

Guidelines for Establishing and Maintaining State Driver Education Interagency Working Groups and Advisory Boards



ANSTSE

Developed by the Association of
National Stakeholders in Traffic
Safety Education

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Introduction

Crashes continue to be the leading cause of death among American teens, accounting for more than one-third of all deaths of 16 to 18-year-olds¹. Novice teen drivers continue to be over-represented in U.S. crash statistics since tracking began. The impacts of these senseless tragedies on families and society are immeasurable. To reduce injury and mortality among teen drivers by establishing standard guidelines and best practice for novice teen driver education, the *Novice Teen Driver Education and Training Administrative Standards* (NTDETAS) were developed in 2009.

NTDETAS, referred to as the Standards, define the future of driver education and assist in improving the delivery of driver education programs nationally. The Standards were developed by representatives from the driver education professional community with funding from the National Highway Traffic Safety Administration (NHTSA). The Association of National Stakeholders in Traffic Safety Education (ANSTSE) identifies and advocates areas of common ground for novice teen driver education and this stakeholder group extensively revised and released updated Standards in 2017. ANSTSE and NHTSA advocate for and support State adoption and administration of the Standards.

The purpose of this document is to assist State administrators with their understanding of appointing an advisory board and the steps necessary to establish quality novice teen driver education programs. Creating and establishing an advisory board and an interagency working group has been the most common recommendation in both the NHTSA State Driver Education Assessments and ANSTSE State Technical Assistance efforts. Many States continue to have questions concerning the establishment of a driver education advisory board and interagency working group. The terms advisory board/committee/coalition are compatible for the purposes of this document. These guidelines use the term advisory board; however, the State may choose to use a different term.

Standard 1.1.1. b. specifies for the State to “establish and maintain an advisory board of all stakeholders to provide input to the State agency/agencies.” A State driver education and training advisory board brings all stakeholders together to work collaboratively on novice teen driver education and training initiatives. In addition to an advisory board, States should also establish an interagency working group to collaborate on their driver education program. Establishing an advisory board and interagency working group brings all stakeholders in the State together to work on the common goal of improving novice teen driver safety and to share information. A State advisory board streamlines communication between the regulatory, educational and legislative groups within a State, improving programs and outcomes for novice teen drivers.

¹ Insurance Institute for Highway Safety and National Highway Transportation Safety Administration. “Beginning Teenage Drivers.” ANSTSE. <http://www.anstse.info/Resources%20PDF's/NHTSA%20Beginning%20Teenage%20Drivers.pdf>.

About ANSTSE

ANSTSE is a voluntary consensus-seeking association consisting of a diverse group of stakeholders who can successfully identify and advocate areas of common ground. This Association is not a regulatory body nor does it replace the roles of any member groups, Government, commercial or business entities.

ANSTSE was formed in 2010 as a result of the publication of the Standards, which were developed by representatives from the driver education professional community with assistance from NHTSA. The American Driver and Traffic Safety Education Association (ADTSEA) serves as the Secretariat to support ANSTSE activities. ANSTSE offers Technical Assistance, at no cost to States, to assist in implementing the Standards. For more information, visit www.anstse.info.

ANSTSE's Mission

- Promote the implementation of the Standards and keep the standard document and all subsequent Standards as living documents by providing a process to review and update Standards.
- Act in an advisory capacity to support shared decision-making as a community to identify areas of common ground and consensus to support the Standards.
- Encourage and strengthen support for shared decision-making throughout the driver education community to promote implementation of the Standards.
- Provide support in terms of lessons learned and experience to any State leadership that needs assistance in implementation of these or any subsequent Standards that the Association recognizes.
- Identify and make recommendations concerning areas of the driver education process and delivery that need to be refined, researched, validated, revised and standardized to promote the Standards.

ANSTSE Members

- AAA
- American Association of Motor Vehicle Administrators (AAMVA)
- American Driver Traffic and Safety Education Association (ADTSEA)
- Association for Driver Rehabilitation Specialists (ADED)
- Driver Education and Training Administrators (DETA)
- Driving School Association of the Americas (DSAA)
- Governors Highway Safety Association (GHSA)
- Transportation Research Board (TRB)

NHTSA Driver Education State Assessments

ANSTSE encourages all States to complete a [NHTSA Driver Education State Assessment](#). Assessments are designed to evaluate how well States align with the Standards, to assist States with evaluating their driver education program and to identify areas for improvement.

The Assessments are conducted by experts within the driver education community. As of 2018, assessments have been conducted in 11 States: Maryland, Oregon, Vermont, Delaware, Kansas, Idaho, Michigan, North Dakota, North Carolina, Illinois and Washington.

Two of these 11 States had an advisory board of stakeholders when the assessment was conducted. Nine States received a recommendation to establish one. Stakeholders are eager to be a part of the process which presents an opportunity for communication between responsible State agencies and stakeholder groups.

Driver Education Interagency Working Group and Advisory Board Structure

An interagency working group, advisory board and advocacy organizations improve communication between and among stakeholder agencies and groups. They assist in establishing a formal communication and decision making process, structure and procedures that provides periodic face-to-face exposure for the State agencies and key stakeholder organizations.

A “Driver Education Pyramid Structure” as shown to the right, can be used to explain the structure for how State driver education agencies and stakeholders should interact collaboratively. The structure centers around the “Three A’s”: Administration, Ambassadors, Advocacy.

1. State Interagency Working Group:

Responsible for the overall Administration of the State’s driver education program (see Section 1). The interagency working group is responsible for establishing and maintaining the State driver education advisory board. The working group should be comprised of select lead state agency representatives.



2. **Driver Education Advisory Board:** Established and maintained by the State interagency working group, the driver education advisory board consists of core stakeholders or *Ambassadors* and is focused on the programmatic nature of State driver education related issues (see Section 2). The advisory board should be comprised of a broad group of driver education providers, including partners, schools, instructors, parents, and other programmatic subject matter experts.

3. **All Stakeholders:** Current *Advocacy* organizations and groups that provide critical guidance for the State’s driver education program, for example, parent teacher associations (PTA) (see Section 3).

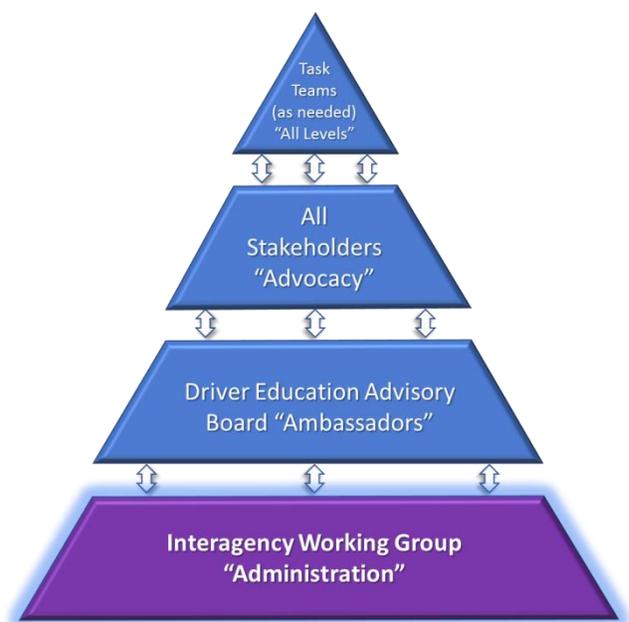
4. **Task Teams or Subgroups:** May be utilized at *All Levels* to work on specific tasks or deliverables (see Section 4). Task teams or subgroups may be established at the interagency working group or the advisory board levels. Task teams or subgroups at the advisory board level should include representation from the interagency working group and the advisory board and may also include representation from all stakeholders, if warranted.

Section 1: Establish a Driver Education Interagency Working Group

A State driver education interagency working group should be formed through a Memorandum of Understanding. The interagency working group should meet regularly to coordinate efforts and share information between agencies related to the State’s driver education program. In addition, the interagency working group should be charged with the coordination of the State driver education advisory board.

The interagency working group should include, but not be limited to, representatives from the following State agencies that have some form of responsibility for the management of driver education, training, testing and licensing:

- Department of Education (DOE)
- State Driver Licensing Agency (SDLA)
- State Department of Transportation (DOT)
- State Department of Public Instruction (DPI)
- Office of Highway Safety (OHS)
- Other responsible State agencies



A memorandum of understanding between agencies can be used to formalize the working partnership which also creates a foundation for the interagency working group to continue efforts into the future should there be staff changes at the agency level.

The driver education interagency working group, at a minimum, should:

- Identify the problems and issues the advisory board should address
- Identify the role of the advisory board and the expected outcomes
- Designate a board coordinator to manage and facilitate the advisory board activities
- Identify agencies, organizations and individuals to serve on the advisory board
- Maintain the advisory board members' contact information
- Plan and facilitate advisory board meetings
- Document advisory board meetings and activities
- Maintain and monitor the action plan developed by the advisory board
- Provide guidance and support
- Serve as the contact point for media, organizations and individuals seeking advisory board information
- Serve as the custodian for materials produced by the advisory board
- Evaluate the progress of the advisory board

A sponsoring or lead agency within the interagency working group should be identified to lead the driver education advisory board efforts. The State's Highway Safety Office is usually the most appropriate sponsor. Highway Safety Offices are responsible for the State's Highway Safety Plan. They already have a network of State and community based partners and they manage the highway safety grant funds.

