2021 Coalition-Building Learning Series

This webinar is being recorded.
Your hosts for today’s session is Caleb Stephens and Cathy Cooper, WaFd Bank

WELCOME!

This webinar is being recorded.
Today’s Topic: Tools and Strategies for Effective Coalitions and Collaboratives
Welcome

Fran Rosebush Baylor
VP, Partnerships, Field Engagement & Policy at Prosperity Now
## What Makes an Effective Coalition?

<table>
<thead>
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Warm up question

What are 1-2 words you associate with being in a coalition or collaborative?

Please share responses in the chat box as you feel comfortable.
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<tr>
<td>Coalition</td>
<td>Commitment to cooperate for common cause consistent with self-interest</td>
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<tr>
<td>Collaborative</td>
<td>More intentional than coalition, collective determination to reach shared objective, often creative in nature</td>
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<td>Membership association</td>
<td>Leadership directly reflects member priorities, emphasizes benefits in exchange for dues</td>
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<td>Campaign</td>
<td>Time-limited endeavor, focused on a specific goal</td>
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<td>“Movement-Oriented” Network</td>
<td>More open structures, shared ownership and leadership dynamic, tied to larger social movements</td>
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<td>“Referral” Network</td>
<td>Streamlines recruitment and service delivery across multiple agencies</td>
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<tr>
<td>Partnership</td>
<td>Formal agreement to deliver on specific projects or initiatives</td>
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Coalitions Serve Different Purposes

- Information and resource sharing
  - Examples: newsletters, webinars, listservs, trainings, networking at coalition meetings, disseminating research/ promising practices

- Coordinating and streamlining services community-wide
  - Examples: VITA networks, shared referral system, financial coaching network, bundling services for clients at a common location

- Policy advocacy
  - Examples: coordinating comment letters, issuing action alerts, meeting with an agency rep, developing talking points for members to call policymakers
Coalitions are Effective When They Reflect Community Needs and Priorities

Community Needs and Perspectives Should Be Central
✓ Community concern
✓ Existing solution is inadequate or non-existent
✓ Need for a shared response

Opportunity and Timing
✓ Change in political environment or leadership
✓ Sympathetic champions (media, funders, etc.)
✓ Program funding opportunity
✓ Policy solution is up for renewal or debate

**TOOL:** Prosperity Now Scorecard and local data can be found at [https://scorecard.prosperitynow.org/](https://scorecard.prosperitynow.org/).
Building a Theory of Change— your WHY and HOW

A Theory of Change is a planning tool that helps your coalition …

▪ Develop your strategy
▪ Clearly explain/illustrate coalition concepts and approach for key stakeholders
  ▪ Funders
  ▪ Potential allies
  ▪ Each other
Network Members have greater political power

Network Members have greater capacity to deliver services

Network Members learn from each other

Network Members use knowledge to improve programs

More, better, more effective asset-building programs and products

Financial capability and asset-building approaches embedded into other systems

Policies adopted that encourage asset-building; policy disincentives removed

Network Members build alliances with others

Network Members act strategically to take advantage of opportunities

Network Members advocate as constituents

Engage Members in Policy Advocacy

Build connections and resources available to Network Members

Build Network Member knowledge and capability

Families are financially secure and have skills, supports and opportunities to improve economic position

Dramatically expanded opportunities to save and build assets

ULTIMATE GOAL

LONG-TERM OUTCOMES

INTERMEDIATE OUTCOMES

NEAR-TERM OUTCOMES

STRATEGIES
Advocate for policy change
✓ Advocate for administrative and legislative policies
✓ Provide TA to state agencies

Build member service delivery and advocacy capacity
✓ Share best practices
✓ Facilitate peer learning opportunities
✓ Provide TA to nonprofits
✓ Conduct advocacy trainings
✓ Develop shared metrics for program evaluation

Connect stakeholders statewide and nationally
✓ Create/maintain state directory of programs
✓ Ongoing outreach to diverse stakeholders
✓ Regularly communicate with members on opportunities, actions, information, etc.
✓ Leverage national Assets & Opportunity Network for learning and advocacy resources and to enhance impact

Raise awareness
✓ Outreach to media and consumers
✓ Educate funders
✓ Conduct and disseminate research on need and efficacy of asset-building/financial capability

Activities

Short-Term Outcomes

Prospects for asset-building/financial capability services have more funding
✓ Funders know about and support asset-building/financial capability activities

