THE SECRET SAUCE: COALITIONS

MCN ANNUAL CONFERENCE
OCTOBER 24-25, 2019
GOOD MORNING
IT’S TIME TO TAKE A STAND!
AGREE OR DISAGREE
TAKE A STAND:
I LOVE THE STATE FAIR
TAKE A STAND: ST. PAUL IS BETTER THAN MPLS
TAKE A STAND: I AM A MORNING PERSON
TAKE A STAND: I PREFER THE BEACH TO THE MOUNTAINS
TAKE A STAND: I LIKE WORKING IN COALITIONS
TAKE A STAND: I LEAD OR HAVE LED A COALITION
WHO ARE WE
IN THE NEXT 30-45 MIN...

I. Talk about the research
II. Compare our various coalitions
III. Share our tips (not in the research)
IV. Strive to engage you along the way
WHAT DOES THE RESEARCH SAY?
JARED RAYNOR, TCC GROUP

TCC Group Team and Acknowledgements
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WHAT’S A COALITION?

“An organization or organizations whose members commit to an agreed-on purpose and shared decision making to influence an external institution or target, while each member organization maintains its own autonomy.”

IT’S A STRATEGY

Forming a coalition is a means to an end.

Something advocacy organizations do in order to achieve something else.
IN YOUR EXPERIENCE, WHAT ARE THE BENEFITS AND COSTS OF JOINING A COALITION?
Table 1

Benefits and Costs of Membership in a Coalition

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Networking</td>
<td>Time</td>
</tr>
<tr>
<td>Information Sharing</td>
<td>Loss of Autonomy</td>
</tr>
<tr>
<td>Access to Resources</td>
<td>Compromise</td>
</tr>
<tr>
<td>Resource Pooling</td>
<td>Expendng Scarce Resources</td>
</tr>
<tr>
<td>Involvement in Important Cause</td>
<td>Unfavorable Image of Association</td>
</tr>
<tr>
<td>Shared Mission</td>
<td>Lack of Direction</td>
</tr>
<tr>
<td>Ability to Attain Desired Outcomes</td>
<td>Reduced Visibility/Recognition</td>
</tr>
<tr>
<td>Enhanced Visibility/Power in Numbers</td>
<td>Negative Exposure</td>
</tr>
<tr>
<td>Enjoyment of Coalition Work/Camaraderie</td>
<td>Middle-Ground Tendency</td>
</tr>
<tr>
<td>Personal Recognition</td>
<td>Obscured Voices</td>
</tr>
<tr>
<td>Ability to Build Skills</td>
<td></td>
</tr>
</tbody>
</table>
KEY CHARACTERISTICS: IT’S ALL ABOUT CAPACITY

1. Capacity of Coalition Members
2. Capacity of the Coalition
3. Outcomes/Impact of the Work of the Coalition
“A coalitions capacity is inherent in the collective capacity of its members”
WHAT MAKES EFFECTIVE MEMBERS?

IN YOUR EXPERIENCE, WHAT ARE SOME KEY CHARACTERISTICS THAT MAKE EFFECTIVE COALITION MEMBERS?
Capacities of Effective Coalition Members.\textsuperscript{11}

- Skills/knowledge to work collaboratively
- Commit to the coalition in action as well as name
- Ability to articulate what you bring to the table (e.g., time, resources, access, relationships, reputation, expertise, etc.)\textsuperscript{12}
- Ability to articulate what you want from the table
- Ability to weigh the value of coalition membership against scarce resource expenditure
- Willingness to share resources
- Willingness to openly identify conflicts between the individual organization and the coalition
- Willingness to share power/credit
- Willingness to speak as one
- Willingness to explore alternative ideas and approaches
- Willingness to dedicate staffing at a high enough level to make decisions
- Willingness to dedicate staffing to implement assigned tasks
- Strategic use of coalitions to fill critical gaps and leverage resources toward achieving your mission
- Willingness to commit to the coalition for an extended (relevant) period of time
- Understanding of how your issue fits into a broader network of issues
HAVES
VS
WANTS
CAPACITY OF THE COALITION
WINDOW OF OPPORTUNITY – LUCK OR STRATEGY?
LOGIC MODEL

CRITICAL ORGANIZATIONAL CAPACITIES FOR COALITIONS
4 CENTRAL CHARACTERISTICS

1. Leadership Capacity
2. Adaptive Capacity
3. Management Capacity
4. Technical Capacity
CULTURAL CAPACITY / CHARACTERISTICS

“Unique history, language, structure, and set of values and beliefs. These elements all serve as the context through which organizations define, assess and improve their effectiveness.”