Successful boards require a great deal of effort. The sponsoring agency must be prepared to dedicate sufficient resources to support the project.

A charter style document can be crafted by the interagency working group with input from the advisory board members that establishes expectations, components and procedures for the advisory board. A sample of such a document is provided in Appendix A.

Why Create an Interagency Working Group?

The purpose of the interagency working group is to:

- Discuss cooperative ventures to advance driver education in the State
- Synchronize the delivery of curriculum for behind-the-wheel (BTW), classroom and online instruction
- Synchronize the requirements for instructor qualifications and re-certifications
- Harmonize and tie driver education to the driver license, bringing about uniformity between private and public delivered programs
- Discuss the need for a potential legislative agenda

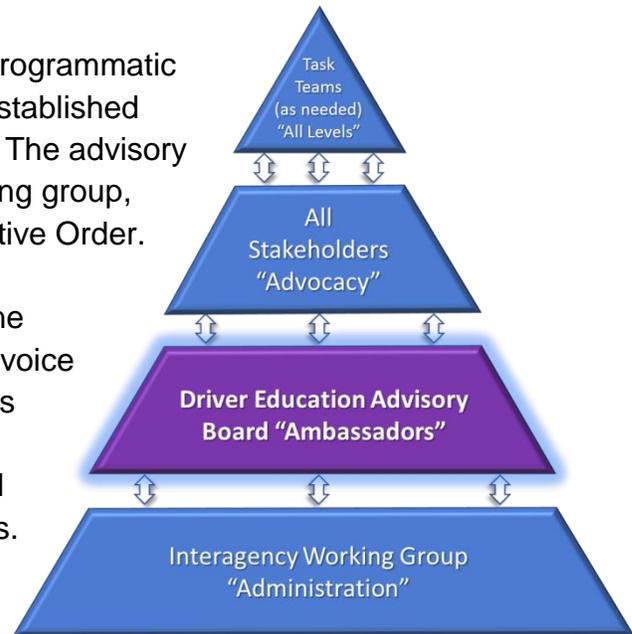
- Sequence and plan administrative rules, using the strength of partner/stakeholder agencies to move the program forward
- Evaluate data and initiate research studies and reports
- Create a multi-year plan of action, designating major milestones to be met along the way
- Build an understanding of the delegated authority of each involved stakeholder agency

Section 2: Establish a Driver Education Advisory Board

A driver education advisory board focused on the programmatic nature of the driver education program should be established and coordinated by the interagency working group. The advisory board may be established by the interagency working group, a memorandum of understanding, statute or Executive Order.

The advisory board should be comprised of front-line delivery partners that have been given an advisory voice on the efforts of the interagency working group. This advisory board will act as a sounding board or “test bed” for the initiatives and/or content that is created by the interagency working group and its subgroups.

The following are some groups and organizations that should be considered for the driver education advisory board or could be used as a resource or subject matter expert to the board:



Organizations useful at advisory board level	Resources or subject matter experts available
<ul style="list-style-type: none"> • One member of the Interagency Working Group (see Section 1) 	<ul style="list-style-type: none"> • State department of health
<ul style="list-style-type: none"> • Highway Safety Office 	<ul style="list-style-type: none"> • Data collection and analysis staff
<ul style="list-style-type: none"> • State or regional driver education safety education association(s) (public sector instructors) 	<ul style="list-style-type: none"> • Association of National Stakeholders in Traffic Safety Education (ANSTSE)
<ul style="list-style-type: none"> • State driving school association (private sector and public sector) 	<ul style="list-style-type: none"> • Highway and traffic engineers
<ul style="list-style-type: none"> • Public driver education teachers 	<ul style="list-style-type: none"> • NHTSA regional representatives
<ul style="list-style-type: none"> • Private/commercial driving schools 	<ul style="list-style-type: none"> • Driver education providers
<ul style="list-style-type: none"> • Instructor training organizations/colleges/teachers 	<ul style="list-style-type: none"> • Driver rehabilitation specialists
<ul style="list-style-type: none"> • Local and State law enforcement 	<ul style="list-style-type: none"> • State high school board
<ul style="list-style-type: none"> • Parent teacher association representative 	<ul style="list-style-type: none"> • Local AAA clubs
<ul style="list-style-type: none"> • Student/teen representative 	<ul style="list-style-type: none"> • Emergency medical services

What is an Advisory Board?

An advisory board is comprised of knowledgeable, prominent and credible stakeholders in their field of expertise. The terms advisory board, committee, task force or coalition can be used interchangeably. These guidelines use the term advisory board; however, the State may choose to use a different term.

Why Create a State Driver Education Advisory Board?

Although States strive to reduce the risks of driving, many States report a disconnect and/or a lack of communication between State agencies and stakeholders. An advisory board can encourage communication between State agencies and stakeholders, as well as advocate the interests of those who encourage driver education such as teachers and parents. The effort to make driving safer requires collaborating with a variety of public and private partners and implementing long-term action plans.

Administering a comprehensive driver education program requires an organization that keeps everyone involved, on target and contributing. Creating a driver education advisory board is one approach to managing such a program.

A well-organized advisory board permits government agencies, private organizations and individuals to:

- Identify the problems
- Establish common goals
- Communicate, cooperate and commit to a unified action plan
- Identify and share resources
- Distribute “workload” and reduce the possibility of duplicated efforts
- Increase influence and access to:
 - Policy and decision makers
 - Other stakeholders
 - Targeted audiences
 - Media
 - The public
- Develop processes to monitor and evaluate progress

Advisory Board Coordinator

The sponsoring or lead agency or co-agencies should designate a coordinator to manage and facilitate the board. Board members need to accept and understand the coordinator's role and duties.

The coordinator should:

- Maintain contact information of all the advisory board members
- Communicate frequently with the members to keep them focused and involved
- Provide support to the members and assist in resolving problems
- Inform the sponsoring agency's leadership on the advisory board's activities and progress
- Be the contact person for the advisory board, especially when dealing with media
- Be the custodian of the advisory board's plan
- Evaluate the advisory board's progress
- Schedule the meetings, finalize the agenda, facilitate and document the meetings (formal meeting minutes)
- Evaluate the members' involvement and participation to ensure the right people are serving on the advisory board
- Ensure deadlines are met
- Finalize and distribute advisory board status reports

The coordinator should be committed to the advisory board's goals, be open minded and neutral. The coordinator should see the "big picture" for the State's driver education effort. It is critical to avoid focusing on only one or two components. Since communication is essential for the success of the advisory board, the coordinator should be a good communicator and "people person." The coordinator must encourage partnerships and motivate the members to make the board a success.

Advisory Board Structure

The driver education advisory board should have a defined structure. How is it going to operate? What is it expected to accomplish? Should it have bylaws or operating rules? Will membership be permanent or will members serve terms? How will its efforts be evaluated? How will board activities be funded?

The sponsoring or lead agency must develop the advisory board structure prior to soliciting members. The structure will determine who should serve on the board. The sponsoring or lead agency should define the advisory board's role. It should determine expected outcomes and identify potential members.

The sponsoring or lead agency should:

- Identify the State's driver education concerns
- Define the goals of the board
- Determine how the board will function
- Define the members' roles and expectations
- Identify the agencies, organizations and individuals that are essential for achieving the board's goals
- Identify how the board activities will be funded
- Develop a process to evaluate board members' involvement

Advisory Board Membership

The driver education advisory board membership will determine its success or failure. Inviting the appropriate agencies, organizations and individuals to serve on the board is critical. The membership must be committed to the board, understand their roles and be willing to dedicate resources to the board. *Simply attending meetings is not enough.*

Most agencies and organizations will identify a representative to serve on the advisory board. The organizations and the representatives should understand that active participation is expected. The representatives should be interested in driver education and understand their role. They should be able to commit their organization's resources to the board's action plan. Being a long-time traffic safety expert is not a critical qualification for a board representative. Representatives must have an open mind and the ability to meet deliverables and milestones. The advisory board should consider creative initiatives and strategies.

The sponsoring or lead agency must remember:

- Members are often employed full-time and have other responsibilities than driver education.
- Communication is essential for success. Determine the most effective means to communicate with the members and make the communication meaningful.
- Avoid meeting too frequently, for too long or at out-of-the-way locations. Members have other responsibilities and may not get reimbursed for travel.
- Recognize the members' contributions face-to-face, at meetings and with letters of recognition to their supervisors.

Encourage cooperation and communication by making members feel they are part of the team and that their contributions are important. Not everyone can serve effectively on an advisory board. Members may need to be replaced. There must be a process for evaluating board members' contributions. Members should be given the opportunity to participate and perform. If members are unwilling or unable to be active participants, new members should be selected.

Advisory Board Meetings

The advisory board should determine the logistics for the initial meeting. The first board meeting is critical in establishing the board's goals and objectives. It sets the tone for future meetings and the functionality of the board. All meetings should be well-planned, have high energy and be informative. They should make the attendees feel part of the team and that they are contributing to the State's driver education effort.

Board meetings should provide the opportunity to overcome potential obstacles to the plan. The meeting organization and environment should encourage the members to participate. Board members should be encouraged to discuss issues and make suggestions. Avoid meetings dominated by presentations or "power plays."

