

COALITION BUILDING TOOLKIT

Compiled by: The National WIC Association



**National WIC
Association**

COALITION BUILDING TOOLKIT: Table of Contents

Introduction	3
<hr/>	
Part One: Community Partnerships for Healthy Mothers and Children Materials	
Coalition Building Checklist	4
<hr/>	
Memorandum of Understanding (MOU)	5
<hr/>	
Recruiting Coalition Members: Phone and Email Templates	7
<hr/>	
Part Two: Coalition Building Materials from Kansas University's Community Toolbox	9
<hr/>	
Part Three: Additional Resources	28
<hr/>	
Part Four: Case Studies from Cross Sector Work on Obesity Prevention, Weight Maintenance, and Treatment	28

Introduction

As part of the Community Partnerships for Healthy Mothers and Children project, each sub-recipient agency is required to serve as the convening member of a **newly developed** or **strengthened multi-sectoral coalition** that will conduct a community needs assessment and implement a community action plan.

NWA has compiled the following toolkit to provide you with guidance in forming your coalition.

While Part One of this toolkit was created by NWA (with some help from other National Organizations involved in this CDC Project), Parts Two through Four are collections of materials created by other organizations.

Part One: Community Partnerships for Healthy Mothers and Children Materials

COALITION BUILDING CHECKLIST:

___ Form a 3-person Leadership Team.

___ Identify necessary coalition members.

___ Recruit coalition members, using appropriate means:

- Personal contact
- Phone
- E-mail

___ Recruit at least 10 coalition members, representing at least 7 sectors. Sectors include but are not limited to: *1) community members; 2) local health departments; 3) local elected officials; 4) retailers and regional food distributors; 5) faith organizations and/or the clergy; 6) local non-profit organizations and agencies; 7) medical organizations/community clinics; 8) Cooperative Extension employees (SNAP-Ed, EFNEP, 4-H, Master Gardeners, etc.); 9) food banks; 10) local farmers; 11) public and private school professionals; 12) the media; 13) industry leaders.*

___ Plan and hold an inclusive and exciting first meeting, where people leave with assignments and the next meeting scheduled.

___ Follow up on the first meeting, checking on assignments, reminding people about the next meeting, and continuing to recruit new members.

___ Complete and submit MOU.

___ Complete and submit first coalition reporting form.

MEMORANDUM OF UNDERSTANDING

THIS Memorandum of Understanding ("MOU") is made this _____ day of _____, 20____, by and between the members of _____ coalition to support the work of the National WIC Association's Community Partnerships for Healthy Mothers and Children project made possible through the Centers for Disease Control and Prevention (CDC) as part of the National Implementation and Dissemination for Chronic Disease Prevention program within the Division of Community Health, Funding Opportunity Announcement #DP14-1418.

I. PURPOSE

This agreement is made in order to define the relationship between coalition partners and to outline the respective roles and responsibilities of each entity related to the Community Partnerships for Healthy Mothers and Children cooperative agreement with the National WIC Association.

Coalition members share the primary goal to improve the public's health and promote equity in health status for all. Parties enter into this agreement understanding that its provisions will contribute to the capacity of all organizations by strengthening the foundation for mutual support, accountability and partnership. Coalition members do this through the collaborative use of expertise, influence, and resources to grow stronger as organizations and to promote shared priorities in the areas of planning and public health.

II. RESPONSIBILITIES

Please list general membership responsibilities.

For example:

- *ABC organization will provide evaluation support to the coalition;*
- *EFG organization will provide insights and perspective for __X__ sector/group*
- *XYZ organization will provide meeting management support to the coalition.*

IN WITNESS WHEREOF, the parties hereto have caused this MOU to be executed by their duly authorized officers, effective as of the day and year first written above.

Signature

Date

Organization (if applicable)

Signature

Date

Organization (if applicable)

Signature

Date

Organization (if applicable)

Signature

Date

Organization (if applicable)

Signature

Date

Organization (if applicable)

Signature

Date

Organization (if applicable)

Coalition Recruitment – Mail or Email

<Insert date here>

To <Organization X or community member>

I am writing on behalf of the Community Partnerships for Healthy Mothers and Children project, a 15 month cooperative agreement funded by CDC that supports the National WIC Association and its local agency members in building and strengthening community infrastructure to implement population-based strategies to improve communities' health. As an awardee, this project will allow <my organization> to work with community stakeholders to build capacity for implementing population-based strategies that address poor nutrition and lack of access to chronic disease prevention, risk reduction and management opportunities—two predictors of chronic disease (i.e., heart disease, stroke, diabetes, and obesity)—in our community.

<Organization X or community member> is likely aware of the poor health outcomes associated with poor nutrition and lack of access to chronic disease prevention, risk reduction and management opportunities. In fact, the health outcomes in <our community> are quite illuminating. We suffer from <please list any poverty and chronic disease statistics for the community you serve that are available to you>. In order to improve chronic disease outcomes related to <list specific chronic disease concerns in your community such as heart disease, stroke, diabetes, obesity> at the local level, <my organization> is <developing a coalition (for new coalitions) or enhancing Coalition X (for existing coalitions)>. The coalition will engage in discussion about community needs assessment information, create a community action plan, and implement policy, systems, and environmental change strategies that have both broad reach and moderate to large effects on chronic disease risk factors. Would <Organization X or community member> be interested in working with us on this important project as a coalition member?