1. Trust
2. Respect
3. Safe Dissent
4. Unity
5. Sensitivity to Power Differentials
Figure 5: Critical Organizational Capacities for Coalitions: The Logic Model “Inputs”

Leadership:
- Shared purpose and vision
  - Common goal destination
  - Clear value proposition
- Formalized set of rules/procedures
- A “core” leadership team
- A commitment to action
- Transparent decision-making processes
- Strategically developed and engaged membership

Management:
- Frequent and productive communications
- Facilitate language differences (e.g., translation, definitions, etc.)
- Managing member participation
- Deliver on reciprocity/expectations
- Clear task and goal assignments
- Clarity around member and staff roles
- Ability to manage conflict
- Careful recordkeeping

Adaptability:
- Ability to monitor the advocacy policy environment
- Effective and action-oriented planning
- Ongoing monitoring and evaluation
  - Measures of goal destination
  - Measures of value proposition
  - Measures of “positive externalities”
- Membership assessment
- Procurement of resources (both in-kind and financial from coalition members and external sources)
- Foster inter-member non-coalition collaboration

Org. Culture: Trust; Respect; Safe Dissent; Unity; Sensitivity to Power Differentials

Key Resources:
- Technical:
  - Appropriately diverse membership
  - Coalition staffing (as strategically deemed appropriate)
  - Communication skills
  - Policy/advocacy expertise
  - Tangible nonhuman resources (as strategically deemed appropriate)
    (e.g., space, equipment, funding, etc.)
  - Resource development skills

Access window of opportunity/threat:
- Offense
- Defense

Initiative Logic Model

- Issue analysis/research
- Media advocacy/Public awareness raising
- Grass roots organizing
- Coalition building/networking
- Policy analysis/research
- Legal action
- Lobbying and direct policy-maker influence
- Administrative/Regulatory implementation influence

Improvement in the Quality of Living for the Community
Leadership Capacities:

- Shared purpose and vision
- Common goal destination
- Clear value proposition
- Formalized set of rules/procedures
- A "core" leadership team
- A commitment to action
- Transparent decision-making processes
- Strategically developed and engaged membership

Management Capacities:

- Frequent and productive communications
- Facilitate language differences (e.g., translation, definitions, etc.)
- Managing member participation
- Deliver on reciprocity/expectations
- Clear task and goal assignments
- Clarity around member and staff roles
- Ability to manage conflict
- Careful record-keeping

Adaptive Capacities:

- Ability to monitor the advocacy policy environment
- Effective and action-oriented planning
- Ongoing monitoring and evaluation
- Measures of goal destination
- Measures of value proposition
- Measures of "positive externalities"
- Membership assessment
- Procurement of resources (both in-kind and financial from coalition members and external sources)
- Foster inter-member noncoalition collaboration

Technical Capacities:

- Appropriately diverse membership
- Coalition staffing (as strategically deemed appropriate)
- Communication skills
- Policy/advocacy expertise
- Tangible non-human resources (as strategically deemed appropriate) (e.g., space, equipment, funding, etc.)
- Resource development skills
WHO'S THE DECIDER?

WHAT TYPES OF DECISION-MAKING MODELS HAVE YOU EXPERIENCED?
WHAT ARE THE PROS AND CONS OF CONSENSUS DECISION-MAKING
### Table 2
Pros and Cons of Consensus Decision-Making

**Pros:**
- Increases Commitment
- Empowerment
- Participation
- Overcome Resistance to Change
- General Satisfaction with Decisions
- Builds Morale
- Theoretical Message of Equality

**Costs:**
- Difficulty Defining Specific Tasks
- Slow/Time-Consuming
- Waiting to take action until all have spoken rather than when a decision has been made
WHAT NOT TO DO

WHAT ARE CHARACTERISTICS THAT CAN CAUSE COALITIONS TO BE LESS EFFECTIVE?
Seven Deadly Sins of Coalitions

• Debate to Death: Nitpicking and nuances every bit of information or potential action resulting in a bias for arguing over action.