The designated advisory board coordinator should facilitate the meetings. The board members should see the coordinator as neutral, open and trustworthy. The coordinator should:

- Encourage sharing information and resources
- Encourage "brainstorming" and the free flow of ideas
- Involve everyone
- Keep the meetings focused while allowing open discussion
- Be willing to discuss controversial issues while being sensitive to everyone's opinion
- Help formulate and communicate decisions
- Be willing to delegate and share responsibility
- Document all meetings and share the meeting minutes and resources with the board members as soon as practical

Meetings should be based on the availability of the board members. The agenda should be distributed in advance of meetings for review. If new topics are going to be discussed, the membership should be provided with reference materials prior to the meeting. If members are expected to provide reports, they should be contacted in advance to determine the status of their report and whether they need assistance.

Advisory Board Action Plan

The advisory board must develop an action plan to achieve its goals. Most board action plans require ample time to develop and complete. Action plans are seldom completed within one year. Most States develop a three to five-year plan. Formulating and obtaining approval for the plan requires effort and time. The plan should be realistic and achievable.

The action plan should identify:

- Problems that will be addressed
- Strategies to address the problems

- Action steps for the strategies
- The organizations or individuals responsible for the strategies
- Timelines for strategies
- Funds needed to complete the strategies
- Sources for funding
- Potential obstacles and solutions for achieving the strategies
- Expected milestones and outcomes
- A process for evaluating the value and effectiveness of the plan

The plan should be reviewed periodically for needed revisions. Regular status reports should inform the board members and other stakeholders of the plan's progress.

Hints for a successful board:

- Clarify the goals
- Identify the role and responsibility of the board
- Select the correct sponsor(s) and coordinator(s)
- Select the right members and partners
- Encourage communication and cooperation
- Be creative and realistic
- Adjust to potential problems and obstacles
- Create and document an achievable action plan
- Evaluate the strategies, action steps and the board's action plan

Challenges to Establishing and Maintaining Successful Advisory Boards

There are some challenges that should be considered when establishing and maintaining a successful advisory board. These challenges should not be viewed as barriers. These challenges can be addressed through organization and preparation.

Some challenges include, but are not limited to:

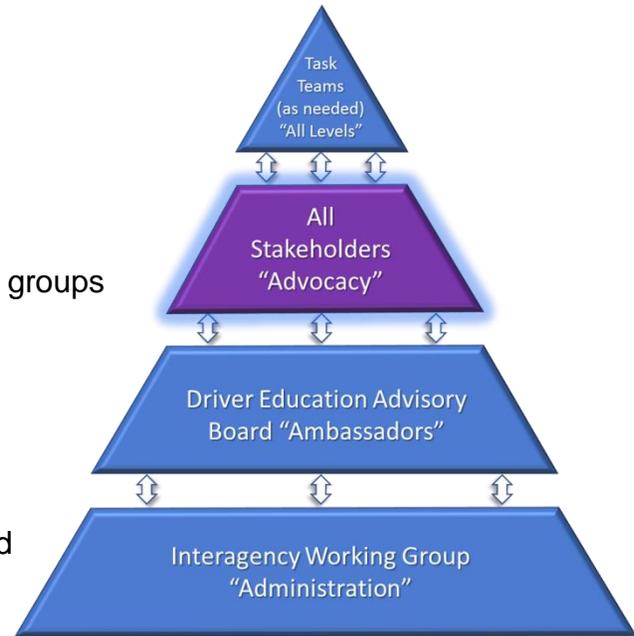
- Commitments from board volunteers for sharing of duties and tasks
- Ability of board members to attend face-to-face meetings
- Unclear focus or objectives to what needs to be accomplished
- Partners furthering their own agenda rather than the shared agenda of the board
- Ability to involve all stakeholders and maintain their interest
- Having too few members or too many members
- Lack of procedures for making decisions and solving disagreements when they emerge

For more information see Appendix C: Ohio State University Fact Sheet Coalition Facilitator Guide.

Section 3: Utilize Current Advocacy Stakeholders

Stakeholders should be informed of the advisory board efforts. Stakeholders provide advocacy and guidance for the State’s driver education program. They should include, but not be limited to, the following:

- Parent safety advocacy groups
- Teen safety advocacy groups
- National safety organizations
- National safety advocacy groups
- Regional and community-based advocacy groups
- Car dealerships
- Media representatives
- Insurance representatives
- Other safety organizations



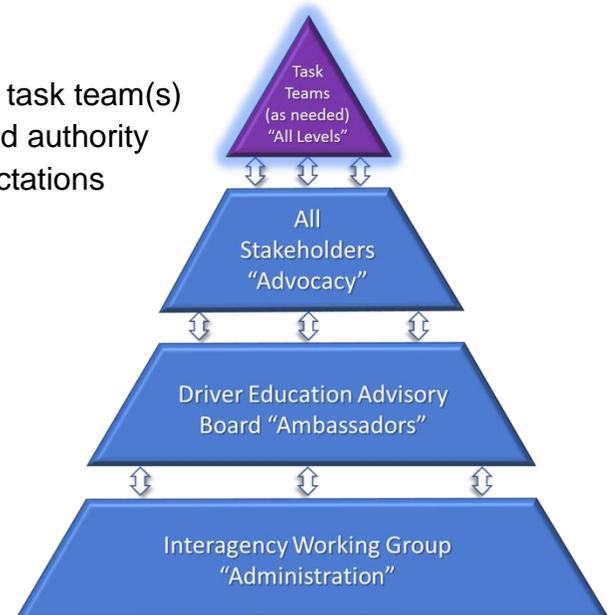
These stakeholders contain dedicated, committed and engaged leaders that have a wealth of expertise and the “will” to make improvements in the State’s driver education program. They should be engaged as stakeholder partners, may serve as liaisons to the advisory board and/or the interagency working group and may provide assistance and guidance to the overall program. They are a valuable resource for advocacy of the State driver education program.

Section 4: Task Teams or Subgroups

At the initial onset of the interagency working group, a task team(s) or subgroup(s) may be established that have delegated authority and been given the task of establishing baseline expectations within each of their respective topic areas.

Examples of task teams or subgroups could include:

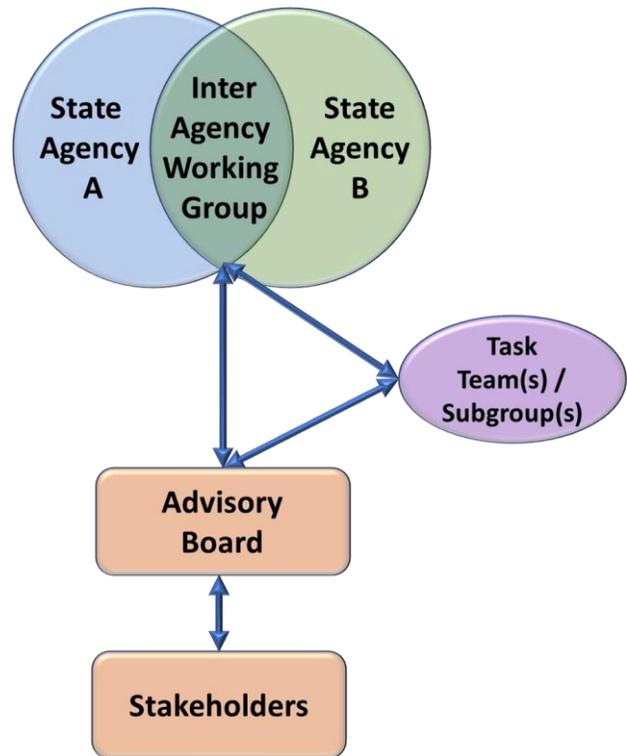
1. Administration
2. Education and Training
 - a. Traditional Classroom and Online
 - b. Behind the Wheel
3. Instructor Development and Certification
4. Parent/Guardian Involvement
5. Coordination with Driver Licensing



Task teams or subgroups may need to establish their own similar “sub areas.” All subgroups should consider, but not necessarily limit their work to, the following items:

- current statutory authority;
- opportunities for rule making;
- establishing performance measures; and
- identifying consequences of non-compliance.

Task teams or subgroups may be established at the interagency working group or the advisory board levels. Task teams or subgroups at the advisory board level should include representation from the interagency working group and the advisory board and may also include representation from all stakeholders if warranted (see examples above).



Task teams or subgroups normally focus on a specific issue and “sunset” upon completion. They should tackle each item deliberately, taking small bites until the effort is completed, before moving on to the next item. This approach will build momentum and trust among the partners. Their work will live on within the overall “driver education program structure pyramid.”



Appendix A: Sample Driver Education Advisory Board Charter

The Oregon Driver Education Advisory Committee provided this sample charter for other States to utilize.

