



FINANCIAL EMPOWERMENT NETWORK
changecounts!™

2021 Coalition-Building Learning Series



This webinar is being recorded.

Your hosts for today's session is Caleb Stephens and Cathy Cooper, WaFd Bank



WaFd Bank

WELCOME!

This webinar is being recorded.

Today's Topic: Tools and Strategies for Effective Coalitions and Collaboratives

Welcome



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What Makes an Effective Coalition?

Shared purpose and vision

What's the need we're addressing? What's the difference we're seeking to make?

Common goal destination

What are the common outcomes we're working to achieve together?

Clear value proposition

Why is a coalition needed to achieve the outcomes and goals?

Strategically engaged membership

Do we have the right people at the table? Who is not at the table who should be?

Formalized set of rules/procedures

Common understanding of how we interact and work together

A "core" leadership team or backbone

Who has responsibility to move the work forward?

Transparent decision-making processes

Who has authority to make decisions and how?

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.

Various Coalition/Network Terms

Coalition	Commitment to cooperate for common cause consistent with self-interest
Collaborative	More intentional than coalition, collective determination to reach shared objective, often creative in nature
Membership association	Leadership directly reflects member priorities, emphasizes benefits in exchange for dues
Campaign	Time-limited endeavor, focused on a specific goal
“Movement-Oriented” Network	More open structures, shared ownership and leadership dynamic, tied to larger social movements
“Referral” Network	Streamlines recruitment and service delivery across multiple agencies
Partnership	Formal agreement to deliver on specific projects or initiatives

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/>.

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

**ULTIMATE
GOAL**

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

Dramatically expanded opportunities to save and build assets

**LONG-TERM
OUTCOMES**

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

**Policies adopted that encourage
asset-building; policy disincentives
removed**

**INTERMEDIATE
OUTCOMES**

**Network Members
have greater capacity
to deliver services**

**Financial capability and asset-
building approaches
embedded into other systems**

**Network Members
have greater political
power**

**NEARER-TERM
OUTCOMES**

**Network Members learn
from each other**

**Network Members
strengthen partnerships
to deliver services**

**Network Members build
alliances with others**

**Network Members use
knowledge to improve
programs**

**Network Members
advocate as
constituents**

**Network Members act
strategically to take
advantage of opportunities**

STRATEGIES

**Build Network Member
knowledge and capability**

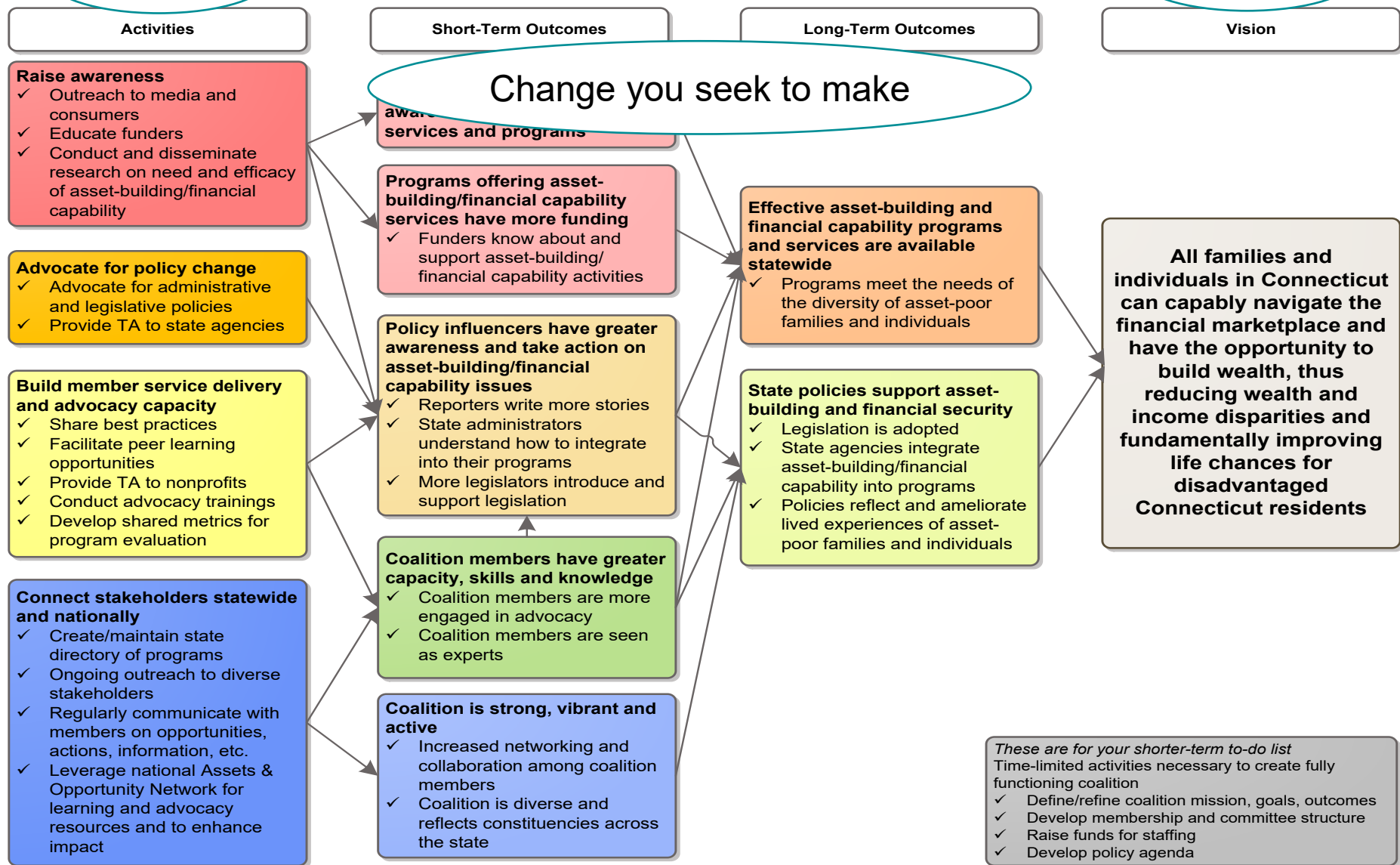
**Build connections and
resources available to Network
Members**

