ways to collaborate. The following are some examples to consider.

- Provide an overview of each partners' services at staff meetings.
- Review each other's prenatal education and identify ways to collaborate and provide consistent messaging.
- Identify methods of referring to each other.
- Identify methods of communication between organization staff.
- Invite partners to the hospital task force meeting.
- Invite partners to hospital staff meetings (quarterly, twice per year, etc.).
- Collaborate with partners to engage providers.
- Compare partners and identify contacts for those who do not have them.
- Consider ways community partners can be integrated into the prenatal clinic and birthing center workflow.
- Review and participate in hospital community benefits and local health departments' community health improvement plans. Hospital community benefits and local health department: where do community partners fit into this process?

## Keep the Momentum Going

Keep the momentum going and continue to learn about each other's organizations. With your organization's leadership, select activities to immediately follow up your meeting.

- Set up a recurring meeting for this group to meet.
- Invite community partners on a tour of a WIC clinic (See [WIC Tour Toolkit.](#))
- Host a tour of the birthing center. (See [Hospital Tour Toolkit.](#))
- Schedule a tour of your organization or clinic.
- Arrange for community partners to attend one of your staff meetings to provide information on their program services.
- Extend an invitation to community partners for ongoing participation in the birthing center task force.

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## ABOUT TOOLKITS

Toolkits provide guidance to local organizations in their efforts to drive systemic change in their communities. Toolkits are developed based on local organization experiences and include curated examples to complete an initiative. Local organizations have provided permission to share the available resources.

If you would like to contribute a resource to this toolkit or have questions about this toolkit, please contact [solutions@coffective.com](mailto:solutions@coffective.com).

To access more examples of projects completed at the local level and supporting resources, sign up or log in to the [Coffective dashboard](#).