A. BOARD'S OFFICIAL DESIGNATION: Driver Education Advisory Board.

B. AUTHORITY: As recommended by the Driver Education Management Team.

C. OBJECTIVES, SCOPE OF ACTIVITIES, AND DESCRIPTION OF DUTIES FOR WHICH THE BOARD IS RESPONSIBLE: The duties of the Board are solely advisory. The Board's responsibilities are to give advice on driver education issues. Duties of the Advisory Board are:

- i. Advise and confer on matters pertaining to the establishment of rules necessary to carry out duties of the driver education program;
- ii. Work towards the goal of making driver and traffic safety education programs available to all underage drivers of the State;
- iii. Review and update guidelines for the operation of the Driver and Traffic Safety Education Program;
- iv. Promote the Graduated Driver Licensing Program;
- v. Promote partnerships with Driver Services, including training and driving school regulations, etc.;
- vi. Act as a sounding board on forms and processes;
- vii. Provide a communication channel between driver education and stakeholder groups;
- viii. Stimulate public awareness of driver education needs and contributions;
- ix. Serve as an advocate of driver education;
- x. Influence driver education support through appropriate channels;
- xi. Lend credibility and stature to driver education programs; and
- xii. Establish sub-boards which will help accomplish the goals and objectives.

D. OFFICIAL(S) TO WHOM THE BOARD REPORTS: The Board shall report to the Driver Education Management Team.

E. MEMBERSHIP: The Driver Education Management Team shall appoint up to a maximum of nine voting members. Board members shall have expertise relevant to the functions of the Board. The Driver Education Management Team members are not a member of the board. The Board shall have nine voting members from the following groups:

Public Providers	Stakeholder Groups and Coalitions	Private Driving Schools
Teacher:	Teacher:	Teacher:
Classroom: BTW:	Classroom: BTW:	Classroom: BTW:
Administrator:	Administrator:	Administrator:
Business Manager:	Business Manager:	Business Manager:
Trainer of Trainers:	Trainer of Trainers:	Trainer of Trainers:

The requirements for membership are as follows:

Essential

- Commitment to attend the meetings regularly and to prepare in advance;
- Ability to grasp the details of proposals and make a positive contribution to meetings;
- Readiness to work as part of a team with other members in reaching decisions;
- Ability to “think outside the box” when considering new ideas and strategies;
- Discretion to keep the Board's work confidential; and
- Appreciation of the political and financial context in which driver education operates and of the Board's role as adviser and not a pressure group.

Liaisons

Additionally, the following agencies and stakeholder groups may appoint one staff person to serve as an ex-officio, non-voting member to the board:

- Office of the Attorney General, Division of Highway Safety;
- Department of Education (DOE);
- Motor Vehicle Commission;
- Universities;
- Teen Safe Driving Coalition;
- State Driver Education Traffic Safety Association;
- AAA;
- Insurance Groups; and
- State Driving School Association.

F. MEETING STRUCTURE, DATES AND DURATION: The Board meets twice a year. Meetings can coincide with the State Traffic Safety Conferences. Meetings are three to four hours in length. Meeting notices will be posted on the Driver Education webpage. Members are expected to attend meetings on a regular basis. Additional meetings shall be scheduled as needed at times and places when deemed appropriate. Agenda for the meeting shall be prepared by the Division of Highway Safety and supplied to the members not less than ten days prior to each meeting. The

minutes shall be kept and furnished to all members in a timely fashion. The first item of agenda at any meeting shall be to approve and amend the last meeting's minutes.

G. NUMBER OF MEETINGS, ATTENDANCE AND LOCATION: Meeting shall be open to the public. Notice of all meetings shall be given to the public via Division of Highway Safety. Any member not in attendance of 50 percent or more of the scheduled board meetings within a given twenty-four months will be replaced.

H. AGENCY RESPONSIBLE FOR PROVIDING NECESSARY SUPPORT: The Division of Highway Safety shall provide financial and administrative support to the Driver Education Advisory Board.

I. ESTIMATED ANNUAL OPERATING COSTS AND STAFF SUPPORT YEARS: Members shall be reimbursed for travel expenses in accordance with the State Administrative Rules. The total annual costs of operations will not exceed \$5,000. Board members may be allowed travel expenses. A member who is receiving a salary from the State shall not receive compensation other than travel expenses incurred in such service.

J. SUBBOARDS: To facilitate functioning of the Board, subboards may be formed. The objectives of the subboards are to provide advice and recommendations to the Board with respect to matters related to the duties of the Board. Subboards shall meet as the Board deems appropriate.

K. QUORUM: A quorum shall consist of five of the nine voting members for all business transacted before the Board.

L. TERM OF OFFICE AND FILLING OF VACANCIES: The term of office shall be for three years. Terms end in March of the third year. Terms shall be staggered. The Driver Education Management Team shall appoint members of the Advisory Board for three year terms. Members can serve a maximum 2 terms consecutively. The Driver Education Management Team shall fill vacancies on the Board and shall make reappointments to the Board. Recommendations to fill vacancies or to renew term appointments may be made by the Driver Education Management Team. Two full terms may be served after fulfilling an unexpired term.

M. CHAIRPERSON: The Chairperson shall serve for 2 years, with their remaining year on the board as a mentor to the incoming Chair. The Driver Education Management Team shall have the Driver Education Advisory Board vote on a new Chairperson at the conclusion of the previous Chair's 2 years, thus overlapping leadership for the board. This shall be done at that year's winter meeting. The incoming Chairperson's service shall begin at the following meeting after the first meeting of that same year.

N. VICE-CHAIRPERSON: The role of the Vice-Chairperson is to act as Chair when the Driver Education Advisory Board Chairperson is unable to attend a scheduled meeting. He or she is also responsible for chairing sub and ad hoc boards as deemed necessary by the Driver Education Board. The Vice-Chairperson shall serve for 1 year and can be re-elected to position for up to three terms. The Driver Education Management Team shall have the Driver Education Advisory Board vote on a new Vice-Chairperson at the conclusion of the previous Vice-Chair's 1-year term. The incoming Vice-Chairperson's service shall begin at the following meeting after the first meeting of that same year.

Being elected to Vice-Chair does not imply or infer that he or she will become the next board Chair. The Vice-Chair retains the "position" for which they were entered into the DEAC (Public Providers, Stakeholder Groups and Coalitions, Private Schools, At Large).

Appendix B: Sample Driver Education Advisory Board Policies and Procedures

The North Dakota Driver Education Management Team provided this sample policies and procedures document for other States to utilize.

Driver Education Safety Advisory Board Operating Policies and Procedures

The Driver Education Program [Advisory Board's] policies and procedures are guiding principles. The policies and procedures may be changed by a simple majority vote of the members of the [Advisory Board].

Section 1 Mission Statement

The [Advisory Board] will assist to strengthen the State Driver Education Program by providing real world experience. The board will advise, assist, support and advocate for driver education.

Section 2 Advisory Board Membership

The [Advisory Board] shall consist of stakeholders involved in the analysis, planning and implementation of a comprehensive driver education safety program. Responsibilities will be to regularly review the driver education program and make recommendations to the [responsible agency] to administer the driver education program.

The [Advisory Board's] purpose is to strengthen the driver education program. The board exists to advise, assist, support and advocate for driver education safety. The board has no legislative, administrative or programmatic authority and is advisory only. The board will work cooperatively with the [responsible agency] and the State driver education program managers to plan and carry out board work. Board members will be volunteers with expert knowledge and a desire to improve driver education safety in the State.

The [Advisory Board] will:

- **Advise.** Assess the driver education program and provide recommendations to improve the program. Recommendations could include identifying and moving toward industry standards, updates to the driver education training curriculum, recommendations for the purchase of new materials or equipment, and recommended changes to safety policies. Recommendations should be presented in writing to the [Advisory Board] Chairperson.
- **Assist.** Assist the program managers to carry out identified recommendations and/or activities.
- **Support and Advocate.** Promote the driver education program throughout the State. Promotion or marketing could include identifying industry and community

resources, talking to legislators, writing articles for local newspapers or arranging for publicity.

- **Report.** Provide an annual report to the [responsible agency] on any successes or barriers related to the driver education program.

All board members will serve a concurrent two-year term. However, in the first year of the [Advisory Board], in order for member terms to expire on alternate years, half of the members will serve a one-year term.

[Advisory Board] members will be recruited in accordance with established open appointment guidelines. General member qualifications include:

- Driver's License;
- Committed to reducing crashes, fatalities, and injuries through training and education;
- Willing to work cooperatively with the [responsible agency], the driver education program and interested parties;
- Willing to commit to attending meetings and to give personal time to prepare for and participate in meetings.

All new members will be provided with a copy of the [Advisory Board] policies and procedures, a card with the State's driving laws, a member contact list, a fact sheet and overview of the driver education program, the most current copy of the State Crash Summary and minutes of the last three meetings.

Membership on the [Advisory Board] is completely voluntary with no monetary reimbursement of any kind for mileage or meeting attendance.

Section 3

[Advisory Board]

[Responsible Agency] Designee

The [responsible agency] will appoint the Driver Education Program Manager as the primary contact to the Advisory Board. The [responsible agency] Program Manager will work closely with the board to provide information and assure recommendations from the board are communicated to appropriate [responsible agency] personnel.

Secretary

The Secretary is responsible to develop and distribute meeting minutes, agendas, and necessary background information to members at least one month before the next meeting. The Secretary is also responsible to assure the meeting minutes and board recommendations are sent to the [responsible agency] and the driver education program manager within seven days after a meeting.

Chairperson

A Chairperson will be elected by the [Advisory Board] in even numbered calendar years. The Chairperson is limited to two consecutive terms.

The Chairperson will preside all activity of the driver education program [Advisory Board] and its officers and will perform all the duties identified by the driver education program [Advisory Board] bylaws and any additional duties as required.