**Engage Members in
Policy Advocacy**

HOW

Set Building Collaborative Theory of Change: Activities, Outcomes, and Vision

WHY



Why Do We Engage in Coalitions?

Benefits	Costs
Networking	Time
Information sharing	Loss of autonomy
Access to resources	Compromise
Resource pooling	Expending scarce resources
Involvement	Unfavorable image of association
Shared mission	Lack of direction
Ability to attain desired outcomes	Reduced visibility/recognition
Enhanced visibility/power in numbers	Negative exposure
Enjoyment of working with others	Middle-ground tendency
Personal recognition	Obscured voices
Ability to build skills	

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.



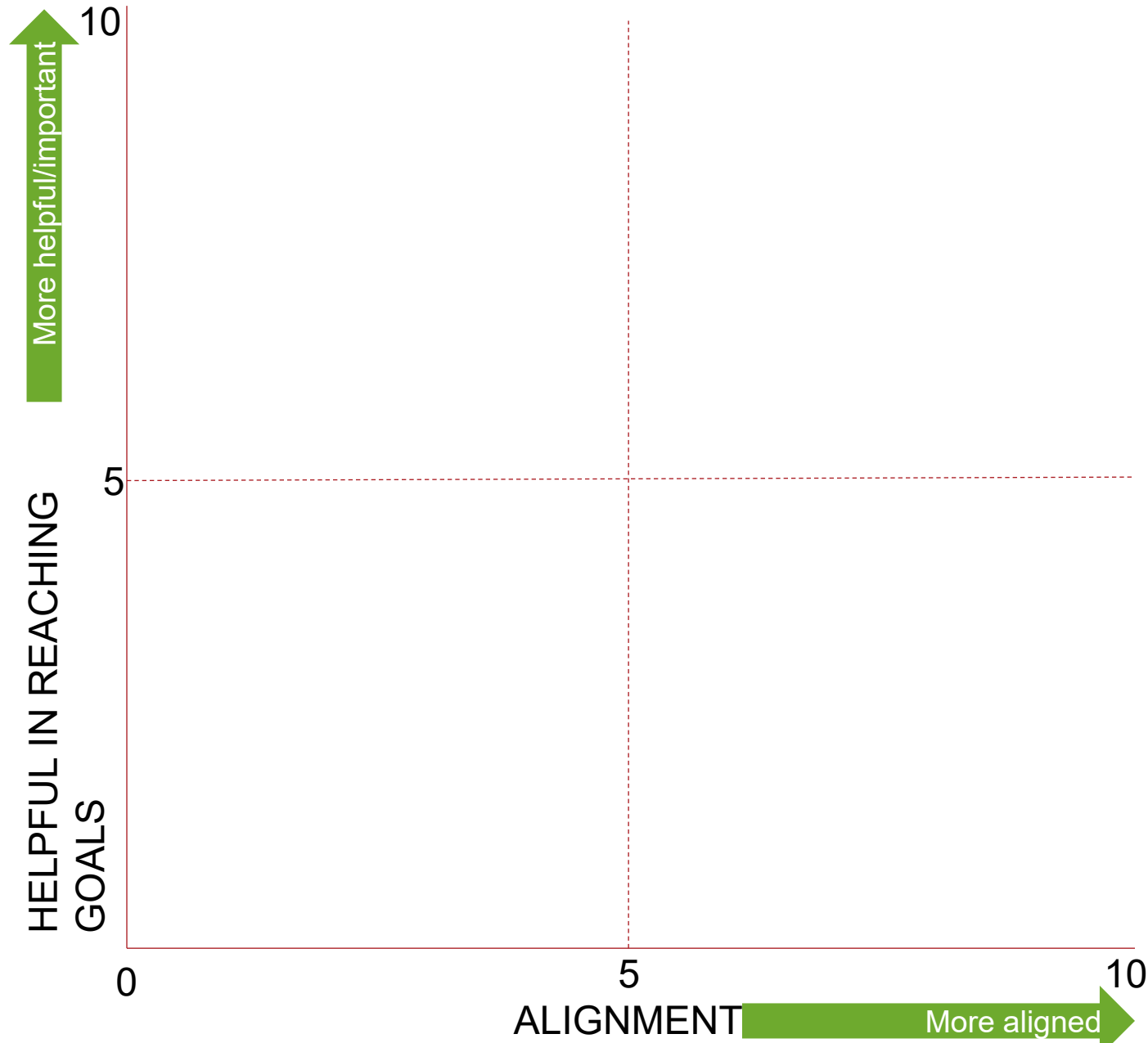
- ✓ Are made up of members and partners reflective of the community served
- ✓ Explicitly name social justice as a key element of their work
 - Is reflected throughout their goals and priorities
- ✓ Foster a participatory process where all stakeholders have equal say in achieving goals