The slides from the introductory webinar, which provides an overview of the project, are <attached (if sent via email) or enclosed (if sent via mail)> for your reference. Please contact me if you have further questions about the project or if you are interested in setting up a meeting to discuss the issue further.

Thank you very much for your attention to this matter. I look forward to following up with you in the next week.

Sincerely,

<Insert your name here>

<My organization>

<My city, state>

<insert your email address here>

<insert your phone number here>

Coalition Recruitment – Telephone Script

Hello,

My name is <insert your name>. I am the <position title> at <my organization>. We were recently funded through the National WIC Association and CDC's Community Partnerships for Healthy Mothers and Children project. As an awardee, this project will allow <my organization> to work with other community stakeholders to implement population-based strategies that will improve access to healthy food and beverages and increase opportunities for chronic disease prevention, risk reduction or management through community and clinical linkages in our community. <My organization> is <developing a coalition (for new coalitions) or enhancing Coalition X (for existing coalitions)>. The coalition will engage in discussion about community needs assessment information, create a community action plan, and implement policy, systems, and environmental change strategies that have both broad reach and moderate to large effects on chronic disease risk factors. Would <Organization X> be interested in working with us on this important project as a coalition member?

Additional Talking Points:

- Specific chronic disease concerns in your community such as heart disease, stroke, diabetes, and obesity
- Benefits of being a coalition member and working on the Community Partnerships for Healthy Mothers and Children project
 - Take on a leadership role in the community
 - Directly engage in a multisectoral project and collaborate with community stakeholders as an expert from <sector X>
 - Develop and refine strategies that will benefit the local community
 - Improve the health of mothers and children and the greater community
 - Support the work of WIC
- Potential strategies that you'd like to implement in your local community. Please refer to the introductory webinar slides for ideas.
- Existing coalition members or organizations/sectors you'd like to be represented on the coalition
- Ideas for sustaining the work of the project

Part Two: Coalition Building Materials from KANSAS UNIVERSITY'S COMMUNITY TOOL BOX—<http://ctb.dept.ku.edu/en>

Often, community problems or issues are too large and complex for any one agency or organization. In those circumstances, putting together a coalition of groups and individuals can be an effective strategy for bringing the community's resources to bear, and getting everyone moving in the same direction. In this section, we'll discuss just what a community coalition is, why and when it can be a good strategy, who should belong to it, and how to get it started.

WHAT IS A COALITION?

In simplest terms, a **coalition** is a **group of individuals and/or organizations with a common interest who agree to work together toward a common goal**. That goal could be as narrow as obtaining funding for a specific intervention, or as broad as trying to improve permanently the overall quality of life for most people in the community. By the same token, the individuals and organizations involved might be drawn from a narrow area of interest, or might include representatives of nearly every segment of the community, depending upon the breadth of the issue.

Coalitions may be loose associations in which members work for a short time to achieve a specific goal, and then disband. They may also become organizations in themselves, with governing bodies, particular community responsibilities, funding, and permanence. They may draw from a community, a region, a state, or even the nation as a whole (the National Coalition to Ban Handguns, for instance). Regardless of their size and structure, **they exist to create and/or support efforts to reach a particular set of goals**.

Coalition goals are as varied as coalitions themselves, but often contain elements of one or more of the following:

- *Influencing or developing public policy, usually around a specific issue.*
- *Changing people's behavior* (reducing smoking or drug use, for instance).
- *Building a healthy community*. This term generally refers both to the community's physical health (which may include not only medical and preventive or wellness services,

but the environment, community planning, housing, hunger, substance abuse, and other factors) and its social and psychological health.

It should be noted here that the goals and purposes of a coalition can change from time to time, in response to external conditions and the needs of their members and communities.

WHY START A COALITION?

There are a number of reasons why developing a coalition might be a good idea. In general terms, it can **concentrate the community's focus on a particular problem, create alliances among those who might not normally work together**, and **keep the community's approach to issues consistent**.

Consistency can be particularly important in addressing a community issue, especially if there are already a number of organizations or individuals working on it. If their approaches all differ significantly, and they're not cooperating or collaborating, it can lead to a chaotic situation where very little is accomplished. If, on the other hand, they can work together and agree on a common way to deal with the issue and on common goals, they're much more likely to make headway.

Some more specific reasons for forming a coalition might include:

- *To address an urgent situation.* The youth violence example that introduces this section is a good illustration of this reason.
- *To empower elements of the community - or the community as a whole - to take control of its future.* This may mean addressing the place of youth in the community, for instance, or looking at economic development in light of globalization and community resources.
- *To actually obtain or provide services.* It may take a coalition - either initially or over the long term - to design, obtain funding for, and/or run a needed intervention in the community.
- *To bring about more effective and efficient delivery of programs and eliminate any unnecessary duplication of effort.* Gathering all the players involved in a particular issue can result in a more cohesive and comprehensive intervention. Rather than duplicating their efforts, organizations can split up or coordinate responsibilities in ways that afford more participants access to programs and allow for a greater variety of services.
- *To pool resources.* A number of organizations and individuals together may have the resources to accomplish a task that none of them could have done singly. In general,

people and organizations join coalitions to do just that - accomplish together what they cannot alone.