Chairperson duties include:

- Calling and presiding the board and meetings;
- Recommendation to the driver education program safety and operation policies;
- Testifying or delegating a board representative for the purpose of testifying, as necessary, on driver education safety issues, national policy and standards.

The Chairperson will not have the authority to enter into contractual agreements that financially obligate the driver education program or the driver education program [Advisory Board].

Vice-Chairperson

A Vice-Chairperson will be elected by the [Advisory Board] in odd numbered calendar years. The Vice-Chairperson is limited to two consecutive terms.

At the request of the Chairperson, or in his/her absence or disability, the Vice-Chairperson shall perform all the duties and responsibilities of the Chairperson. Upon the resignation or permanent future absence of the Chairperson, the Vice-Chairperson shall immediately assume the office and all responsibilities of the Chairperson.

Section 4 Meetings

The month, day, time, and location for each meeting shall be determined by the board with that information located on the top of each regular meeting agenda.

All regular meetings will be operated based on Robert's Rules of Order and are considered open meetings. Members of the public are welcome to attend and comment.

Attendance is critical for the [Advisory Board] to function. A quorum is required for voting on all issues. A quorum is one (1) more than one-half (1/2) of board. The Chairperson will determine the items that will have a silent ballot.

A member may be terminated for violation of the [Advisory Board] bylaws, policies or for any action deemed contrary to the mission or best interests of the driver education program [Advisory Board]. The driver education program [Advisory Board] Chairman will send written notice of grounds for membership termination. The member will have ten business days to respond to the board chairman and request a hearing. If no hearing is requested, the membership shall be terminated.

Within thirty days of request of a hearing, a panel shall be appointed by the board chairman to review the facts or mitigating circumstances. Membership privileges shall be suspended until the panel has made its final decision.

Section 5

Amendments to the Operating Policies and Procedures

The driver education program [Advisory Board] Operating Policies and Procedures may be amended in whole or in part per the following procedure:

- A proposed amendment must be submitted in writing by a member to be placed on the agenda of the next regular scheduled meeting. The secretary will have written copies available for review by the membership.
- At the meeting where the proposed amendment is presented to the [Advisory Board], the member requesting the proposed amendment will present information regarding the need for the amendment.
- After discussion by the board, a motion must be made and seconded to place the amendment for a vote at the next regularly scheduled meeting, or any special meeting called by the chair to address the proposed amendment.
- The proposed amendment must be mailed to each board member a minimum of 30 days prior to the next regularly scheduled meeting, or any special meeting called by the chair to address the proposed amendment.
- The Program Manager will submit the proposed amendment to the [responsible agency] for comment at least 30 days prior to the next regularly scheduled meeting, or any special meeting called by the chair to address the proposed amendment.
- At the scheduled meeting which will address the proposed amendment, a quorum must be present to vote on the proposed amendment.
- A motion must be made and seconded to adopt the proposed amendment with discussion to follow regarding pros and cons of the amendment. After discussion is completed, a two-thirds (2/3) majority of all members present must vote in favor of its adoption for the motion to pass.
- All amendments also must be approved by the [responsible agency].
- Upon acceptance by the board and the [responsible agency], the Secretary will provide updated copies of the Operating Policies and Procedures to all members, advisors and the [responsible agency]; noting all revisions and their dates on the table of contents page.

Appendix C: Sample Driver Education Advisory Board Memorandum of Understanding

The North Dakota Driver Education Management Team provided this sample memorandum of understanding for other States to utilize.

STATE DRIVER EDUCATION ADVISORY BOARD MEMORANDUM OF UNDERSTANDING

1. **General.** I, _____, agree to participate as a volunteer member of the State Driver Education Advisory Board (“Advisory Board”). I understand this is a volunteer position and that Advisory Board members will not receive any remuneration or reimbursement for participation on the Advisory Board.
2. **Term of Agreement.** I agree to serve a one or two year term (circle one) as an Advisory Board member. In order to stagger the terms of the members, half of the members will be asked to serve a one-year term. Involvement may include meetings and participation in activities relating to the board.
3. **Liability Release.** I agree not to hold the State, its employees, agents, representatives, or other volunteer participants responsible for any claims which may arise from the activities of the Advisory Board.
4. **Confidentiality.** I recognize that, as a member of the Advisory Board, I may be in a position to read or come into contact with confidential, private, and sensitive information in the course of my volunteer duties. I understand that this information is confidential and may not be copied, removed or shared with anyone other than the Advisory Board unless the information is required to be disclosed pursuant to (open records law). I understand that a breach of confidentiality of sensitive information will mean termination of my status as a member of the Advisory Board.
5. **Open Records.** Any records (including but not limited to e-mails, written notes, computer files, photographs, and other information) kept in connection with the Advisory Board may be subject to open records laws under (Code).

VOLUNTEER SIGNATURE _____

DATE _____

Appendix D: Examples of State Driver Education Advisory Boards

Three examples of State driver education advisory boards are the North Carolina Driver Education Advisory Committee, the North Dakota Driver Education Management Team, and the Oregon Driver Education Advisory Committee, which assist in implementing the strategies and action plans of the State's driver education strategic safety plan and work to reduce teen crash fatalities, injuries and crashes.

This Appendix includes an overview of:

- The North Carolina Driver Education Advisory Committee;
- The North Dakota Driver Education Management Team; and
- The Oregon Driver Education Advisory Committee.

Overview of the North Carolina Driver Education Advisory Committee

The North Carolina Driver Education Advisory Committee (DEAC) was established in 2013 by the General Assembly and approved by the State Board of Education. The committee was established based on recommendations from the NTDETAS to assemble an advisory board of interested stakeholders to advise the State Administrator.

- a. The purpose of the North Carolina DEAC shall be to advise and make recommendations to the State Board of Education through the North Carolina Department of Public Instruction on the implementation of the North Carolina Driver Education Strategic Plan and other issues related to driver education and traffic safety.
- b. The duties of the Committee are solely advisory. Duties of the DEAC shall be to
 1. Advise and confer on matters pertaining to the establishment of rules necessary to carry out the duties of the Driver Education Program and the implementation of the North Carolina Driver Education Strategic Plan.
 2. Review and update guidelines for the operation of the Driver Education Program.
 3. Promote the positive effects of the Graduated Driver Licensing Program.
 4. Foster partnerships with the NC Division of Motor Vehicles including testing, instructor training, driving school regulations and related protocol.
 5. Provide a communication channel between driver education and stakeholders.
 6. Stimulate public awareness of driver education needs and contributions.
 7. Serve as an advocate of driver education.
 8. Influence driver education support through appropriate channels.
 9. Lend credibility to driver education programs.
- c. Upon recommendation by the State Superintendent of Public Instruction, the State Board of Education shall approve appointments of up to a maximum of nineteen voting members. Committee members shall have expertise relevant to the functions of the Committee. The Committee shall have voting members from the following groups:

1. NC Department of Public Instruction
 2. NC Department of Transportation and Division of Motor Vehicles
 3. UNC Highway Safety Research Center
 4. NC Driver and Traffic Safety Education Association
 5. Commercial Driving Schools
 6. LEA Coordinators/Teachers
 7. University/Community College
 8. Law Enforcement
 9. NC Department of Insurance
 10. PTA Representative
 11. Student Representative
- d. The required qualities for membership are as follows:
1. General interest and expertise in driver education related matters.
 2. Preparation for and commitment to attend the meetings regularly.
 3. Ability to grasp the details of proposals and make a positive contribution to meetings.
 4. Readiness to work as part of a team in reaching decisions.
 5. Discretion to keep the Committee's work confidential.
 6. Appreciation of the political and financial context in which driver education operates and of the Committee's advisory role.
- e. The Driver Education Consultant from the NC Department of Public Instruction shall serve as staff to the DEAC.
- f. Meetings will be guided by Robert's Rules of Order. The Committee convenes on the third Tuesday in the months of February, May, August and November. Meetings are scheduled from 11:00 am to 3:00 pm. Members are expected to attend meetings on a regular basis, some of which may be held virtually.
- g. Additional meetings shall be scheduled, as needed, at times and places when deemed appropriate. The committee Chair, in consultation with the advisory committee members and Driver Education Consultant, will prepare an agenda for the meeting which shall be printed and distributed by DPI and supplied to the members and SBE, not less than 10 days prior to each meeting. An electronic summary of the minutes shall be furnished to all members, in a timely fashion and posted on the NCDPI website, under the Driver Education section, after adoption. The first item of the agenda at any meeting shall be to approve and amend the last meeting's minutes.
- h. The meetings shall be open to the public. Notice of all meetings shall be given to the public via the NCDPI Communications Office. Locations for two meetings will be in Raleigh at the selection of the Chairperson. The other two meetings may be scheduled throughout the State.
- i. The NC Department of Public Instruction, with monies from the Highway Fund for the Driver Education Program, shall provide financial and administrative support to

the Driver Education Advisory Committee, as allowed and funded by the General Assembly.