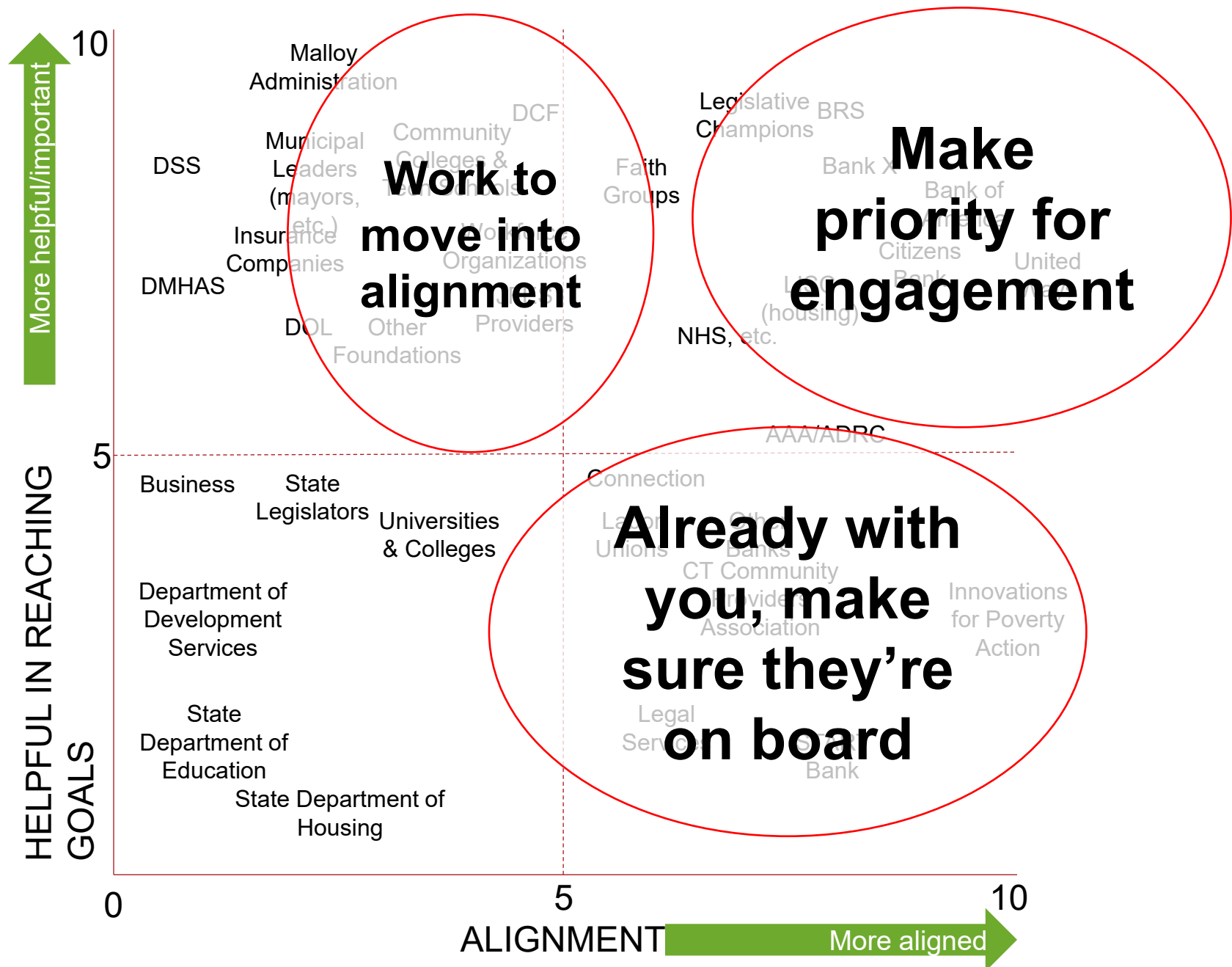
TOOLS:

- ✓ Checklist on Coalition Assessment for Diverse Leadership and Inclusion, available at <https://www.communitycatalyst.org/resources/2017-alerts/8-4/Diversity-of-Coalition-Membership-and-Leadership-Tool-FINAL.pdf>.
- ✓ Racial Equity Policy Design and Advocacy, available at https://prosperitynow.org/sites/default/files/PDFs/2017-10_racial-equity-policy-design-advocacy-primer.pdf.

Getting the Right People at the Table

Who do you have with you? Who do you need?

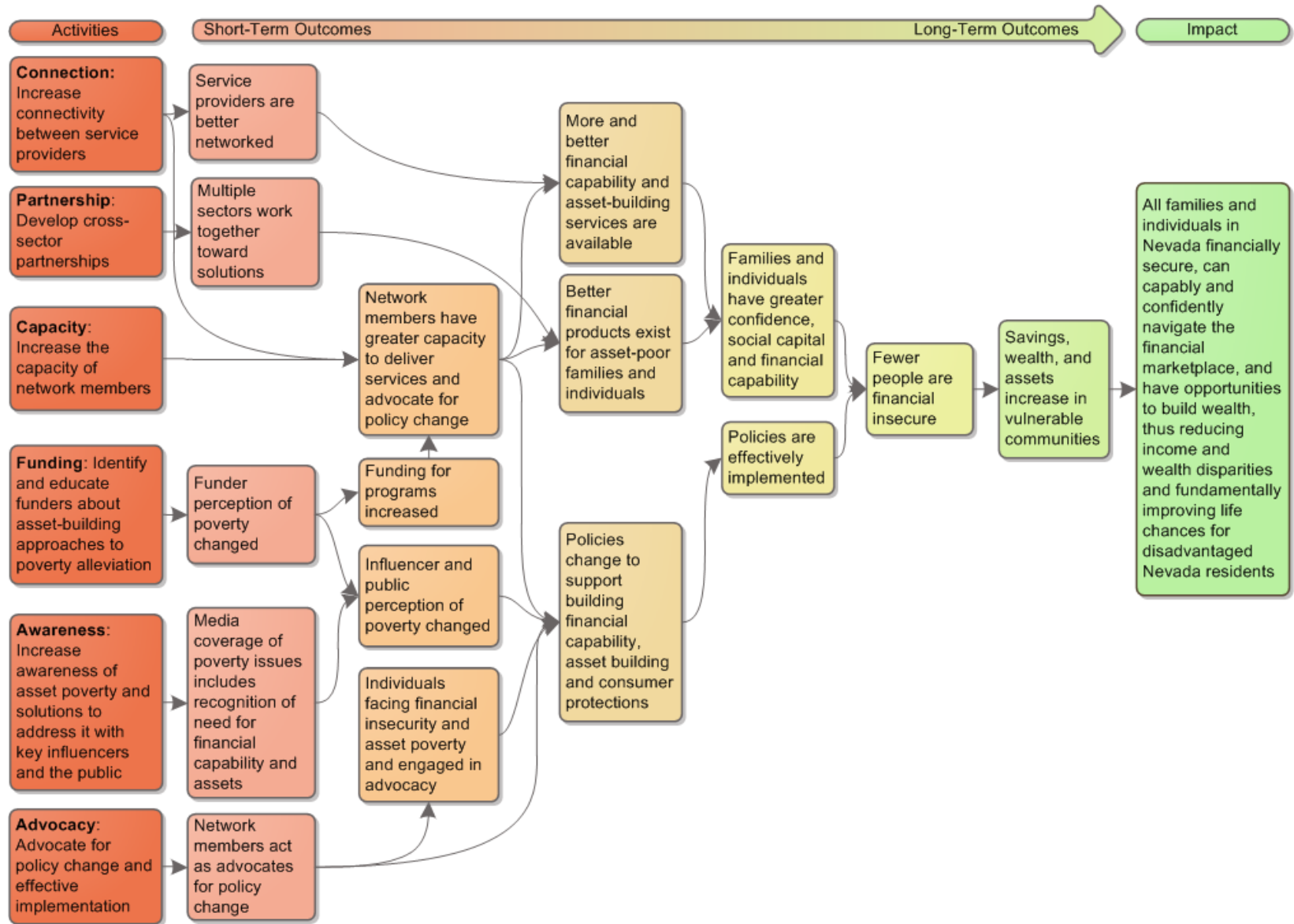




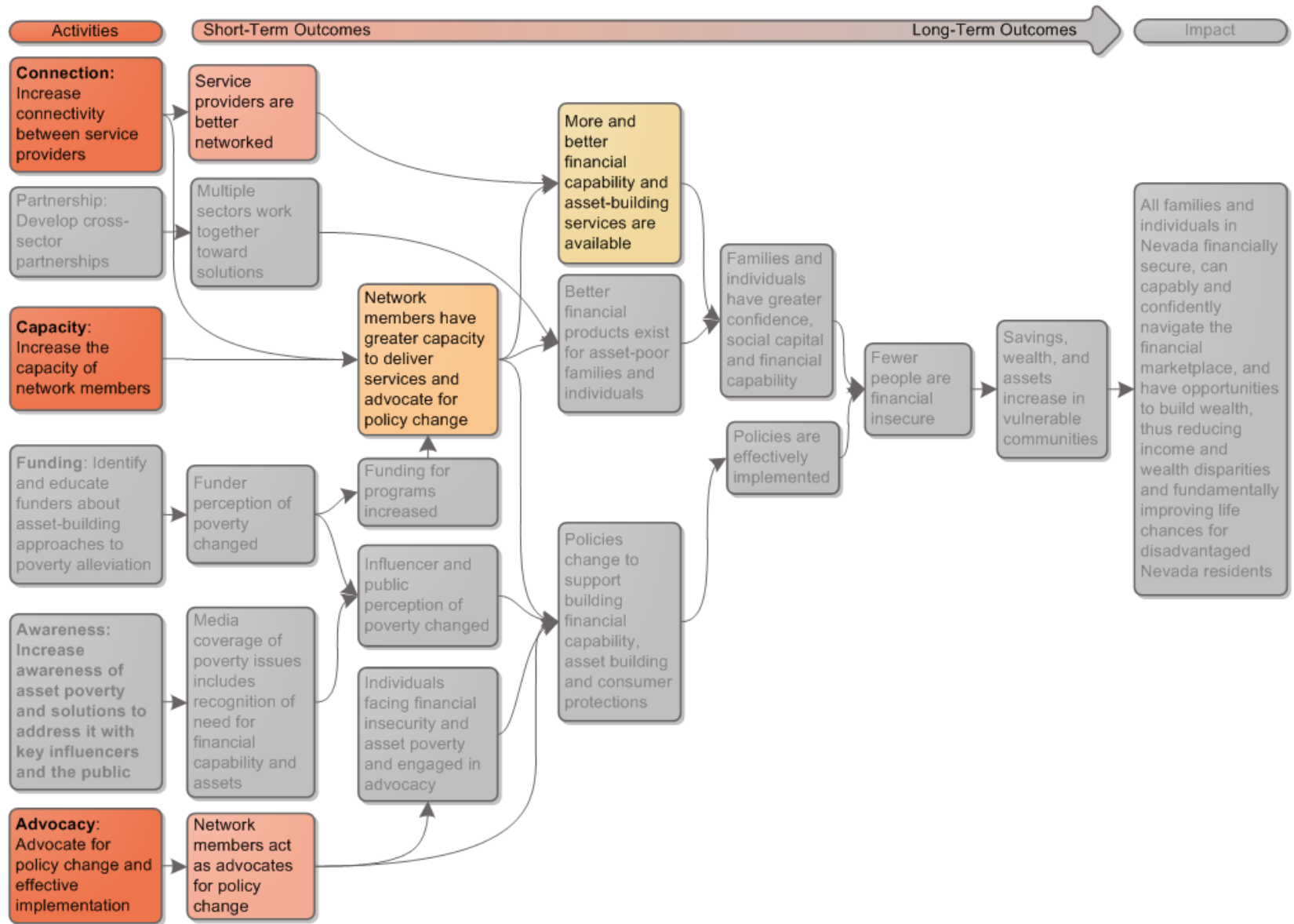
Moving Coalition Ideas into Action

- 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



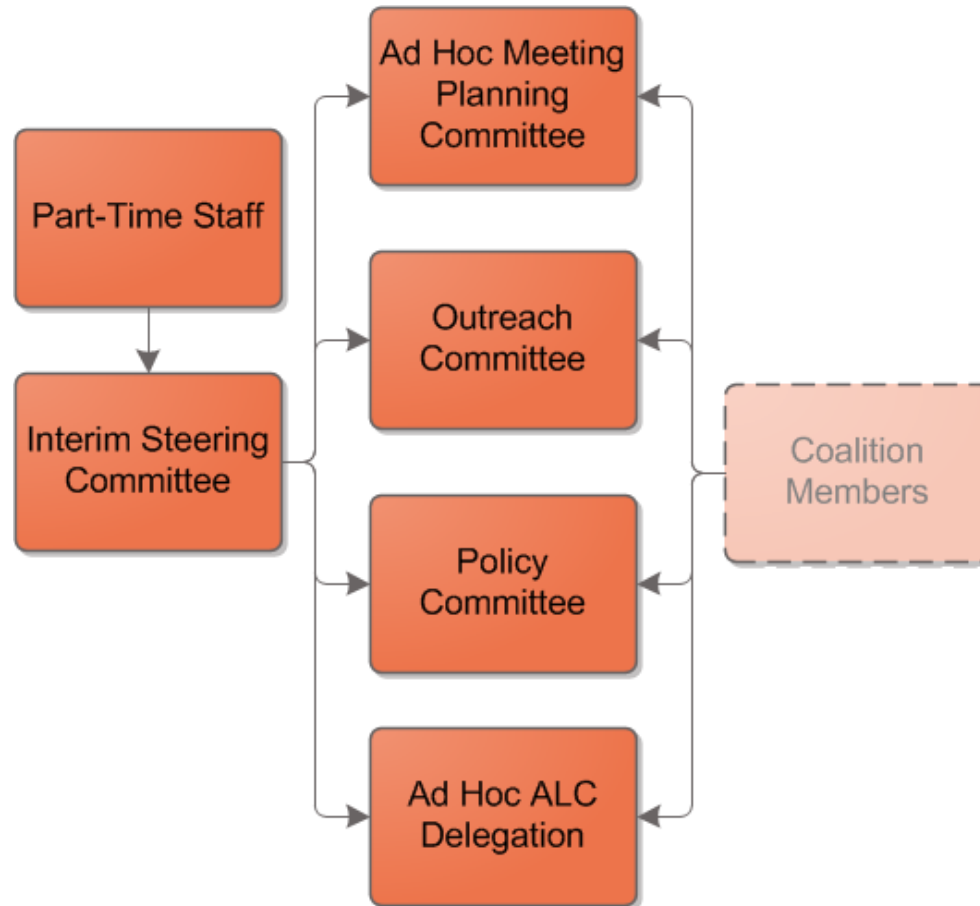
Asset Building Coalition: Priority Activities, Short-Term Outcomes