Policy influencers have greater awareness and take action on asset-building/financial capability issues
✓ Reporters write more stories
✓ State administrators understand how to integrate into their programs
✓ More legislators introduce and support legislation

Programs offering asset-building/financial capability services have more funding
✓ Funders know about and support asset-building/financial capability activities

Effective asset-building and financial capability programs and services are available statewide
✓ Programs meet the needs of the diversity of asset-poor families and individuals

Coalition members have greater capacity, skills and knowledge
✓ Coalition members are more engaged in advocacy
✓ Coalition members are seen as experts

Coalition is strong, vibrant and active
✓ Increased networking and collaboration among coalition members
✓ Coalition is diverse and reflects constituencies across the state

State policies support asset-building and financial security
✓ Legislation is adopted
✓ State agencies integrate asset-building/financial capability into programs
✓ Policies reflect and ameliorate lived experiences of asset-poor families and individuals

All families and individuals in Connecticut can capably navigate the financial marketplace and have the opportunity to build wealth, thus reducing wealth and income disparities and fundamentally improving life chances for disadvantaged Connecticut residents

These are for your shorter-term to-do list
Time-limited activities necessary to create fully functioning coalition
✓ Define/refine coalition mission, goals, outcomes
✓ Develop membership and committee structure
✓ Raise funds for staffing
✓ Develop policy agenda

WHY

Vision

HOW

Change you seek to make
Why Do We Engage in Coalitions?

<table>
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<tr>
<th>Benefits</th>
<th>Costs</th>
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<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>Expending scarce resources</td>
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<tr>
<td>Involvement</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 working with others</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>
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</table>

Source: “What makes an effective coalition?” by the California Endowment
Effective Coalitions Are Inclusive

Effective coalitions make room to value and respect differences in cultural, economic, social and programmatic perspectives and experiences.

✓ Are made up of members and partners reflective of the community served
✓ Explicitly name social justice as a key element of their work
  ○ Is reflected throughout their goals and priorities
✓ Foster a participatory process where all stakeholders have equal say in achieving goals

TOOLS:


@ProsperityNow
prosperitynow.org
Getting the Right People at the Table
Who do you have with you? Who do you need?

HELPFUL IN REACHING GOALS

MORE HELPFUL/IMPORTANT

MORE ALIGNED
Helpful in reaching goals:

- Malloy Administration
- Municipal Leaders (mayors, etc.)
- Insurance Companies
- DOL Foundations
- DCF
- Community Colleges & Workforce Skills
- Workforce Organizations
- Providers
- Faith Groups
- Legislative Champions
- BRS
- Bank X
- Citizens United
- DSS
- DMHAS
- Business
- State Legislators
- Universities & Colleges
- Department of Development Services
- State Department of Education
- State Department of Housing
- Legal Services
- Affordable Housing
- Other Providers
- Innovations for Poverty Action
- AAA/ADRC
- CT Community Providers Association
- CT Community Connection
- Workforce Organizations
- State Department of Education
- Workforce Organizations
- State Department of Housing

Make priority for engagement:
- Work to move into alignment
- Already with you, make sure they’re on board

Helpful in reaching goals:

- Make priority for engagement
- Work to move into alignment

Alignment:

- More aligned
- More helpful/important
Moving Coalition Ideas into Action

- Coalition members believe they can achieve more together

- Effective coalitions have:
  - A structure that moves work forward and shares leadership
  - Dynamic, productive and well-facilitated meetings
  - Effective communication between meetings
Asset Building Coalition: Activities, Outcomes, Vision

Activities

Connection: Increase connectivity between service providers

Partnership: Develop cross-sector partnerships

Capacity: Increase the capacity of network members

Funding: Identify and educate funders about asset-building approaches to poverty alleviation

Awareness: Increase awareness of asset poverty and solutions to address it with key influencers and the public

Advocacy: Advocate for policy change and effective implementation

Short-Term Outcomes

Service providers are better networked

Multiple sectors work together toward solutions

Network members have greater capacity to deliver services and advocate for policy change

Funder perception of poverty changed

Funding for programs increased

Media coverage of poverty issues includes recognition of need for financial capability and assets

Individuals facing financial insecurity and asset poverty and engaged in advocacy

Long-Term Outcomes

More and better financial capability and asset-building services are available

Better financial products exist for asset-poor families and individuals

Influencer and public perception of poverty changed

Network members act as advocates for policy change

Policies are effectively implemented

Families and individuals have greater confidence, social capital, and financial capability

