



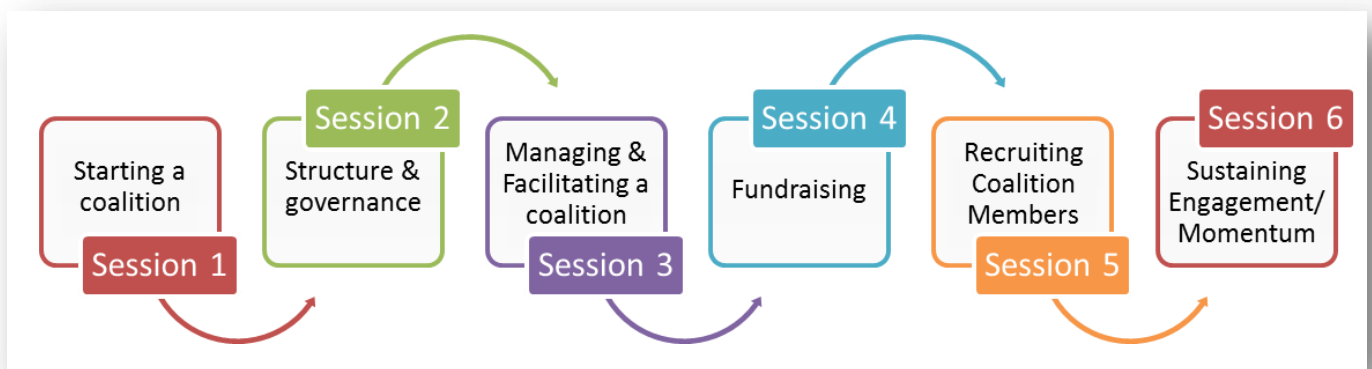
LESSONS AND INSIGHTS

Network Learning Group on Coalition Building
September 2013- February 2014

Background

In the fall of 2013 and winter of 2014, 16 leaders from 11 Assets & Opportunity Network Lead Organizations participated in the Network’s first-ever informal learning group, which focused on sharing experiences, lessons and challenges related to building assets coalitions. The six sessions, which focused on the topics that responded to participants’ learning goals, were structured to include peer case studies and expert advice, interactive discussion and sharing of model documents and resources. The group was facilitated by two Network leaders, Kaye Schmitz from the Florida Prosperity Partnership and Lisa Forti from Alameda County Social Services. Lisa and Kaye are also both part of the Assets & Opportunity Network’s Steering Committee.

The six sessions of the Learning Group focused on the “lifecycle” of a coalition:



Session 1: Starting an Asset-Building Coalition

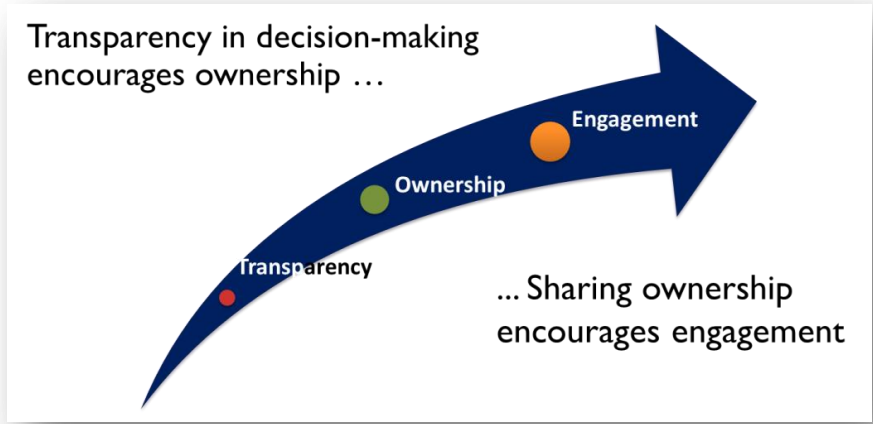
Maxims for Coalition-Building Success

Session 1 set the stage for future conversations with a discussion of three maxims—general principles or truisms—that are important to keep in mind as you build a coalition: communicate, be transparent and demonstrate value.

Communicate: Communicate consistently (but with restraint) to maintain engagement and build enthusiasm around special opportunities.