Asset Building Coalition: Short-Term Next steps

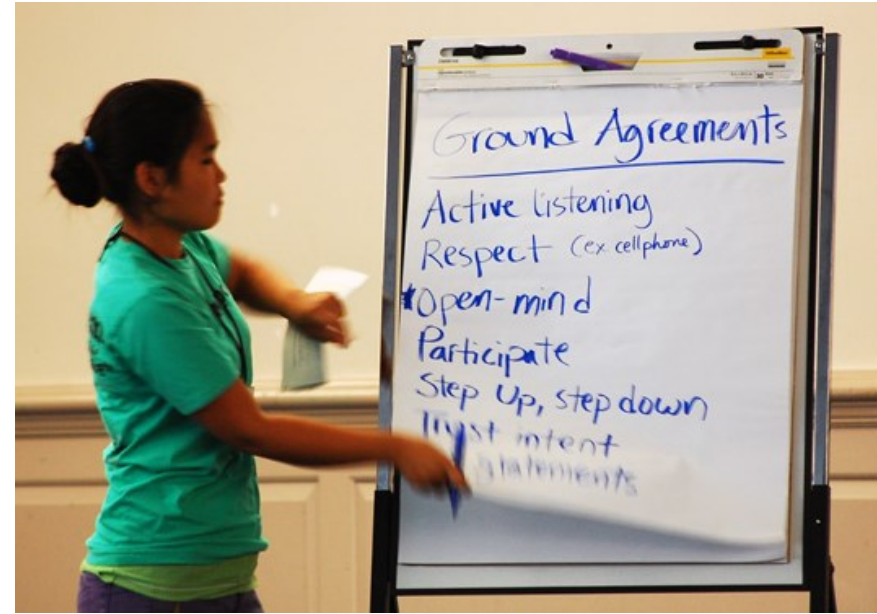
Concrete activities for next 6 months	What needs to happen	Structure for getting it done	Who will help	Immediate next steps
1. Host regional meetings between Aug 2014 and Jan 2015 to build relationships with potential members and build momentum for Legislative Day	Schedule and plan logistics of regional meetings in the north and south	Ad hoc planning committee	Confirm interest and recruit others: 1. Edith 2. Jeannette 3. ? 4. ?	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
	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	Interim Steering Committee	Confirm interest and recruit others: 1. Nancy Brown 2. Michele 3. Nancy Brune 4. Edith 5. ? 6. ?	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
	Outreach/invite attendees to regional meetings	Outreach committee: pulled from Planning committee & Interim Steering Committee	Confirm interest and recruit others North outreach: Edith Jeannette South outreach: Michele ?	For example ... 1. Use list of brainstormed potential partners to identify groups to invite
2. Leverage ALC in Sept 2014 to build relationships w/ peers in NV & A&O Network Lead Orgs nationally	• Participate in the A&O Network Leadership Intensive • Participate in Hill Visits • Debrief after ALC to identify takeaways to share w/ whole coalition	Ad hoc ALC delegation	14 attendees already registered from Nevada	For example ... 1. Coordinate communication between ALC delegation prior to traveling to DC