- *To increase communication among groups and break down stereotypes.* Bringing together groups and individuals from many sectors of the community can create alliances where there was little contact before. Working together toward common goals can help people break down barriers and preconceptions, and learn to trust one another.
- *To revitalize the sagging energies of members of groups who are trying to do too much alone.* A coalition can help to bolster efforts around an issue. For people who've worked too long in a vacuum, the addition of other hands to the task can be a tremendous source of new energy and hope.
- *To plan and launch community-wide initiatives on a variety of issues.* In addition to addressing immediately pressing issues or promoting or providing services, coalitions can serve to unify efforts around long-term campaigns in such areas as smoking cessation, community economic development, or environmental preservation.
- *To develop and use political clout to gain services or other benefits for the community.* A unified community coalition can advocate for the area more effectively than a number of disparate groups and individuals working alone. In addition, a wide -ranging coalition can bring to bear political pressure from all sectors of the community, and wield a large amount of political power.
- *To create long-term, permanent social change.* Real change usually takes place over a period of time through people gaining trust, sharing ideas, and getting beyond their preconceptions to the real issues underlying community needs. A coalition, with its structure of cooperation among diverse groups and individuals and its problem-solving focus, can ease and sometimes accelerate the process of change in a community.

BARRIERS TO STARTING A COALITION

There are often barriers to starting a coalition, and it's important to be aware of and anticipate them, because they may dictate the process the coalition will have to follow in order to begin successfully. Among the most likely:

- **Turf issues.** Organizations are often very sensitive about sharing their work, their target populations, and especially their funding. Part of the work of starting a coalition may be to convince a number of organizations that working together will in fact both benefit all of them and better address their common issues.

- **Bad history.** Organizations, individuals, or the community as a whole may have had experiences in the past that have convinced them that working with certain others - or working together at all - is simply not possible. A new coalition may have to contend with this history before it can actually start the work it needs to do.
- **Domination by "professionals" or some other elite. All too often, agency people with advanced degrees, local politicians, business leaders, and others, in their rush to solve problems or to "help the disadvantaged," neglect to involve the people most affected by the issue at hand and other community members. Creating a participatory atmosphere and reining in those who believe they have all the answers is almost always part of starting a coalition.**
 - Part of a solution here may often be providing support for those who aren't used to the "professional" way of holding meetings and reaching conclusions, while at the same time training professionals and others to include those whose opinions are likely to be far more accurate and important to the solving of the problem than their own. This might mean bringing in an outside facilitator, or simply paying careful attention to guiding the process from within the group.
- **Poor links to the community.** A first step may have to be the development of hitherto nonexistent relationships among agencies and the community at large.
- **Failure to provide and create leadership within the coalition. Coalitions demand a very special kind of collaborative leadership.** If that leadership isn't available and can't be developed from within the coalition, its existence is probably at risk. It may be necessary to bring in an outside facilitator and/or training in collaborative leadership to salvage the situation.
- **The perceived - or actual - costs of working together outweigh the benefits for many coalition members. The task here may be to find ways to increase benefits and decrease costs for the individuals and organizations** for whom this is the case.

If you understand the potential barriers to forming a coalition in your community, you can plan for them, and increase your chances of success.

WHO SHOULD BE PART OF A COALITION?

In general, the broader the membership of any coalition, the better, but there are certain people and groups whose representation on a coalition is absolutely essential.

STAKEHOLDERS.

These are the people who have a stake in the success of the coalition's efforts. They can include:

- *Those most affected by the issue.* These may comprise current or potential participants in programs, people who lack such basic amenities as health insurance or decent housing, sufferers from particular diseases, or - in the case, for instance, of many environmental and public health issues - the community as a whole. It makes no sense, and is patently unfair, to make decisions that affect people's lives without including them in the process.
 - Examples include:
 - Community members (of diverse abilities, ages, cultures, gender, income levels, race/ethnicity, and sexual orientation)
- *Formal and informal helpers, those charged with carrying out community functions related to the issue, and others affected by what the coalition might do.*
 - Examples include:
 - Local agencies and organizations and their staffs:
 - Area agencies on aging
 - Faith-based organizations
 - Community development, revitalization, and redevelopment agencies and organizations
 - Housing agencies
 - Organizations serving populations experiencing health inequities
 - Public health agencies
 - Social service agencies
 - Zoning and Planning organizations
 - Philanthropy organizations
 - Cooperative Extension employees (SNAP-Ed, EFNEP, 4-H, Master Gardeners, etc.)
 - Individuals and institutions involved in food production and dissemination
 - Food banks
 - Local farmers
 - Regional food distributors
 - Retailers and vendors
 - Institutions and individuals involved in planning and development
 - Developers
 - Local public works department
 - Health care systems, hospitals, community clinics, and health care providers

- Public and private school professionals (teachers, principals, school nurses, PE teachers, early child care providers, etc.)
- The media
 - *Rather than trying to get media members to join, you might want to contact them to publicize and cover your coalition and its efforts*

COMMUNITY OPINION LEADERS.

