I.   Outline

A.   What can coalitions do that single organizations cannot (or why form a coalition)?

1.   Demonstrate breadth and diversity of interests/people impacted by a policy proposal

   1.   Grassroots can contribute real life stories/ professionals contribute policy ideas and background. Grassroots benefit from professional advice and assistance

2.   Pool collective resources

3.   Coordinate strategy

   1.   Ex. include: Legislative visits, media work, targeted phone calls, social media, rallies, grassroots empowerment and recruitment

4.   Speak with one voice from many perspectives

B.   Building effective coalitions

1.   Know thyself

   a)   *What kind of coalition is it?*

      1.   Grassroots (a collective of individuals or families, SAVE IRIS)

      2.   Coalition of organizations (LTC Coalition, Survival)

      3.   Combination (organizations, individuals are members)

   b)   *Who does each Coalition partner represent (members, audience)?*

      1.   What is the importance of the issue to those members (high, medium, low)?

      2.   Are there differences of opinion about the issue or differences on how the issue will impact members/individuals within the organization

      3.   What level of engagement has each partner previously had on the issue (high, medium, low)

   c)   *What are each coalition partner's priorities/values,*

   d)   *Are there coalition members whose values conflict?*

   e)   *Are their coalition members whose organizational priorities are different or whose priorities on the issue are different?*

f) *Are their coalition members who are directly connected to people/families with lived experience who will be impacted by policy change? Are people with lived experience equally participating members of the coalition itself?*

g) *Are their coalition members that have worked with each other before on other issues? What are those working relationships like?*

h) *Are there people or organizations missing from the coalition?*

i) *What is each coalition member willing to contribute to the group?*

1. Relationships/Access to decision makers, media etc.

2. Relationships/Access to grassroots

3. Staff Time and Talent (policy analysis, media work, graphic design, web/social media work, information gathering or research, lobbying, strategic planning, grassroots organizing, event planning etc.)

4. Communications Infrastructure (use of member databases, social media networks etc.)

5. Financial resources

6. In-kind donations (space, materials, etc.)

7. Organization's name and credibility (willing to publicly sign on to coalition efforts)

2. Know thy goal, strategy, and capacity

a) *What policy change is the coalition is trying to achieve?*

1. Is it proactive (a change the group is pushing decision makers to do) or

2. reactive (a change proposed by decision makers that the group wants amended or not done at all)

3. What is the perceived level of effort needed to achieve the goal (high, medium, low)

4. If the coalition wins/loses what will be the impact (high, medium, low) on the people the coalition members represent? Will the impact be positive or negative?

b) *Know thy strategy*

1. Is there agreement on what the problem is that decision makers are trying to solve?

2. Is there agreement on solution(s) to the problem

3. Who are the decision makers that must be influenced (state or federal agency, Governor, state legislators, Congressional delegation, others)

4. What are the resources/capacity/actions necessary to influence those decision makers?

5. What is the timeframe in which decision makers must be influenced?

c) *How quickly can each member respond to the coalition's needs in the context of their other work?*

1. Do they need permission from a board of directors for certain decisions?

2. Can they hire or shift staff to focus on this issue or will work be an add-on to existing work?

3. How experienced/comfortable is the coalition member with advocacy work? Is there a learning curve for the organization?

C.   Key Characteristics of effective coalitions

1.   Clear agreed upon goals and purpose

1. "we seek to influence X".

2. Members are invested in the common goal and are willing to collaborate

2.   Meetings result in development of coalition strategy and action items

1. Creates specific action steps, work assignments for members, and deadlines for products/action

2. The work of the coalition happens outside of meetings. The meeting determines what the work is. The meeting itself is not work.

3.   The coalition continually assesses its strategy and makes adjustments

1. They are willing to try creative or new approaches to persuade decision-makers

2. Coalition explores and draws from a variety of tools (social media campaigns, video stories, media work, etc.) and engagement of many influencers (including grassroots) to advocate on multiple fronts over time.

4.   There is dedicated and consistent leadership

1. Leaders steer the group, make sure everyone is heard, and make sure there is consensus on coalition action steps.

2. Leaders do not dictate what the coalition does/does not do and do not do all the coalition's work.

5.   Engagement of grassroots

1. Coalition includes efforts to provide plain language explanations of the policy, potential impacts, public policy process, and specific action steps grassroots can take to further advocacy goals.

2. Coalition members leverage their own grassroots networks to amplify coalition messages and request action.

3. Coalition includes recruitment and empowerment/support of new grassroots members in its strategy

6. Ability to work with decision-makers affiliated with either political party and non-partisan professionals to accomplish policy goals

7. Willing to be persistent and maintain vigilance/continuity on the issue over time

II. Know Thy Coalition Pitfalls

A. Common problems coalitions encounter

1. Many people at the table, few people doing all the work

    1. Coalitions collaborate and pool collective resources together to get more done. There is no leveraging of increased capacity when most members of the coalition do not contribute to the actual work.