3. Organize Legislative Day on February 6, 2015 to engage potential members, inform policymakers, and host first official coalition event	• Develop a policy agenda • Create materials to share agenda and 'make the case'	Policy committee	Confirm interest and recruit others: 1. Nancy Brown 2. Nancy Brune 3. Paula 4. Shane 5. ?	For example ... 1. Coordinate first call and set-up future calls 2. Identify a process for getting input from other coalition members 2. Evaluate external policy environment and identify agenda items 3. Develop materials to share at Legislative Day
	Conduct outreach to invite attendees	Outreach committee: pulled from Planning committee & Interim Steering Committee	Confirm interest and recruit others North outreach: Edith Jeannette South outreach: Michele ?	For example ... 1. Use brainstormed list of stakeholders to identify groups to invite
	• Plan logistics of the event • Create one-pager on the NABC	Ad hoc planning committee	Confirm interest and recruit others: 1. Nancy Brown? 2. Edith 3. Jeannette 4. ?	For example ... 1. ID & plan for location, time, and set-up for event 2. Coordinate w/ outreach committee 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 one-pager on what NABC is

Example Short-Term Structure



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

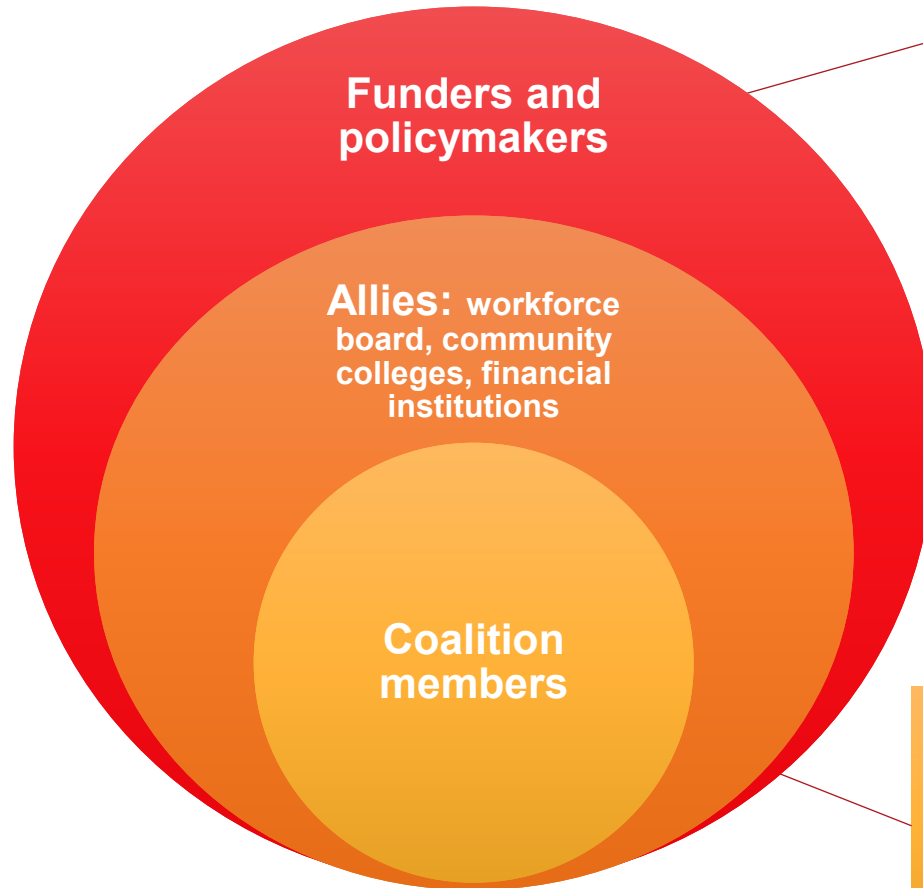
- Review agreements, next steps and assignments
- Identify topics and/or goals for future meetings
- Do a meeting evaluation
- Send out action-oriented, timely notes