It's extremely useful to save seats at the table for those who can influence large numbers of others.

- Examples include:
 - Clergy
 - Civic leaders
 - Industry leaders

Involving *emerging* leaders is equally important. These are people, often without a particular position, whom others look to for guidance. They may be leaders of volunteer efforts, youth highly respected by their peers, active parents, or just those with clear leadership potential. They are important to have on board, both for their ideas and energy, and for the influence they wield and will wield as they become more widely known and respected in the community.

POLICY MAKERS.

The participation of local political leaders, state representatives, and others in policy-making positions will both add credibility to your enterprise and increase the chances that you can actually influence policy in your area of interest.

- Examples include:
 - Local legislators and/or officials
 - State legislators and/or officials

HOW DO YOU START A COMMUNITY COALITION? PUT TOGETHER A CORE GROUP (I.E. LEADERSHIP TEAM).

Your first step is to find and make contact with those few individuals and organizations most involved with the issue. This will be your **Leadership Team**.

Some reasons why a core group, rather than an individual, should lead the effort:

- **A core group will have more contacts and more knowledge of the community than a single individual.**
- It will give the idea of a coalition more standing among potential members.
- **It will make finding and reaching potential members a much faster process.**
- A core group will make the task easier on all the individuals involved, and therefore more likely to get done.
- **It shows that the effort has wide support.**

What all successful coalitions have in common is strong leadership and a clear sense of where they are going at any given time. The need for strong leadership - whether individual or collaborative - cannot be overstressed. The ideal, in many ways, is to have the leadership dispersed throughout the coalition so that the departure of an individual doesn't create a vacuum. **But however it's distributed, leadership is the one thing a coalition can't do without.**

IDENTIFY THE MOST IMPORTANT POTENTIAL COALITION MEMBERS.

Especially if your coalition has a narrow and time-limited purpose, there are probably people or organizations you can't do without. It's important to identify them, and to target them specifically for membership.

Most of these individuals and organizations are referred to in "Who should be part of a coalition?" above, but each community is different. In yours, there may be a specific person among the target population, or a particular town official, without whom nothing can get done.

As mentioned earlier, none of this is to say that you shouldn't recruit many other people and organizations to your coalition as well. It simply means that you need to make a special effort to enlist these crucial members.

RECRUIT MEMBERS TO THE COALITION.

Now that your core group is in place, and you've decided on the potential members who are necessary to the success of the coalition, you can start recruiting members. Although it's important to start with the individuals and groups mentioned above, you'll probably want to be as inclusive as possible. It's unusual to hear about a coalition suffering because it has too many members.

Use the networking capacity of your core group to the fullest. The core group can brainstorm a list of possible members, in addition to those deemed essential. Then each member can identify individuals on the list whom she knows personally, or organizations where she has a personal

contact. If there are names left on the list without a contact, they can be divided among the members of the core group.

There are, obviously, a number of ways to contact people and organizations, including:

- **Face-to-face meetings**
- **Phone calls**
- **E-mail**
- Personal letters
- Mass mailings
- Public Service Announcements or ads in the media
- Flyers and posters

These are listed here in their approximate order of effectiveness, with direct personal contact being the best. It also takes longest, however, and probably should be reserved for those "must-haves" we discussed earlier. Most people are likely to be recruited by phone.

Be sure to ask those you talk to for suggestions about other potential members, and try to have them make the contact. That will spread out the work, and also give the invitation more credibility, since it comes from someone the contacted person knows. **If you are successful, you could end up contacting and recruiting several times the number of people and organizations on your original list.**

When you contact people to recruit them to the coalition, make sure you have something substantive to offer or to ask them to do. An invitation to a first meeting - at a specific time and place far enough in the future that schedules can be arranged to fit it in - is probably the most common offer.

We suggest that you aim to have at least 10 members in your coalition.

PLAN AND HOLD A FIRST MEETING.

The first meeting of a coalition is important. If it's a high-energy, optimistic gathering that gets people excited, you're off to a good start.

There are really two concerns here: the logistics of the meeting (where, when, how long, etc.) and the content of it.

There are a number of possibilities for the content of the first meeting. The agenda should depend on your particular issue and purposes, and on the needs of your community, but you'll probably want to include some of the following:

- ***Introductions all around.*** Everyone present should give a brief statement of who they are, the organization, if any, they're connected with, and the nature of their interest in the issue.
- ***Start defining the issue or problem around which the coalition has come together.*** This might mean the group coming up with an actual statement, or it might entail an initial discussion, followed by a small group being asked to draft a possible definition for the next meeting.
- ***Discuss the structure of the coalition.*** What kind of group will it be, how will it be run, what kinds of things will it actually do?
- ***At least start the process of creating a common vision and agreeing on shared values about the direction of the coalition.*** This is the first step toward developing the vision and mission statements that will define the coalition and guide its work.
- ***Discuss next steps.***
- ***Review the things to be done before the next meeting, and who has agreed to do them.*** It's important that people leave the first meeting feeling that something has been accomplished. If there are tasks being worked on, and specific results expected at the next meeting - even if those results are simply statements or preliminary plans to react to - coalition members will have that feeling.
- ***Schedule at least the next meeting.*** It may be possible to develop a regular meeting schedule at this first meeting, or it may make more sense to schedule only the next meeting and wait until the membership stabilizes and some other people join before creating a long-term schedule.