- j. When necessary, members shall be reimbursed for mileage. A member who is receiving a salary from the State shall not receive compensation other than mileage expenses incurred in such service.
- k. To facilitate functioning of the Committee, subcommittee(s) may be formed. The objectives of the subcommittee(s) are to provide advice and recommendations to the Committee with respect to matters related to the duties of the Committee. Subcommittees shall meet, as the Committee deems appropriate.
- l. A quorum shall consist of a majority of total number of voting committee members.
- m. The initial term of office shall be for two or three years beginning July 1 and ending June 30. The State Board of Education shall designate two-year and three-year term limits for initial members of the advisory committee. Committee membership terms will be staggered; thereby permitting new appointments to be made while retaining some experienced members. All subsequent appointments will be two-year terms. A member could serve a maximum of two terms consecutively with a required separation of two years before receiving a third term appointment. The SBE shall fill vacancies on the Committee and shall approve reappointments to the Committee. Two full terms may be served after fulfilling an unexpired term.
- n. The State Board of Education shall appoint a Chair from the membership of the Committee. The Chairperson shall serve as Chair for two years. A committee member may not serve for more than two consecutive terms as Chairperson.
- o. The DEAC shall elect a Vice-Chair from its membership. The Vice-Chair shall serve for two years. A committee member may not serve for more than two consecutive terms as Vice-Chair.

Overview of the North Dakota Driver Education Management Team

The North Dakota Department of Transportation (NDDOT) Safety Division established a Management Team for Driver Education in 2016. This office was designated as lead because it:

- Is responsible for all statewide traffic safety programs
- Manages National Highway Traffic Safety Administration federal grant funds

The Management Team includes representatives from the following State agencies:

- NDDOT Safety Division
- NDDOT Driver License Division
- ND Education and Standard Practice Board (ESPB)
- ND Department of Public Instruction (DPI)

The purpose of the Management Team is to:

- Discuss cooperative ideas to advance driver education
- Synchronize the delivery of curriculum (BTW and classroom)
- Synchronize the requirements for instructor qualifications and re-certifications
- Harmonize and tie driver education to driver license, bringing uniformity between private and public funded programs
- Discuss the needs for potential legislative agenda
- Sequence and plan administrative rules, using the strength of partner/stakeholder agencies to move the program forward
- Evaluate data and initiate research studies and reports
- Build an understanding of the delegated authority of each stakeholder agency

The team meets periodically to discuss ideas on how to improve driver education in North Dakota.

NDDOT Safety Division oversees the State's driver education public information and education efforts, including the development, production, implementation and dissemination of outreach materials. The NDDOT Safety Division collects, analyzes and interprets data and shares with the Management Team and public as requested.

Overview of the Oregon Driver Education Advisory Committee

The Oregon Driver Education Advisory Committee was established in 2003. The 1999 Oregon Legislature passed a law transferring the responsibilities to administer the driver education program from Department of Education to the Transportation Safety Division (TSD) of Oregon Department of Transportation (ODOT). Several task forces have been formed and in 2002, the Instructor Standards Implementation Task Force recommended the establishment of a standing Driver Education Advisory Committee. The advisory committee helps support and guide the driver and traffic safety program. The advisory committee has a direct, positive impact upon the transportation safety program. Representatives from public schools, community colleges, businesses and industry professions are afforded opportunities to work more closely to identify needs and necessary solutions to the issues facing driver and safety education.

OBJECTIVES, SCOPE OF ACTIVITIES, AND DESCRIPTION OF DUTIES FOR WHICH THE COMMITTEE IS RESPONSIBLE: The Committee's responsibilities are to give advice on driver education issues. Duties of the advisory committee shall be to:

- i. Advise and confer on matters pertaining to the establishment of rules necessary to carry out duties of driver education program.
- ii. Work toward the goal of making driver and traffic safety education programs available to all youthful drivers of Oregon.
- iii. Review and update guidelines for the operation of the Driver and Traffic Safety Education Program.
- iv. Promote the Graduated Driver Licensing Program.
- v. Promote partnerships with the Driver and Motor Vehicle Services, including private party testing, tester, training and driving school regulations. etc.
- vi. Act as a sounding board on forms, process, etc. on the Student Driver Training Fund (SDTF) reimbursement program.
- vii. Provide a communication channel between driver education and stakeholders.
- viii. Stimulate public awareness of driver education needs and contributions.
- ix. Serve as an advocate of driver education.
- x. Influence driver education support through appropriate channels.
- xi. Lend credibility and stature to driver education programs

The Committee's responsibilities include establishing sub-committees which help accomplish these ends.

OFFICIAL TO WHOM THE COMMITTEE REPORTS: The Committee shall report to the Administrator.

MEMBERSHIP: The Administrator shall appoint up to a maximum of nine voting members. Committee members shall have expertise relevant to the functions of the Committee. The Driver Education Program Manager is not a member of the committee. The Committee shall have nine voting members from within the following groups "Approved Provider" (including provision for an "At Large" position):

Public Provider (Schools, ESDs, Counties)

Teacher _____
 Classroom ____ BTW ____
 Administrator _____
 Business Manager _____
 Trainer of Trainers _____

Community College

Teacher _____
 Classroom ____ BTW ____
 Administrator _____
 Business Manager _____
 Trainer of Trainers _____

Commercial Driving School

Teacher _____
 Classroom ____ BTW ____
 Administrator _____
 Business Manager _____
 Trainer of Trainers _____

Additionally, if possible, each of the groups represented should have representation from each category within (instructor, administrator, trainer, etc.) The required qualities for membership are as follows:

- Must complete a DEAC membership application and return to ODOT-TSD Driver Education.
- Must be in good standing within the Driver Education community.
- Commitment to attend the meetings regularly and to have prepared in advance;
- Ability to grasp the details of proposals and make a positive contribution to meetings;
- Readiness to work as part of a team with other members in reaching decisions;
- Ability to “think outside the box” when considering new ideas and strategies.
- Discretion to keep the Committee's work confidential;
- Appreciation of the political and financial context in which driver education operates and of the Committee's role as adviser and not a pressure group;

Additionally, the following agencies/associations may appoint² one staff person to serve as an ex-officio, non-voting member to the committee.

- Department of Motor Vehicles (DMV)
- Western Oregon University (WOU)
- Chemeketa Community College (CCC)
- Driving Schools Association of Oregon (DSAO)
- Oregon Driver and Traffic Safety Education Association (ODTSEA)
- Community College Association (CCA)
- Oregon Insurance Division (OID)
- Oregon State Police (OSP)
- Parent Teacher Association (PTA)

MEETING STRUCTURE, DATES AND DURATION: The Committee meets quarterly. The October and March (Annual) meetings coincide with the State and regional traffic safety conferences. Meetings are three to four hours in length. Meeting notices will be posted on the Driver Education webpage. Members are expected to attend meetings on a regular basis. Additional meetings shall be scheduled as needed at times and places when deemed appropriate. Agenda for the meeting shall be prepared by ODOT-TSD or their designate and supplied to the members not less than ten days prior to each meeting. The minutes shall be kept and furnished to all members in a timely

² Subject to approval by the administrator.

fashion. The first item of agenda at any meeting shall be to approve and amend the last meetings minutes.

NUMBER OF MEETINGS, ATTENDANCE AND LOCATION: Meetings shall be open to the public. Notice of all meetings shall be given to public via ODOT-TSD. Any member not in attendance of fifty percent or more of the scheduled committee meetings with a given calendar year will be removed from the committee and replaced. The March meeting shall be in Portland at the Regional DE conference (PacNW). The October meeting shall be at the State DE conference (ODTSEA). The summer and winter meetings will take place at TSD. The July and January meetings will take place online (web meeting) at the discretion of the Committee Chair.

AGENCY RESPONSIBLE FOR PROVIDING NECESSARY SUPPORT: The Transportation Safety Division of ODOT shall provide financial and administrative support to the Driver Education Advisory Committee.

ESTIMATED ANNUAL OPERATING COSTS AND STAFF SUPPORT YEARS: Members shall be reimbursed for travel expenses in accordance with the Oregon Administrative Rules (OARs). The total annual costs of operations will not exceed \$5000. Committee members may be allowed travel expenses. A member who is receiving a salary from the State shall not receive compensation other than travel expenses incurred in such service

SUBCOMMITTEE (S): To facilitate functioning of the Committee, subcommittees may be formed. The objectives of the subcommittees are to provide advice and recommendations to the Committee with respect to matters related to the duties of the Committee. Subcommittees shall meet, as the Committee deems appropriate.

QUORUM: A quorum shall consist of five of the nine voting members for all business transacted before the Committee.

TERM OF OFFICE AND FILLING OF VACANCIES: The term of office shall be for three years beginning July 1 and ending June 30. Terms shall be staggered. The Administrator shall appoint members of the advisory committee for three year terms. Members can serve a maximum 2 terms consecutively. The Administrator shall fill vacancies on the Committee and shall make reappointment to the Committee with the approval of the Oregon Transportation Safety Board. Recommendations to fill vacancies or to renew term appointments may be made by the Administrator. Two full terms may be served after fulfilling an unexpired term.

CHAIRPERSON: The Chairperson shall serve for 2 years, with their remaining year on the committee as a mentor to the incoming Chair, if a new one is elected. If election is desired (Incumbent may serve an additional term as chair), the Administrator shall have the Driver Education Advisory Committee vote on a new Chairperson at the conclusion of the previous Chair's 2 year term, thus overlapping leadership for the

committee. This shall be done at that year's March meeting. The incoming Chairperson's service shall begin at the next regularly scheduled meeting of the DEAC.