• Social Orientation: Commitment to the group as a group rather than the group as a vehicle for action with a clear goal destination and value proposition.

• Avoidance of Conflict: Mask dissent or disagreement in order to create harmony at the expense of thoughtful vetting and buy-in. One of the most valuable roles that a coalition can play in today’s policy environment is to uncover sticking points and resolve them within the coalition as opposed to airing grievances publicly.

• Lack of Technical Expertise: Feeling that the coalition is a substitute for specific technical knowledge on things such as policy and advocacy work, fundraising, evaluation, etc. A coalition, in and of itself, is not advocacy, but rather a tool for generating effective advocacy. Coalitions need the skills and ability to conduct advocacy activities, which may be contributed by coalition staff or individual coalition members with specific advocacy skills (e.g., lobbying, grassroots mobilizing, media engagement, judicial intervention, etc.).

• Turn it Over to the Staff: Members play a passive role, leaving the work of the coalition in the hands of staff members (who might be employed by the coalition or dedicated staff from member organizations).

• No Ongoing Role for Members: Members in the coalition don’t have specific tasks or assignments over time.

• Dividing up Credit: As the coalition makes gains, members try to take individual credit for success over the coalition (“I did more than you and am therefore more responsible.”).
<table>
<thead>
<tr>
<th><strong>MN Smoke-Free Generation</strong></th>
<th><strong>Minneapolis Menthol Coalition</strong></th>
<th><strong>Breathe Free North</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>20 → 60 members Statewide Orgs Professional</td>
<td>50 members Smaller CBOs Scrappy</td>
</tr>
<tr>
<td>Success</td>
<td>Smoking Ban Tobacco Taxes E-cig Regulations</td>
<td>Citywide Menthol Restrictions (National Leader)</td>
</tr>
<tr>
<td>On-going problem OR One-time goal</td>
<td>On-going</td>
<td>One-time (but could be resurrected)</td>
</tr>
<tr>
<td>Leadership Decision-making</td>
<td>Strive for consensus but steering committee to vote if needed</td>
<td>Executive decision-making with coalition input</td>
</tr>
<tr>
<td>Adaptability</td>
<td>YES State &amp; Fed</td>
<td>YES City &amp; Wards</td>
</tr>
<tr>
<td>Management</td>
<td>Co-chairs Paid staff Accountability</td>
<td>Co-chairs with complimentary skills sets</td>
</tr>
<tr>
<td>Technical: Resources</td>
<td>Strategy Tech expertise (lobbying, paid media, comms)</td>
<td>Subcontracts to engage diverse memberships</td>
</tr>
</tbody>
</table>
IN OUR EXPERIENCE...
TIPS FROM BETSY

• Decide on your deal-breakers upfront.
• Prioritize your work.
  – Even with the best coalition, you can’t do it all.
• Give yourself a break. Take time to recharge.
• Find a friend.
• Learn from failure.
TIPS FROM LATRISHA

• The window of opportunity might not be perfectly clear.
  – Trust your gut
  – Lean when to go for it and when to pump the breaks
  – When to PUSH your decision-makers and when to STOP

• Use your “downtime” in between campaigns to tend the garden.
  – Build your coalition base
  – Evaluate
  – Research the next campaign

• Bringing diverse representation to the table is an art.
  – Funding
  – Relationships and Trust
  – Authentic Participation
TIPS FROM MOLLY

• Start with a community builder.
• In addition to the work, provide a unique hook.
• Give participants something they don’t get in their day-to-day.
• Define the meeting purpose and stick to your agenda.
• Encourage and cultivate participation from all.
• When needed, find an outside facilitator to move through process.
• Recognize individual efforts and celebrate collective successes.
THANK YOU

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