FOLLOW UP ON THE FIRST MEETING.

You've held a successful first meeting - terrific! The job of building a coalition has only begun, however. First, you have to follow up to make sure that there will be a well-attended second meeting at which work can continue.

- ***Distribute the minutes of the first meeting and reminders about the next meeting to those who attended, and send them out with invitations to potential new members as well.*** Try to widen your net as much as possible. Get to the folks you missed the first time, or to those whose names you've gotten from people who attended the first meeting.
- ***Follow up on the groups or individuals who are working on tasks assigned at the first meeting.*** Offer help, attend meetings, try to involve other people with relevant skills or knowledge - do everything you can to make sure those tasks get accomplished.
- ***If there are committees or task forces forming, try to recruit new members for them.*** The real work of the coalition will probably be done in these small groups, so it's important

that they have the right members. If you know people with expertise that could be used in particular ways, grab them. Most people will respond if they're asked, especially if they're asked because you value what they bring to the task.

- *Keep looking for new coalition members.*

NEXT STEPS.

There are a number of specific things - some of which you 've already started in that first meeting - that need to be done to make sure that the coalition keeps moving forward.

- *Finish creating vision and mission statements.* These can be hashed out in a small group after everyone has had input in a larger meeting, or you can actually try to generate them in the larger group itself (perhaps by splitting people up into smaller groups, then coming back together to reconcile differences). It's important that there be agreement on the wording and intent of these statements, because they will be the foundation of the coalition, referred to again and again over time as the group tries to decide whether to tackle particular issues. Everyone has to feel ownership of them if the coalition is to develop an identity.
- *Elect officers, or a coordinating or steering committee.* Once there's agreement about the structure of the coalition, it's time for members to decide whether they want some sort of governing body, and to choose it so that the work of the coalition can go ahead.
- *Community needs assessment.* More details to follow.
- *Community action plan.* More details to follow.

GENERAL GUIDELINES FOR GETTING A COALITION OFF THE GROUND.

In addition to the specifics above, there are some more general elements to starting a coalition:

- *Communicate.* Make sure that lines of communication within the coalition and among the coalition, the media, and the community are wide open. Open communication will assure that no one feels left out of the loop, and that everyone has the information necessary to make coalition efforts successful. Good communication with the media and the community will increase your chances for publicity and support when you need them.
- *Be as inclusive and participatory as you can.* Work at making the coalition a group in which anyone in the community will feel welcome, and continue to invite people to join after the first meeting. Try to involve everyone in the coalition in generating vision and mission statements, planning, and major decisions. The more people feel ownership of the coalition itself, the harder they'll be willing to work to achieve its goals, and the less

likely they'll be to allow turf issues or minor conflicts to get in the way of the coalition's progress.

- **Network.** Try to involve, or at least to keep informed, as many other groups in the community as possible. Let them know what you're doing, invite them to coalition meetings (to make presentations, if appropriate, or just to see what's going on), invite them to join if they're interested, educate them about the issue. If groups in the community are informed about your work, they're more likely to be supportive, and to tell others about what you're doing as well. They may also have better connections to policy makers than you have, and may be able to help you approach them.
- **Set concrete, reachable goals.**
- **Be creative about meetings.** Community activists and health and human service workers often feel that they spend their whole lives in meetings. If each coalition meeting can be different, and have some elements of fun to it, you'll be much more likely to retain both membership and interest in the coalition. Some possibilities include rotating the responsibility for meetings among the groups comprising the coalition; having only a small number of meetings a year, each with a particular theme, and doing most of the work of the coalition in committees or task forces; or regularly bringing in exciting presentations on the issue or in areas that relate to it.
- **Be realistic, and keep your promises.** If you are not sure you can complete a task, it is best not to say that you can. If you say you will complete a task, be sure you do.
- **Acknowledge diversity among your members, and among their ideas and beliefs.** Your coalition will probably mirror the cultural, economic, racial, ethnic, and religious diversity of your community, and will certainly represent a diversity of opinion. Not everyone will agree with everything the coalition does or wants to do, and sometimes the minority opinion will be the right one. Make sure to take everyone's opinion and restraints into account, and to **use diversity as a spur to discussion, rather than a source of division.**

By the same token, it's important that there be **a mechanism for getting things done when there is a disagreement**, whether it's a majority vote or some other mechanism. A long-term disagreement over strategy or tactics can hang up a coalition permanently, and make it ineffective.