Policies change to support building financial capability, asset building, and consumer protections

Fewer people are financially insecure

Savings, wealth, and assets increase in vulnerable communities

Impact

All families and individuals in Nevada financially secure, can capably and confidently navigate the financial marketplace, and have opportunities to build wealth, thus reducing income and wealth disparities and fundamentally improving life chances for disadvantaged Nevada residents
<table>
<thead>
<tr>
<th>Concrete activities for next 6 months</th>
<th>What needs to happen</th>
<th>Structure for getting it done</th>
<th>Who will help</th>
<th>Immediate next steps</th>
</tr>
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<tr>
<td>1. Host regional meetings</td>
<td>Schedule and plan logistics of regional meetings in the north and south</td>
<td>Ad hoc planning committee</td>
<td>Confirm interest and recruit others: 1. Edith 2. Jeannette 3. ? 4. ?</td>
<td>For example... 1. Set up call to ID tasks, divide responsibilities 2. Identify: regional meeting dates, times, locations 3. Explore resources available to cover costs 4. Create invitations the regional meetings</td>
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<td>Create a compelling meeting agenda—Ideas for topics: • Sharing what the NABC is • Building up interest in Feb 6 event • Educating on policy agenda development • Creating ways for attendees to share their work with each other</td>
<td>Interim Steering Committee</td>
<td>Confirm interest and recruit others: 1. Nancy Brown 2. Michele 3. Nancy Brune 4. Edith 5. ? 6. ?</td>
<td>For example... 1. Set up planning call 2. Use Theory of Change to identify goals for the regional meetings 3. Develop agendas for the meetings, identify speakers, and determine what materials are needed</td>
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<td>Outreach/invite attendees to regional meetings</td>
<td>Outreach committee: pulled from Planning committee &amp; Interim Steering Committee</td>
<td>Confirm interest and recruit others North outreach: Edith Jeannette Michele ?</td>
<td>For example... 1. Use list of brainstormed potential partners to identify groups to invite</td>
</tr>
<tr>
<td>2. Leverage ALC in Sept 2014 to build relationships w/ peers in NV &amp; A&amp;O Network Lead Orgs nationally</td>
<td>Participate in the A&amp;O Network Leadership Intensive • Participate in Hill Visits • Debrief after ALC to identify takeaways to share w/ whole coalition</td>
<td>Ad hoc ALC delegation</td>
<td>14 attendees already registered from Nevada</td>
<td>For example... 1. Coordinate communication between ALC delegation prior to traveling to DC</td>
</tr>
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<td>3. Organize Legislative Day on February 6, 2015 to engage potential members, inform policymakers, and host first official coalition event</td>
<td>• Develop a policy agenda • Create materials to share agenda and ‘make the case’</td>
<td>Policy committee</td>
<td>Confirm interest and recruit others 1. Nancy Brown 2. Nancy Brune 3. Paula 4. Shane 5. ?</td>
<td>For example... 1. Coordinate first call and set up future calls 2. Identify a process for getting input from other coalition members 3. Evaluate external policy environment and identify agenda items 4. Develop materials to share at Legislative Day</td>
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<td>• Plan logistics of the event • Create onepager on the NABC</td>
<td>Ad hoc planning committee</td>
<td>Confirm interest and recruit others: 1. Nancy Brown? 2. Edith 3. Jeannette 4. ?</td>
<td>For example... 1. ID &amp; plan for location, time, and set-up for event 2. Coordinate w/ outreach committees on size of event, planning for food and printing of materials 3. Create agenda for event 4. Use finalized TOC and value proposition to create onepager on what NABC is</td>
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Example Short-Term Structure

- Part-Time Staff
  - Interim Steering Committee
    - Ad Hoc Meeting Planning Committee
    - Outreach Committee
    - Policy Committee
    - Ad Hoc ALC Delegation
  - Coalition Members
Meeting Facilitation: Opening

- Start with a check-in and ground rules
- Clarify and get agreement on goals of the meeting
- Include an anchoring exercise, e.g.:
  - “Think of a previous policy win you are familiar with, and take 30 seconds to write down one-two reasons it was successful.”
  - “On a scale of 1-10, how excited are you to talk about creating our new resource directory today?”
Setting a Meeting Agenda

- Pair information sharing with an action item
  - Information sharing alone can go awry
  - What do you want people to do with the information? Or take from the discussion?
- Use time to talk about what needs to get done
  - Think about how you can leverage people’s skills

Tip for setting the agenda:
- Have the steering committee or planning team think about what needs to get done for the coalition and what input or action you need from those attending the meeting
Closing and capturing a meeting

- Review agreements, next steps and assignments
- Identify topics and/or goals for future meetings
- Do a meeting evaluation
- Send out action-oriented, timely notes
What do you say? How often?