    2. Coalitions that rely on a few workers inherently have longer response times (as workers must fit in coalition work in addition to their organization's priorities). Worker members may burn out.

    3. Often accompanied by non-contributing coalition members critiquing, re-discussing, or attempting to re-do finalized work product.

2. Many meetings, much discussion, no action steps

    1. Information sharing is not an end unto itself, and it is not advocacy.

3. Meeting agendas resemble a long laundry list

    1. Seeking to cover many separate (and sometimes unrelated issues) guarantees that no topic is fully addressed.

    2. Danger signs: the meeting ends with some agenda items not having been discussed at all; the meeting ends with some or many agenda items having rushed or truncated discussions; the meeting ends with decision-making having been deferred to the next meeting; the meeting ends with no discussion of strategy or action steps.

4. The coalition is unable to prioritize issues and workload

1. There is a need to assess the political landscape and determine where the opportunities are to make progress. Not all ideas/issues are equally feasible or important all the time.

2. Prioritizing what work products (surveys, research, meetings, media work etc.) are needed to achieve the desired policy outcome is essential. Often coalitions do what they are comfortable doing, rather than investing effort in the right places.

5. Coalition members are focused on discussing the problem, without proposing any solutions

1. Public policy is about change. Someone is already proposing a solution you don't like for a real or perceived problem. How would you solve the same problem in a different way?

6. Coalition members stay in their comfort zones

1. Talking only with each other and with people who already agree with you will not help change public policies proposed by decision-makers who do not share your point of view.

2. Similarly, professionals (e.g. policy analysts, grassroots organizers, social workers) need to interact with people from different professional backgrounds who have different perspectives and skillsets to contribute to a coalition strategy (this includes people with lived experience/grassroots).

7. Many people at the table, few members contributing their perspective and participating in development of strategy

1. Non-participatory members may feel like they are not being heard (although we own it is every member's responsibility to speak up), and as a result do not work for the coalition

2. A few loud voices may dominate the discussion and drive the strategy without buy-in of the coalition, which can weaken the collation or make it a "paper tiger"

8. One or two Uber coalition members seek to dominate and direct the priorities and work of the coalition

1. If one coalition member has given money, space, or something else considered "big" that other members do not have the capacity to give, that should not mean that they are purchasing disproportionate influence over the coalition.

9. A strategy exists, but inertia means the outcome is: nothing

1. When coalition members don't do the work or the action steps, the best laid plan is just a plan.

10. **Failing to seek out and build relationships with grassroots and decision-makers over time**

   2. A coalition with too few members that are willing to build new relationships will stay small, remain stunted, and runs the risk of being politically marginalized.

11. **The coalition cannot recognize or celebrate small victories**

   1. No one gets their full way all the time. Public policy work often means having incremental victories that are far removed from the ideal outcome the group is seeking.

B.   Addressing common coalition problems

1.   Running meetings

1. One person should lead the meeting and keep order (one person talks at a time, everyone has an opportunity to participate, drives group through the agenda).

2. Keep agendas short, and focused on key topics.

3. Agenda items should drive discussion and orient meeting participants towards the public policy goals/outcome the coalition seeks to achieve.

   (a)   The agenda can help prioritize issues. Initial coalition meetings may spend more time assessing what items are important/unimportant to focus time on; agendas can help reinforce those decisions.

   (b)   If a policy problem is identified, make sure the group discusses their ideas on how to solve the problem. If the group has no solutions, table further discussion of the problem.

4. Devote the majority of meeting time to developing strategies. Updates should be brief and directly inform the strategy discussion.

5. Each meeting should result in action steps that execute the group's strategy. Action steps should be specific (what is to be done), have a deadline, and have person(s)/organization(s) assigned to do them.

6. Each coalition member should be directly asked how they will contribute to the execution of action steps.

   (a)   Can they donate professional staff time (to do research or policy analysis, graphic design, communications work, legislative work, etc.)

   (b)   If grassroots is needed, who will they reach out to and how? What do they need to make the ask (communications message etc.)?

7. Strategy and workload should be assessed and adjustments discussed at each meeting.

2. Handling disagreements among members on strategy

1. Uncover the core reason for the disagreement. Frequent reasons for disagreement on strategy include:

    (a) ***Different reading of the political landscape***
    how likely is a policy change to occur, who are the players that want it to happen and are they in positions of influence, and what are the mechanism(s) that can be used to further policy change.