- **Praise and reward outstanding contributions and celebrate your successes.** In addition to success itself, the celebration of success is a great way to cement the bonds among members of a coalition. Whether through individual or group awards, or through parties or other events, celebration of achievement will help your coalition thrive, and will give you a much-needed opportunity to remember that there's a reason you're doing all this.

IN SUMMARY

In situations where issues are too large and complex for a single organization to address, a coalition of groups and individuals working together may be the solution. A coalition can develop a coordinated response to an issue, increase the efficiency of service delivery, pool community resources, create and launch community-wide initiatives, build and wield political clout to influence policy, and work effectively toward long-term social change.

Coalitions should encompass all stakeholders - those affected by the work of the coalition and by the issue it addresses - as well as community opinion leaders, policy makers, and community members at large.

To start a coalition, it's best to begin with a core group and work outward, pulling in the necessary members mentioned above, as well as a more general membership from the community and from other, more peripherally-involved organizations. Holding an exciting first meeting at which there are real accomplishments and/or the work of the coalition is set in motion will help to launch the enterprise successfully.

Even more important is following up before the second meeting to make sure that groups are doing the work they said they would do, that attendance won't fall off, and that new members will be added. Areas that must be addressed are:

- An agreed-upon definition of the issue or problem the coalition is addressing
- The creation of vision and mission statements

Finally, you have to continue to pay attention to some general rules for forming and running a coalition:

- Communicate openly and freely with everyone.
- Be inclusive and participatory
- Network at every opportunity
- Set reachable goals, in order to achieve success
- Hold creative meetings
- Be realistic about what you can do: don't promise more than you can accomplish, and always keep your promises
- Acknowledge and use the diversity of the group

A coalition can be a powerful force for positive change in a community. If you can form one that lasts and addresses the issues it was meant to, you've done a major piece of community building work.

TOOLS

TOOL #1: LOGISTICS OF THE FIRST MEETING

1. Find a space that is comfortable, easily accessible, and big enough to hold all the people you expect. Some possibilities are agency or business meeting rooms; the public library; the YMCA; the town hall; service clubs (Elks, Rotary); a church or synagogue; a community center; the high school; or a local college or university.

Depending upon the reason for the coalition, you may want to try to hold the meeting in a place that is significant to the issue. A coalition on homelessness might meet at a shelter, for example; one on education might meet at a school. This might give members a chance to look at the issue firsthand, and might also help to set the tone.

2. At the same time, decide when and how long the meeting will be. The time of the meeting should be geared to the needs of the people who most need to be there. The length of the meeting depends on what its goals are. If there's substantive work to be done, it should be long enough to accomplish it, or at least to get a good start.

In general, it's a good idea for a first meeting to have a practical goal of some sort. It doesn't have to be huge - deciding who else should be in the room, for instance, or naming a group to draft a statement of the issue for others to edit at the next meeting - but people should leave with some sense that the meeting had a real point.

3. Think about how to arrange the space. Will chairs be in a circle? In rows, with the core group at the front? In small groups? Each of these arrangements makes a statement about how the coalition will operate. Our suggestion is that a circle is much more in keeping with the nature of a coalition, in that it implies no one leader, but assumes equality among members. It leaves open the possibility of different individuals or organizations taking leadership in different circumstances, and encourages a democratic process.

An important element is the availability of food and drink. The presence of food changes the climate of a meeting, making it more informal and encouraging interaction among those present. In addition, if the meeting is going to be long, food and drink will help people remain alert and make them more likely to stay till the end.

4. Decide who will run the meeting.

- A member of the core group

- A community official or community leader
- Someone connected very closely with the issue (the director of the agency most directly responsible for it, for instance)
- A coalition member with particularly good facilitation skills
- An outside facilitator

Whoever is chosen should have good facilitation skills. She has to be able to make sure everyone is heard, that the discussion moves along, that the group addresses agenda items, and that the meeting is kept civil and productive. Perhaps most important, she should be flexible enough to change direction when it's necessary, and savvy enough to know when it's necessary.

The first meeting of a new coalition is always uncharted territory, and can be dangerous if the coalition doesn't have a competent facilitator. The meeting can be pulled from its course to pursue the concerns of a determined or single-minded individual, or can become bogged down in procedural issues or in unnecessary conflict. A good facilitator - particularly one who also has credibility among coalition members - can keep the meeting on the right track and help to assure the eventual success of the coalition.

And don't forget to make sure that someone takes minutes. The ideal is to ask someone beforehand to do it specifically for the first meeting, with the understanding that the group will then either appoint a secretary, or create some other procedure to assure that meetings are properly recorded.

5. Arrange for child care, transportation, or other services that some people may need in order to attend the meeting. This may be especially important if you're trying to attract young parents or low income community or target group members.

6. Finally, make sure that everyone knows about the time and place of the meeting. Even if people were told when they were first contacted about the coalition, send a reminder, or call again, or both. For most busy people, until something is in their appointment books, it doesn't exist. If the time and place are already written down, a reminder will help to cement the idea of the meeting in people's minds.

