



COALITION BUILDING WORKBOOK

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Coalition building is tough work but it is crucial to help ensure any effort is successful for the short- and long-term. This workbook breaks down the process to help make your work more manageable and hopefully, easier for you and the partners in your coalition. As you walk through this workbook keep in mind the following:

- ▶ This content is, optimally, implemented in a sequential manner but the real world might not allow for that and that is ok!
- ▶ If one-step or section does not fit or make sense, skip to the next section that does make sense to make sure you can maintain momentum/forward movement of building or supporting your coalition.
- ▶ Do your best to leverage each section as best as you can, knowing you can fill them in later or when it makes sense for you or your coalition.

What is a Coalition?

Coalitions are one way collaboration can happen to achieve a shared agenda. Coalition building is the process to bring partners together and define action to accomplish its goals. Key attributes include the following:

- ▶ Coalitions are formal or informal relationships among organizations and individuals defined by a common cause, issue, or mission.
- ▶ A coalition can be local, regional or statewide, or span the nation.
- ▶ They can include like-organizations or organizations from different sectors. They can include public, private or philanthropic organizations.
- ▶ Coalitions often form in times of crisis or political pressure. Coalition members come together for a particular purpose and then may disband.
- ▶ Coalitions require administration, staffing, and financial resources to coordinate their work. There are explicit expectations around the role of coalition members.

Collaboration

is an umbrella term that describes the action that groups take together. Those groups can take many forms. Collaboration can happen through coalitions, alliances, or network structures. Regardless of the size or make-up of your effort, Advocacy & Communication Solutions, LLC (ACS) has the experience to help you get from point A to point B. Learn more by visiting our website at www.advocacyandcommunication.org.

Advocacy & Communication Solutions, LLC (ACS) identifies six components of a strong and effective collaborative effort (such as a coalition). They are:

- 1. Purpose and Goals**—Have an explicitly stated purpose and goals to drive all activities of the collaborative.
- 2. Capacity and Leadership**—Ensure staff, partners or others involved have the capacity to implement activities. Have strong leadership to keep the collaborative on track to achieve goals.
- 3. Partners and Expectation**—Identify the right partners, and others who will have a role in coalition activities. Help those involved understand their role and expectations.
- 4. Communication**—Have explicit internal communication with partners and external stakeholders.
- 5. Understanding the Environment**—Collect and use information about assets, barriers or challenges to achieving the goals.
- 6. Tracking Progress**—Assess where you are and how to improve in your collaborative efforts.

Use this workbook as a check-list to help you think through each element of building a coalition and map out how you will engage partners in your community.

1. Purpose and goals

Start with the end in mind. Think through the big picture and what will be accomplished by the coalition.

1. What will be different as a result of the coalition's work?

2. Are you working with others to bring the coalition together? These are your key partners. Do all key partners understand the purpose of the coalition?

3. What is/are the coalition's one, two or three-year goal(s)?

4. Does the goal need to be better refined or defined?

5. Do you have a set of strategies to guide the coalition's work toward its goals?

6. Is there a written work plan to guide the coalition's day-to-day activities?

7. What approach is the coalition taking to achieve its goals? (i.e. paid media, education of stakeholders or general public, advocacy, etc.)

8. What is the general timeframe for the coalition to do its work? (e.g. working toward a specific event)

2. Capacity and Leadership (and structural decisions)

Does the structure of the coalition help it to meet its goals? Some early childhood coalitions are driven by one organization or agency. Others use a board or committee structure to make decisions. Much of this depends on the size of your community, the amount of time dedicated to early childhood issues, and ability to consistently meet to make decisions. You may have leaders or decision makers *and* general coalition members. That is OK, as long as the role and expectations are clearly laid out for both.

For example, Coalition X has an advisory committee that serves as leaders and decision makers. One organization on that committee has a staff member who coordinates meetings. There is a Chair and Vice-Chair who lead the meetings. General coalition members may be effective spokespersons for advocacy efforts. They are expected to participate in big events.

Some options include:

- a. A small core leadership team made up of 2–4 leaders from local organizations or agencies (i.e., school district, teachers union, City or County government, a foundation, intermediary organization (such as United Way)). This approach is used when decisions need to be made quickly and when leadership has a solid understanding of the direction they need to go. Even with a small group, this approach requires someone to coordinate meetings and take notes to memorialize decisions.
- b. Convene a steering committee made up of 5–12 community leaders. This approach can extend the reach of funding and marketing opportunities by including more people in the decision making process. This is a good way to secure buy-in from individuals. This approach requires strong facilitation to bring the group to consensus on key decisions.
- c. Convene action teams made up of community stakeholders who know about early childhood (i.e., non-profit leaders, faith-based leaders, childcare providers, school leaders, teachers, principals, etc.) and how to access different types of funding (i.e. federal grants or individual donors). This option is good for those that want input from a cross-section of the community and insight into community need. It requires a strong facilitator to move each action team to decisions and a coordinator to ensure the decisions come together in a cohesive way for the overall effort.
- d. All of the above. Some early childhood coalitions use all three approaches in different ways. If you would like to explore ways to use all three, outline who you think will be part of each group and what types of decisions you think they should make. For example, a small core leadership team could make decisions final decisions based on recommendations from a steering committee and action teams. A steering committee made up of community leaders and experts could make financing recommendations, recommendations about curricula, or what professional development teachers should have access to annually. Action teams could make specific recommendations how to improve early childhood in your local community.



1. Who are the decision makers for the coalition? If these are not coming easily to you jump down to the next section to think through the partners and expectations and then come back to this section.