    (b) ***Differing sense of urgency****, estimation of the timeframe in which advocates have to act to influence policy*

    (c) ***Differing comfort levels****. Is delaying action and other "wait and see" approaches because of member's reluctance to commit to an organizational opinion, discomfort with contacting policy makers, lack of relationships with policy makers or grassroots, or established relationships (sometimes through contract) with policy makers or regulators that a member feels could be threatened if actions are taken?*

    (d) ***Limited capacity****. Is the level of work required above what some members are willing or able to contribute? Is there a skills deficit (i.e. elements of the strategy require work that no member is able to do, dedicate staff to do, or hire done)?*

    (e) ***Previous experience or expertise.*** *Members successes/failures in the past may influence what they are willing to try in the present; members also may offer what they know they can give (whether those are the right tools for the strategy at hand is a different question.*

2. Focus on the policy outcomes the coalition desires to achieve. How does the proposed elements of the strategy help achieve those outcomes?

3. How does the coalition make decisions? Does there need to be complete agreement among all members, consensus among majority of members (all members or those in meeting attendance), is there a subgroup (steering committee or chairs) delegated authority to make decisions?

4. Are some members willing to take the lead on parts of the strategy on behalf of the entire coalition? There are legitimate reasons why organizations may not be able to participate in certain types of work or want to work behind the scenes without putting their names onto public work product.

5. When there are differences of opinion on strategy, is there agreement that no coalition member will undermine whatever strategy the coalition has agreed to?

3. Reassessing current strategy and rebooting if necessary

1. Coalitions should routinely assess their current strategies and readjust when necessary.

    (a) *Policy work can be fast moving, and the best approach to influencing the outcome may change from week to week, day to day, even hour to hour. If what the coalition is doing is working, keep doing it. If it's not, be open to trying new approaches.*

4. Addressing workload, and being realistic about coalition capacity

1. Do some resource mapping of the coalition.

    (a) *For organizational members, how does the mission/charge (statutory authority if applicable), membership/grassroots base influence the perspective/voice of the organization on the issue.*

    (b) *Ask each coalition member to identify staffing and staff time, skill sets (e.g. policy analysis, organizing, communications, graphic design etc.), in-kind contributions (space, equipment, graphic design, printing, etc.), funding, relationships (legislative, agency, media, member, grassroots) they have, social media networks etc.*

    (c) *Where are the overlaps (many members can contribute) and deficits (few or no members can contribute)?*

    (d) *Do members have restrictions or challenges to contributing to the coalition (restrictions on use of grant funds, certain times of year that redirect staff and other resources, etc.)?*

2. Assess what resources each member is willing to contribute to the coalition, then assess the collective capacity of the coalition.

    (a) *This exercise should be done periodically. Policy work can shift in intensity, and can be fast or slow. What members are willing (or able) to contribute may shift over time or increase/decrease depending on the time of year.*

3. Are some members contributing disproportionally more? Is this ok?

    (b) *Does the coalition expect all members to contribute?*

    (c) *What constitutes contribution? What is the minimum expectation for each member?*

    (d) *How does the coalition address low contributing or non-contributing members ("information gatherers")?*

5. Minimizing and handling burnout

1. It's ok to decide that there are issues the Coalition will not work on.

    (a) *No one can do everything. Make sure the issues the Coalition takes on are connected to their overall focus and policy goals, fit the scope of their role, and are within the group's capacity to do.*

2. Create a pathway for new people to become advocates.

   (b) *Grassroots recruiting should lead to a larger and more sophisticated group of local advocates who are experts in how the issue impacts their life experience. How does the coalition support and grow local advocates to take on increasing roles and develop public policy skills?*

3. Create opportunities for individuals and organizations to take on new and progressively more active advocacy roles

   (c) *Coalition work can be a platform to have seasoned staff work with those looking to gain experience. Growing more effective advocates helps distribute and ease workload.*

4. Support local advocates (and organizations) to speak with their own authentic voices.

5. Build capacity in areas where the Coalition is deficient.

   (d) *For example, if every member has a public policy staffer that is an expert on the issue, policy analysis is not a capacity building priority; it's already a tool the coalition can leverage. If few or no members have public policy analysis capability it is a needed investment.*

6.   Continuing coalition work

1. Define success.

   (a) *What does complete victory look like? Stopping a bill from passing does not mean the same ideas will not be introduced again. Likewise, the "perfect policy" may be changed in the future.*

   (b) *What are the smaller wins that make progress towards policy goals?*

   (c) *Are there new issues or additional policy goals that the Coalition can work on that will benefit members' interests?*

   (d) *Is there capacity, infrastructure, relationships that should be maintained for future partnerships?*

2. Celebrate small victories and reflect on what went well, in addition to ideas for improvement.

3. When Coalition's work does not result in the desired outcome, regroup and develop a long-term strategy to influence the public policy.