TOOL #2: DEFINING YOUR COALITION'S MEMBERSHIP *by Tom Wolff*

The definition of coalition membership varies widely. Often the mission or funding of a coalition predetermines who the membership will be. Generally in AHEC/Community Partners coalitions, the mission is defined as improving the quality of life in the community. Under this broad statement, anyone in the community who is willing to work on improving the quality of life in that community is considered eligible to be a member.

You can consider the following issues to clarify the limitations and opportunities created by certain definitions of membership.

ADDRESS THE ISSUES OF INCLUSION AND EXCLUSION

The group development literature informs us that inclusion and exclusion are key variables in the start-up of any group. Coalition start-ups are no exception. Initial coalition discussions about who should be invited, and who should not, are often among the coalition's first decisions.

If the goal of the coalition is to mobilize as many resources from as many sectors of the community as possible to work on community issues, then one needs to make initial membership decisions that would create a sense of equal access to the coalition. Developing and maintaining the open membership system requires a constant examination of coalition practices. Do new members get introduced when they arrive? Do they feel welcome? How does one bring new members up-to-date on what's happening?

If coalitions limit who can be members, who can be on steering committees, whose resources they are interested in tapping, then by definition they are excluding people from the community and the coalition will not be able to tap into those people's capacities and resources to solve the community's problems.

DECIDE HOW MONEY RELATES TO MEMBERSHIP

Many coalitions ask people who are members to show their support by paying a fee to cover coalition expenses. How the issue of money and membership is constructed will have a large impact on the coalition. If the coalition sets the fee as a membership fee, then it says a member is one who pays the fee. An alternate approach is to say that anyone who supports the mission of the coalition and signs up as a member is a member, and those who are able to provide financial support become sponsors of the coalition. This separates the issue of membership from financial support.

By setting a fee as a membership criteria, one potentially eliminates low-income citizens, even if one establishes a scholarship or sliding fee scale, since having to make requests for that can be a humiliating experience.

CLARIFY EXPECTATIONS ABOUT MEMBERS' ACTIVITY LEVELS

Although membership can be claimed by those who sign up as members or those who send financial support, the key component of coalition membership is activity. Without coalition members providing their time and their efforts, there is no coalition. Thus, a key factor in the success of any coalition is the amount of energy and time invested by its members in the community. No matter how many people have paid their dues, if you cannot get members to sign up for activities and task forces, the projects that the coalition takes on will fail.

STRIVE FOR A MULTI-SECTORAL, MULTI-CULTURAL COALITION

How well the coalition membership represents the various sectors and subcultures of a community is another key variable in membership. For membership to be truly representative, efforts have to be made to reach those who don't easily come to coalition activities.

The hardest to reach individuals tend to be those at the very top of the power structure--the heads of corporations, police chiefs, superintendents of schools--and those at the very bottom of the power scale--the disenfranchised, the citizens. Specific efforts involving individual, personalized outreach need to be focused on those groups not well represented, so the coalition can be both multi-sectoral and multicultural

ENGAGE CITIZENS

Although coalitions proclaim themselves as empowering institutions, giving voice to the members of the community, they often fail at involving citizens in their efforts. Coalitions are often quite successful at engaging certain components of a community to interact in daytime meetings, in formal settings. But this approach presents enormous barriers to involving grassroots citizens, barriers including: time, money, language, family responsibilities, transportation, etc.

There are no simple answers as to how to best engage citizens in coalition activities. To change the meetings to evenings and provide interpreters and day care may be ways of enticing citizens to a meeting, but one is likely to lose many human service providers with after-work events.

The strength of a coalition is really the sum of the capacities of its members. Seeking a broad representation of active members and maintaining an open door are critical to coalition success.

TOOL #3: INCLUDING DIVERSE PARTICIPANTS

Effective community collaborations must identify the diversity of the community (racial, ethnic, gender, class, etc.) and find ways to celebrate this diversity. Effective coalition action requires engaging and understanding the whole community.

Collaborations often declare that their goals include:

- Celebrating the diversity within a community,
- Being inclusive of all members of the community,
- Encouraging the participation of all the sectors in a community.

Yet many collaborations struggle to bring this diversity into their midst. Although they declare themselves to be open to all members of the community, in practice they represent the majority, the formal structure, and established power brokers, rather than the community at large.

For other collaborations, the issue of diversity and inclusivity may not be high on their priority list, but may be brought to them by members of sub-groups in the community who feel excluded.

Inclusivity Checklist by Beth Rosenthal, M.S

The Inclusivity Checklist developed by Beth Rosenthal (1997) is an instrument that assists collaboration members in analyzing the issues of inclusivity and diversity across a wide range of their collaboration activities. The easiest and most obvious way to gauge your group's success in this area is to look around a room at a collaboration or a steering committee meeting. Is the diversity of the community represented in terms of race, gender, ethnicity, age, etc.

Instructions: Use this Inclusivity Checklist to measure how prepared your coalition is for drawing strength from diversity, and to identify areas for improvement. Place a check mark in the box next to each statement that applies to your group. If you cannot put a check in the box, this may indicate an area for change.

The leadership of our coalition is multiracial and multicultural.

We make special efforts to cultivate new leaders, particularly women and people of color.

Our mission, operations and products reflect the contributions of diverse cultural and social groups.