A committee member may not serve for more than two consecutive terms as Chairperson. The Chair retains the "position" for which they were entered into the DEAC (Public, CC, Commercial, At Large).

VICE-CHAIRPERSON: The role of the Vice-Chairperson is to act as Chair when the Driver Education Advisory Committee Chairperson is unable to attend a scheduled meeting. He or she is also responsible for chairing sub and ad hoc committees as deemed necessary by the Driver Education Committee. The Vice-Chairperson shall serve for 2 years and can be re-elected to position for up to three terms, provided they remain eligible for committee membership. This election shall also take place at the winter meeting. The Administrator shall have the Driver Education Advisory Committee vote on a new Vice-Chairperson at the conclusion of the previous Vice-Chair's 2-year term. The incoming Vice-Chairperson's service shall begin at the following meeting after the March meeting of that same year.

Being elected to Vice-Chair does not imply or infer that he or she will become the next committee Chair. The Vice-Chair retains the "position" for which they were entered into the DEAC (Public, CC, Commercial, At Large).

Appendix E: Ohio State University Fact Sheet Coalition Facilitator Guide

CDFS-2

Charles H. Bell
Penne Smith

Coalitions and collaborations don't just happen. They come about because of a common problem and goal. But it still takes a person (or small group of persons) to provide the impetus to bring a group together and start things moving.

This person (or persons) may or may not also assume the role of facilitator.

The facilitator conducts meetings, is able to bring diverse ideas together, and also helps the group in working toward mutually identified and achievable goals. Also, the facilitator should be perceived by the coalition participants as trusted and neutral.

• ROLE OF THE FACILITATOR

The most important role of the facilitator is to lay the groundwork for trust to grow as the partnership develops. Openness and informality, the absence of "power plays," and sharing ideas help create on-going relationships. The facilitator builds a foundation of trust and commitment by:

- Teaching people to think in new ways about sharing information and resources.
- Establishing brainstorming sessions to allow all ideas to flow without worrying about methodology.
- Helping tie together various comments questions and concerns raised in discussion.
- Being sure everyone is aware of decisions being reached.
- Involving the "quiet" people during the meetings.
- Being process and goal oriented. Keeping the meetings and discussion focused on the objective of the group. Being alert and sensitive to the fine line between diversionary and related helpful discussion.
- Discussing controversial issues thoroughly. Rather than pushing things through, attempt to reach a consensus.
- Being aware of decision-making processes and those used by other coalition members.

• QUALITIES OF FACILITATORS

If the coalition is to succeed, the facilitator must recognize the usefulness and importance of sharing with others across and within systems. Qualities of a successful facilitator are:

- A positive mental attitude, especially when people predict failure before the project is given a chance to succeed.
- Strong commitment to the goals of the group.
- Ability to listen and reflect on what was presented.

- Neutrality. If controversial issues arise he or she needs to ensure everyone in the group has equal opportunity to express their views in an atmosphere of comfort and confidence.
 - Awareness of what is not being said and how to have it stated.
 - Awareness of when to facilitate and when to participate.
 - Ability to "seize the moment." When to conclude the discussion and move to the next step by consensus.
 - Good interpersonal communication skills including equal treatment and listening.
- FACTORS WHICH INHIBIT COALITIONS
 - Competitiveness.
 - Dominating rather than shared leadership that discourages group decision making.
 - Inflexibility in scheduling meetings and activities.
 - Lack of understanding about how schools and community agencies operate.
 - Hidden agenda for personal advancement.
 - Cynicism about the advantage of information sharing.
 - Time constraints and pressure to "push things through" without giving adequate time for discussion to work through conflicts.
 - More emphasis on talking than listening.
 - Preferring to do things alone rather than spending time negotiating.
 - Prescribing actions for a partnership (coalition) from the top down.
 - Lack of procedure for making decisions and solving disagreements when they emerge.

- A TIP FOR THE FACILITATOR

Keep a journal. It can:

- Track the process of coalition development. It will help analyze, compare and determine overall progress.
- The abilities of the facilitator can determine the success of a coalition group. Walking the tightrope of neutrality, developing trust, and guiding the group toward consensus goals will go a long way toward having a successful coalition.

- A COMMITTEE IN DISGUISE

Starting and maintaining a coalition is no big mystery. It is similar to starting and maintaining a committee where there is a need and people interested in finding a solution. The United States started as a coalition of colonies with a need (problem) and people interested in finding a solution.

Though the functions of a committee and a coalition are very similar, the word "committee" may need to be avoided. Negative comments have often been made about committees. For example: "The camel is just a horse put together by a committee." "The fewer committee meetings the better." "Too much of my day is used up in useless committees."

- ELEMENTS FOR SUCCESS

- **Common Goals**-What is the expressed need (or "problem equals . . .") the group agrees is a priority. What is the desired change? These need to be understood by all involved.
- **Communication**-Use common language that everyone can understand. Avoid professional jargon. Each member needs to know what is taking place and what is expected. For example, minutes of meetings should be distributed to all members.
- **Each Member is Important to the Coalition**-Each participant should be able to perceive themselves as an important part of the whole, contributing to its success.
- **Opportunity to Participate**-Each member should have input into goals, methods and decisions, as well as discussion.
- **Ownership**-Feeling a part of the coalition and responsibility for some action is an important result of participating in the decision-making process.
- **Delegation**-Delegate to each entity a part they can control. That provides an opportunity for individual accomplishments as well as contributes to the overall success of the coalition.
- **Efficient, Effective Meetings**- Keep the meetings moving toward the agreed goals. Each should show progress toward the overall target(s) and participants should recognize this progress when they leave.
- **Process and Pattern**-Establish a format for conduct of meetings and decision-making early in the development of the coalition.
- **Shared or Situational Leadership** -It is important that many persons or groups share leadership responsibilities.

While attention to group goals and objectives is essential, developing and maintaining committees and coalitions is also an interpersonal process. This requires close attention to group process and skills.

- SUMMARY

The principles that relate to effective coalition functioning coincide with the principles of effective committee functioning.

- YOUR ROAD MAP TO SUCCESS

Before you start a trip, you may need a road map to tell you how to get to your destination. A coalition also should have a plan for how they want to meet their goals. This fact sheet will help develop your plan as a coalition, to be successful.

This fact sheet will:

- Provide a process for coalitions to develop a course of action for establishing realistic goals/objectives.
- Provide a method to accomplish realistic goals set by the coalition.

- CHARACTERISTICS OF GOALS

It is important that members of the coalition keep certain characteristics in mind as they develop goals. As each is developed, put it to the test. Does it include the following characteristics? Goals must be:

- **Believable**-They should describe situations or conditions that the coalition believes can be achieved. Avoid the "pie-the-sky" goals that members do not believe nor find possible to do.
- **Attainable**-It should be possible to do the goals in the designated time.
- **Tangible**-The goals should be capable of being understood or realized.
- **On a Timetable**-A completion date should be included in the goal statement.
- **Win-Win**-The goals must allow all members of the coalition to be successful.

After the goals have been established, allow the members to review them before they are written in final form. Input and acceptance is a vital ingredient to successfully accomplishing the group's goals.

- ESTABLISHING COALITION GOALS

By the time goal setting takes place members or organizations should have already participated in a needs assessment. From this the group:

- Develops a list of priorities (worksheet on brainstorming) .
- Shares what problems or needs are being addressed by their agency/organization (individual goals).
- Identifies group goals. Finds new problems to address and enhances present work on problems.

Group goals need to be a blend of individual goals. It is vital that all members of the coalition participate in goal development. This will:

- Help meet member's needs and interests.
- Show how individual action can lead to group goals.
- Stimulate cooperation and commitment.

It is also important for all coalition members to:

- Allow each group member to keep their identity and specialties. Draw on each other's strengths.
- Not allow hidden agendas to jeopardize the work of the coalition. Members should be honest, up-front and willing to modify their ideas for the goals of the coalition.
- Recognize everyone for their involvement. A coalition is a cooperative effort to address a problem and the same is true for the recognition.

- **TURNING GOALS INTO ACTION**

It is vital for the coalition members to write the group's goals. Goals that are in one's head are merely dreams, but written goals are a commitment.

Goals are turned into action by working from the long term to the short term. Decide what must be done and in what order. Next decide what will be done during a specific period. Design small specific bite-size programs and activities that support the short-term goals. If order is important decide a sequence for your activities. These questions will help:

- Where does the group want to be in one year? Six months?
- What "bite-size" programs or activities will move the coalition toward this position?
- What program or activity should be done at the next meeting?

- **SUMMARY**

The general goal of a coalition is the positive change in people and programs. By developing sound goals the coalition will have a road map that will enable you to address issues of today and tomorrow.

Structure - Construction of a Coalition

- CDFS-11

Penne Smith
Charles H. Bell

Structure may refer to the form by which the collaboration accomplishes its mission. The people, who lead, participate in and eventually implement the activities of interagency initiatives, affect the growth and development of joint efforts.

The coalition is essentially a mechanism for increasing the power or leverage of groups or individuals. The object is to get more out of the coalition than is put into it.

Situations, although difficult or impossible for the individual to overcome alone, can be dealt with simply and rapidly by acquiring the right allies. This is coalition building.