2. Some coalitions utilize a small core leadership team, action teams, steering committees, or all of the above to make decisions and implement the work of the coalition. The same group of people may not make all of the decisions. If different groups make different decisions, outline what they are here.

3. Who will coordinate and do the day-to-day work of the coalition? Is there dedicated staff for the effort? What is their role? (e.g. Resources may be needed to coordinate the effort, schedule meetings, conduct follow, locate or create documents/research, communicate with stakeholders, and manage the project timeline.)

4. Who will facilitate the meetings?

5. What is the capacity of the organizations and their staff and leadership to do the necessary work of the coalition?

6. Does the coalition have the financial resources needed to implement its work? Is there a plan to close any financial gaps?

7. Is there anyone missing from the leadership of this effort? In general? Think of individuals or organizations that can help fill capacity gaps.

3. Partners and expectations—

1. **Make a list. Identify the organizations or individuals you want to be involved in your coalition, including those with similar interests, those that influence funding or rules, and other influencers. They could include individuals from: local or state government, non-profits, for-profit, business, education, faith-based, or philanthropy.**

Pay attention to unlikely partnerships.

Unlikely partnerships may be individuals or organizations that do not have a direct stake in your issue, but can be useful in showing that your issue is cross-cutting. Some examples may include: criminal justice organizations or judges supporting early childhood education or economic development supporting the reduction of homelessness. Because they are often from a different field, you must have a rationale and a plan to bring them in, engage them appropriately and follow-up with them. Name a few unlikely partnerships for your issue below.

- a. _____
- b. _____
- c. _____

2. **After making your list, fill in this chart.**

Name the organization	Why them?	What do you want them to do for the coalition?	What type of individual from this organization needs to be involved? (e.g. you may or may not need the organization's CEO depending on the organization's role.) Name the individual if you can.	Is this the right time to bring this partner into the coalition? If not now, when?	Who should approach the potential partner? How will they do it? When?



3. What is the commitment level for leadership organizations in the coalition?

What about the general coalition members? (i.e. number of meetings a year, sending information out to their networks, etc.)

4. How will expectations be communicated and/or formalized?

How will you help all the partners understand the coalition and their role?

5. Will you create guidelines or a Memorandum of Understanding to help bring partners together?

What will those documents cover? For example, what will happen if one of the partners do not following through in their actions (i.e. not attending meetings or engaging stakeholders)

6. What if the partner initially says no to joining the coalition? How will you move them to yes?

7. Think about how these partners working together will help each organization?

How will it help you meet the goals for your issue?

How will it help the community? Name 2–5 mutual interests.

8. What challenges do you anticipate? For example, are there competing interests because of grant funding?

Are there organizations working against each other on other issues?

Are there potential or current partners that do not get along with others on this list?

What will you do to overcome these challenges?

4. Communication—

Internal communication

Internal communication is the information that is shared within your coalition. Depending on your structure, you may have different levels for a core decision making team or action team members. Be thoughtful in your internal communication—don't communicate for communication sake—your coalition members will thank you

1. How often does the coalition communicate with stakeholders?

2. What needs to be communicated?

3. How does the communication happen? (i.e. email to a listserv? Blog? Monthly calls? Quarterly in-person meetings?) Provide a rationale for this based on how you think your audience will best receive the information.

4. What do you want people to do as a result of the communication?

5. Who will send out internal communication?

TIPS FOR EFFECTIVE COMMUNICATION:

- a. Be concise and to the point.
- b. Not everyone needs the same type of information or level of detail. For example, someone in leadership may need to be communicated with more often than a volunteer. A spokesperson may need general information at their fingertips about “why early childhood matters” while you may send out more detailed information to the core leadership team.
- c. Use a chart to keep track of who needs to know what and when they receive it.



External communication

External communication are the messages that go out into the world Again, you want to be thoughtful about who is targeted, what is said, and when it is communicated.

1. Who do you want to know about your project (target audiences)?

2. What do you want them to know?

3. What have been the most effective messages used to date?

4. How can messaging be improved?

5. Who are the appropriate messengers for delivering the messages to the target audiences?

6. How will they deliver the message? (e.g. face to face meeting, presentation, email, social media, etc.)

7. What are the potential barriers for getting the right messages out externally?

8. What documents or information (collateral) would be helpful to communicate with target audiences?

5. Understanding the Environment

Understand the environment in which you work to help determine your coalition's activities and how it might evolve.

1. Does the coalition have data and information about your issue and the population it affects? (young children, families, workers, businesses, etc.)

2. Who are the coalition's allies?

3. How can you work with them to achieve mutual goals?



6. Tracking progress

Think through what success means to the coalition. Understand the effectiveness of your actions and where you fall short to be able to course correct along the way.

1. How will you know if your coalition is successful?

What are the coalition's benchmarks?

2. How often will you track the coalition's progress?

3. Are there external requirements for the coalition to be evaluated? (e.g. some funders require evaluations)



4. How will you assess and improve your coalition's operations?

5. With whom will you share this information, if anyone?

7. Resources

Use these ACS tools to help you build your coalition:

- ▶ **Collaboration Glossary of Terms**
https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Collaboration_Glossary_7_5.pdf
- ▶ **Network Mapping**
https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Network_Mapping.pdf
- ▶ **Giving Jargon the Boot**
https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Giving_Jargon_the_Boot_2-1.pdf
- ▶ **Assess Your Collaboration**
https://www.advocacyandcommunication.org/wp-content/uploads/2018/04/ACS_Assess_Your_Collaboration-75.pdf