We are committed to fighting social oppression within the coalition and in our work with the community.

Members of diverse cultural and social groups are full participants in all aspects of our coalition's work.

Meetings are not dominated by speakers from any one group.

All segments of our community are represented in decision making.

There is sensitivity and awareness regarding different religious and cultural holidays, customs, recreation and food preferences.

We communicate clearly, and people of different cultures feel comfortable sharing their opinions and participating in meetings.

We prohibit the use of stereotypes and prejudicial comments.

_____ Ethnic, racial and sexual slurs or jokes are not welcome.

If the assessment indicates that, although the coalition has declared itself to be inclusive, it is falling short on that goal, there are many steps that can be taken. One obvious way to proceed is to commit resources to increasing the engagement of various community groups with the coalition. We have seen four very effective ways for this to happen:

- Provide mini-grants to community groups
- Hire community outreach workers from the community you wish to engage
- Provide a community organizer to the community
- Develop leadership training programs for community leaders

Tool #4: Principles for Coalition Success *by Tom Wolff*

Identifying one set of principles for successful coalitions is quite a challenge because of the great variety in what is called a "coalition." Not only do the definitions of coalition vary (from two agencies joining together in a grant submission, to a broad community group with representatives from every sector), but definitions of coalition success vary as well (i.e., we have succeeded if we get the Chief of Police to join our coalition vs. we have succeeded if we get the Chief of Police fired).

That said, there are a few general principles that can be adapted for most coalitions and partnerships.

CLEARLY DEFINE YOUR SHARED MISSION AND GOALS

Coalition members should clearly define their shared mission and goals to make sure that the identified goals incorporate the self-interests of the various constituencies. Coalition building requires both a willingness to set aside personal agendas for a common good, and a realistic understanding that addressing the self-interests of participants is crucial. Walking the tight rope between these agendas is critical to coalition success.

INCLUDE DIVERSE MEMBERS

Membership in coalitions needs to be inclusive, allowing all members of a community who endorse the coalition's mission to join in its efforts. Inclusive membership will occur only through active recruiting of the two power extremes in the community—the most powerful (business, clergy, city hall representatives, etc.) and the least powerful (members of neighborhood groups, youth, people of color, the poor, etc.). The geographic boundaries of the coalition will also be decided by those directly involved.

PLAN FOR ORGANIZATIONAL COMPETENCE

The coalition's organizational functioning and structure must be clear and competent enough so that the coalition can perform basic tasks effectively. This includes:

- Effective leadership. Coalitions need to have clearly identified leadership structures, but also need to share leadership as broadly as possible. Building new leadership is a crucial role for coalitions, especially among community groups which have been disenfranchised.
- A clear, democratic decision making process, which allows for broad input into decisions and for conflict and disagreement to occur and be resolved.
- Most broad coalition efforts require experienced staff. The staff must have group and organizational process skills and community development philosophy and skills.
- Coalitions must develop at least a rudimentary ongoing system of planning.
- Active and effective communication is critical. This should occur both among members of the coalition and between the coalition and both the community and outside systems (i.e., the State).
- Mobilization and effective use of resources from within the coalition (as well as from outside) is essential.

FOCUS ON "DOABLE" ACTIONS

Successful coalitions plan and carry out actions that are doable and thus prove their effectiveness to themselves and their communities through concrete results. Early achievements or victories will illustrate to the members and the community that change can occur. A short agenda of doable tasks also prevents a coalition from spreading itself too thin.

AFFIRM AND CELEBRATE!

Coalition activities need to include fun and must affirm the strengths and joys of the community. Indeed, one of the great gifts of effective coalitions to their members and to their communities is the gift of hope. This emerges from an optimistic coalition approach, one that says most problems can be effectively addressed. Leaders will help emphasize the hope and accomplishments of the coalition, as well as its process.

BE REALISTIC ABOUT TIME, AND PERSIST

The agendas of broad coalitions that address the quality of life in communities can be overwhelming. The members need to take a long-range view, understanding that the coalition's agenda will take time and persistence. Although some single-issue coalitions are defined as short-term efforts, most coalitions require longer time frames to create the needed societal changes. Tackling big issues in manageable pieces holds for both long- and short-term efforts.

MONITOR AND ASSESS

The process of developing a coalition to address quality of life issues in a community is very complex. The literature can provide us with some direction, but each coalition effort must be guided by its own internal review and evaluation process. Whether this review is done at an annual meeting discussion of the coalition's process and outcomes or through a more rigorous evaluation scheme, an effective coalition will have the capacity to learn from its successes and its disappointments, for it surely will have both.

Part Three: Additional Resources

- Prevention Institute 8-Step Guide:
http://www.preventioninstitute.org/index.php?option=com_jlibrary&view=article&id=104&Itemid=127.
- Society for Public Health Education Coalition Guide Resource:
http://www.sophe.org/healthy_communities.cfm.

Part Four: Case Studies from Cross Sector Work on Obesity Prevention, Weight Maintenance, and Treatment—
<http://iom.nationalacademies.org/Activities/Nutrition/ObesitySolutions/2014-SEP-30.aspx>