Begin by analyzing the problem: What do you want to achieve? Who can help (or hurt) your efforts? What are the rewards for becoming part of a coalition? What action is needed to meet the objectives?

A coalition should be structured to:

- Involve all key players.
- Choose a realistic strategy.
- Establish a shared vision.
- Agree to disagree in the process.
- Make promises that can be kept.
- Build ownership at all levels.

- Institutionalize change.
- Publicize successes.

- WHO SHOULD INITIATE A COALITION?

The initiating organization will experience success in effecting collaboration if it can show the credibility of the employees and their commitment to collaborative efforts. Those who form the coalition must develop a loyalty to the core group that is strong enough to cope with competing pressures from their organizations.

Obviously, no collaborative experience is identical with any other. The greater the functions complement (as contrasted to being similar) the collaborative venture and the individual members, the greater the likelihood of cooperative action.

- SUPPORT FOR THE COALITION

The social and political climate in a neighborhood or community is the first factor likely to influence an interagency initiative.

Bringing key decision makers into the coalition at the beginning gets them interested in the issue. It also helps keep it alive through constant visibility with community leadership and the press. Involving key decision makers gives credibility to the project.

Three fundamental items are needed by coalitions to develop enough political power to influence change- unless, of course, one has a lot of money with which to buy access and influence. The key ingredients are information, numbers of people and widespread coordinated activity. Coalitions need information- about what is or ought to be proposed, its implications, the alternatives, the forces on both sides of the issue, and so forth.

Ask policy-making committees locally or statewide to support your coalition efforts. You may want to:

- Obtain agreement on plans.
- Develop awareness of services within agencies within the local community.
- Involve officials in problem-solving.
- Seek advice and evaluation.
- Share planning, implementation and local support received.
- Ask elected officials to endorse policies and plans.

- WHO SHOULD BELONG TO THE COALITION?

Collaboration begins with the selection of resource people who have experience in dealing with the particular issue and understand the common goal. They have the authority and power to influence change and the energy and enthusiasm for keeping the momentum alive.

Initial contacts usually work best if they are between agency administrators. This follows protocol and allows the administrator to delegate the responsibility. It avoids the administrator hearing about the contact from someone lower in the agency, becoming

suspicious and defensive, and scuttling the effort before it begins or initially putting it on bad footing.

Broad-based representation- including youth -is critical. Failure to establish mutual goals and objectives is a major reason collaborations fail. Collaboration rests upon the principle that each person has something to offer.

Traits like patience, persistence, initiative, flexibility, risk-taking, empathy, self-assurance and self-realization are critical to working in a collaborative relationship with others.

Begin by determining all the natural allies- individuals or groups who share the concern and support a similar position. Continue by seeking all types of persons, groups and social structures likely to be affected by the issue or position taken both affirmatively or negatively. Do not forget to include all potentially interested and civic-minded groups who might stand to gain indirectly by supporting the issue or constituents.

- HOW TO RECRUIT MEMBERS

The first thing one must know to work with another agency is what it is and does. Face-to-face meetings can address the initial unknowns and allow staff from both agencies to get as much detailed information as necessary.

Building upon existing efforts saves time, resources and creates strong working relationships.

Develop a strategy for selling potential members on the idea of organizing a coalition around issues. The organizer must be clear about how the members of other organizations, their public image, their organizational goals, and so on will be enhanced by involvement in the coalition.

One must be prepared to discuss with each potential member organization the following issues:

- The relationship of this coalition to issues or activities already undertaken or contemplated by the organization.
- Evidence that the issue to be pursued by the coalition is best served through a coalition rather than through existing organizational efforts.
- The immediate and long-range consequences for the public, government, beneficiaries and so forth.
- The specific impact the organization is likely to experience because of the coalition effort and the effect it will have on the coalition.
- The major decisions that must be made about the coalition and its goals.
- An assessment of the resources (staff, financial, in-kind) available to and necessary for the coalition to function adequately.

If you are not familiar with or have a negative impression of another agency, the first step is to become acquainted. The main objective of an initial contact is to open communication.

Finally, another way of identifying groups is by administering a community information questionnaire. This also gathers data about the political, social, economic and power bases in the district. This information could serve as a starting point for determining the constituencies from which coalition members will be recruited.

- KEEPING THE MOMENTUM ALIVE

Formally-organized coalitions have a governing committee that establishes policy and generates funds. To maintain credibility, the committee's composition should represent all community segments the coalition wishes to embrace.

Once the committee is established, a common practice is to form committees to oversee the coalition's projects. Tasks can be allocated among committees that enlist the help of additional participants.

There is yet to be a collaborative effort that functions perfectly, but there is encouragement. Collaboration is a new growth area that is stimulated the more it is practiced.

- FORMAL VERSUS INFORMAL COALITIONS

Once agencies decide to work together, they also must agree on whether their coalition will be primarily cooperative or collaborative in nature.

A collaborative strategy is where the need and intent is to change the way services are designed and delivered throughout the system. In communities not yet ready for collaborative partnerships, initiatives to coordinate existing services offer a reasonable starting point for change.

Three types of collaborative missions exist: service-oriented, where direct services are provided; system-oriented, where efforts are targeted at improvement of the service delivery systems; and dual mission, which encompasses both service and system initiatives. Service and system collaborations differ radically.

Designed to address immediate needs and to improve tangible services, service collaborations chart more circumscribed, easily-accomplished tasks than those generally undertaken by system collaborations. Feedback is more immediate, gratification quicker and impact more visible. Conversely, the accomplishments of system collaborations' tend to be longer in process, more abstract and less visible. Thus, evaluation needs to discern carefully among service, system and dual mission efforts, with attention to their differing challenges, timeliness, processes and outcomes.

- MAINTAINING THE COALITION

Flexibility is the essential condition of a successful collaboration. No matter how carefully goals are defined at the outset, they are routinely challenged, making goal reassessment an ongoing necessity. Early "fiascos" or "aborted efforts" demand flexibility in responding to failure and the re-contouring of collaborative activities. The most effective collaborations appear to be strengthened, not defeated, by disappointments and challenges.

Coalitions need to exist only as long as it is useful to its members. But, when it disintegrates before achieving its goal, it usually has fallen victim to one of these defects:

- Failure to keep members informed about the policies and actions of the organization. Lack of information is a prime reason for believing the coalition has been ineffective and therefore for dropping out. To keep the information flowing, it is often necessary to publish newsletters, set up telephone networks or hold frequent discussion meetings- even when no decisions have to be made.
- Lack of interim rewards for members. The failure of a coalition to show some concrete results short of ultimate victory often discourages its members. To provide interim reinforcement, it may be necessary to sponsor social events: boat cruises, hayrides, cocktail parties and picnics. Important public figures, such as local office holders, may be asked to attend these activities to show support for the coalition's goals. Such gatherings are essentially surrogates for more tangible rewards, but may work well as stopgap measures.
- Loss of key leaders. An organization may develop a serious vulnerability if one dominant leader prevents others from sharing power. In a well-structured alliance, the leadership role is diffused so the loss of any one person would not be fatal.
- Serious irreconcilable splits over the coalition's direction. Such splits may suggest the coalition was weak to begin with, perhaps because it lacked requirements for cohesion, such as ideological ties. Splits tend to occur during moments of crisis when two seemingly attractive policy alternatives present themselves, or a frustrating defeat is suffered.
- Change conditions. When circumstances arise that were not present when the coalition was formed, it may be unable to adapt. It perishes because its members recalculate the costs and benefits in light of the new circumstances, and the results encourage defection.
- Delay. Unless a coalition is intended to be permanent, the members expect it to achieve its main objective within a reasonable time.

• RECORDING MEETINGS

A decision should be made early in the planning to set up a mechanism for sending out notices of meetings and recording and distributing meeting minutes. Keeping meeting minutes is important to communicate key ideas that have been discussed, document resolutions and record other important actions.

It is not always possible for everyone to attend all the meetings, so minutes should always be sent to the members. Keeping everyone informed about how the coalition is developing will do a great deal to keep communication channels open.

• USE OF VOLUNTEERS

The greatest pool of unused resources for meeting human service needs is the pool of untapped volunteer time and energy. The Gallup Poll shows that the majority of

Americans above the age of 14 are ready and willing to give volunteer time for community service.

Every day volunteers and other social practitioners and people-helpers develop innovative, creative and experimental ways to help their clients. Usually, however, they have no way to document their new practices. They simply exchange them verbally and informally, and many get lost. It is estimated that thousands of inventive social practices are lost each year for lack of a good way to share them.

Organizations using volunteers need to develop methods for bringing these social inventions to light. A cross-agency conference could bring together volunteers in a particular field, such as those working with 16 to 21-year-olds. They can share what they have found to be successful in working with this age group. Someone can record each respondent's name and address and his or her successful practice, so it can be used by others. Such a conference is also a good way to begin or strengthen collaboration between agencies, as it demonstrates their interdependence and enriches them both.

- SUMMARY

The people or groups recruited into the coalition, the support for and where this support comes from in the community and the design form the structure of the coalition. These need to be planned with purpose so the coalition can be a successful venture.³

³ Bell, H. Charles., Smith, Penne. Coalition Facilitator Guide. *Ohio State University Fact Sheet*. <http://ohioline.osu.edu/bc-fact/0002.html>