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



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

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

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

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

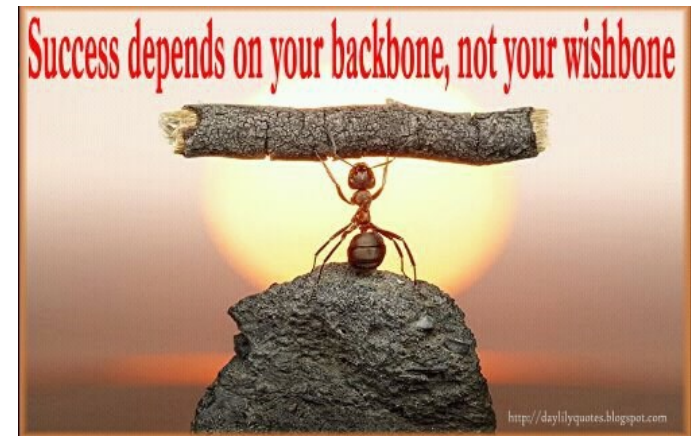
- Can you assign tasks to members?
- Do members have skills that would be beneficial here?

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!



Coalition Fundraising & Sustainability

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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Transparent decision-making processes

Who has authority to make decisions and how?

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.

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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.

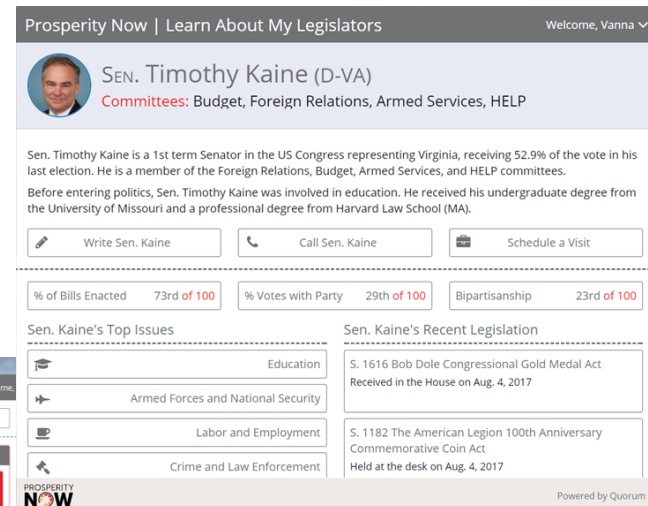
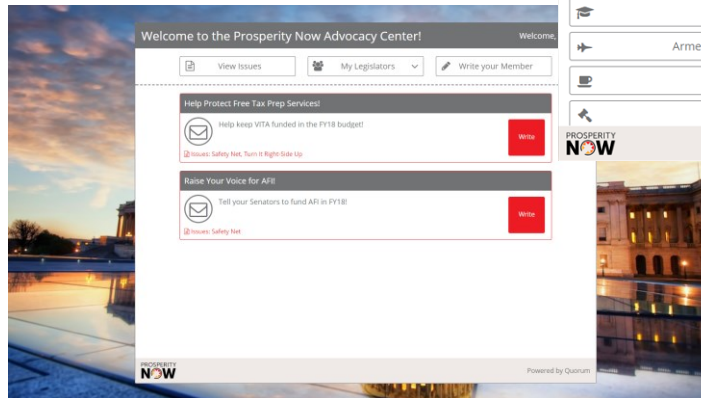
Visit any of the Campaigns above at <https://prosperitynow.org/take-action> to learn more and join.

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!



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