- Timely follow-up
- Action-oriented items
- Relevant information
- Communicate early and often – don’t lose momentum
- Content and frequency can vary by audience
Communications Example—this should complement your needs and agenda

- **Frequent**: Biweekly, Monthly?
  - Meeting notes
  - Opportunities to get involved
  - Updates from partners on their work
  - Action items

- **Somewhat frequent**: Bimonthly?
  - Opportunities to get involved
  - Action items
  - Large external communications
  - Newsletter

- **Less frequent**: Quarterly?
  - Large external communications
  - Newsletter

Funders and policymakers

Allies: workforce board, community colleges, financial institutions

Coalition members

@ProsperityNow
prosperitynow.org
Who is going to make sure the work moves forward?

**Staff/Backbone**
- Do you have dedicated staff?
- What are their responsibilities?

**Working group**
- Is there a working group for this?
- Do they have assigned tasks?

**Member volunteers**
- Can you assign tasks to members?
- Do members have skills that would be beneficial here?
Coalitions and Backbone Organizations

A coalition coordinator or backbone organization can:

✓ Guide a coalition’s vision and strategy development
✓ Serve as project manager and lead implementor
✓ Track progress, data and metrics
✓ Coordinate coalition efforts (foster cross-partner communications, alignment and collaboration)
✓ Facilitate communications, meetings and updates
✓ Serve as fiscal sponsor

And/or whatever you deem necessary to help your coalition be effective!
Concerns and needs we often hear:

- “Identifying a good fundraising idea”
- “Organizing a fundraising strategy”
- “Lack of funders in rural states”
- “Making sure they understand the value of the work we do”
Developing a Fundraising Strategy

1. Need for change
   • Present data, share challenges facing your population and evidence of coalitions’ will to drive change

2. Case for coalition support: why a coalition is right vehicle for change
   • Power in numbers; diversity of stakeholders
   • Reach to diverse constituencies
   • Amplified voice, magnified muscle to effect change
   • (Include coalition’s Theory of Change)

3. Understand funder’s perspective
   • Stay up-to-date on funders’ priority areas for investment (and program officers’ interests)
   • Know questions funders are asking themselves

4. Components of a request for support
   • Need and case (see #1)
   • Vision
   • Goal
   • Activities to Get There, including capacity building for coalition
   • Timeframe of activities
   • List of desired outputs and outcomes
   • Impact measures
   • Budget, including in-kind supports from coalition members
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Audience Perspectives and Q&A
Resources, Next Steps
Resources

- As Vehicles of Change, Coalitions Have Great Impact, Prosperity Now
- Lessons and Insights, Prosperity Now
- What Makes an Effective Coalition, California Endowment
- Prosperity Now’s Advocacy Toolkit
Take Action with Prosperity Now Campaigns!

Sign up to stay informed about the latest developments and opportunities to take action by joining one of our four federal policy campaigns.

Visit any of the Campaigns above at https://prosperitynow.org/take-action to learn more and join.

HOMEOWNERSHIP
Homeownership is key to building wealth. Together, we will advocate for policies that reduce barriers to homeownership, and fight against discriminatory lending practices.

CONSUMER PROTECTIONS
Consumer protections create fairer, more transparent financial markets. Together, we will protect the mission and integrity of the Consumer Financial Protection Bureau to ensure consumers keep the safeguards they deserve.

FINANCIAL SECURITY
Financial security requires a strong safety net and opportunities to build savings. Together, we’ll help vulnerable families achieve economic stability and mobility.

TURN IT RIGHT-SIDE UP
The new tax law doubles down on wealthy inequality. Together, we will advocate for proven wealth-building tax incentives for low- and moderate-income households, especially those of color.

Visit any of the Campaigns above at https://prosperitynow.org/take-action to learn more and join.
Prosperity Now Advocacy Center

Take action today at https://prosperitynow.org/take-action

Here you can:

- Email a MOC
- Call a MOC
- Tweet at a MOC
- Schedule a Meeting
- Sign a petition
Thank you!

Fran Rosebush Baylor
VP, Partnerships, Field Engagement & Policy at Prosperity Now

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