Be Transparent:
 Transparency in the decision-making process encourages ownership and sharing ownership encourages engagement.



Demonstrate Value: Do only what organizations can't do on their own. Be the bridge to enhance existing services, don't become a competing service provider. Consistently ask the question: what is the coalition bringing to the table?

Getting Started: Ideas for “First Steps”

Asset-building coalitions have been around for more than a decade. However, the context from which they emerged has changed over time. Whereas the earliest asset-building coalitions generally grew out of networks of Individual Development Account (IDA) service providers, those that were formed later often began as local Volunteer Income Tax Assistance (VITA) coalitions, and the most recently developed coalitions have emerged in response to the framework and opportunities presented by the Assets & Opportunity Network. While the initial *raison d'être* for IDA or VITA coalitions was quite clear—to coordinate services and increase the impact of that specific service—more recently formed coalitions must go through a process to figure out what purpose they want to serve, who should be at the table and what activities they should undertake. To sort through those questions, newer coalitions have taken a variety of approaches to get their groups off the ground, including the following, which offer lessons for others.

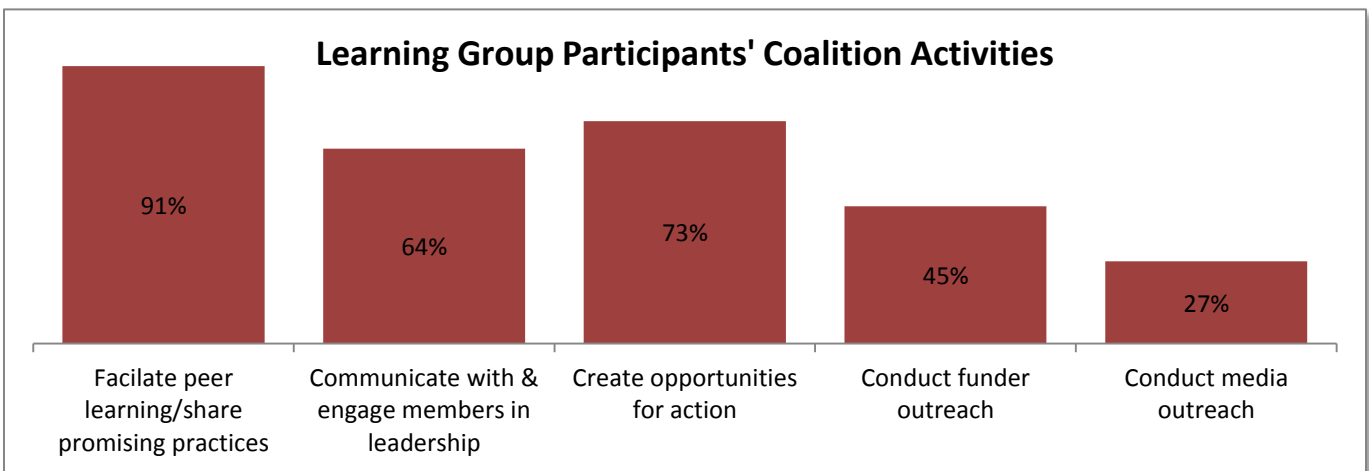
1. **Create an interim leadership group** to develop vision, structures, etc. While it is important to keep the leadership structure porous enough so that newer stakeholders feel welcome and involved in shaping coalition direction, some initial structure is essential in order to articulate, in broad terms, the “why, who and what.” Without those broad principles defined, potential members may feel as if there is no “there there” and be reluctant to participate.
2. **Listen.** It is important to get input from a range of stakeholders on what your community's strengths and weaknesses are, how a coalition could improve outcomes, and whether there is interest in helping to shape and lead an emerging coalition. These conversations can be one-on-one, in small groups or in larger community meetings. Some emerging coalitions have hosted community listening sessions or

conducted community surveys as a way to get broad community input. Others have gone through the process of mapping existing services as a way to identify the services and referral processes that already exist and where the gaps are. Allowing participants to contribute to a “map” of services can increase their investment in and commitment to working together.

3. **Ask for advice** from those you want to include in your coalition. Doing so not only shows respect for your stakeholders’ own experiences working with their coalitions, but it also invites ownership. Asking potential funders for advice early on builds relationships that may lead to funding down the road.

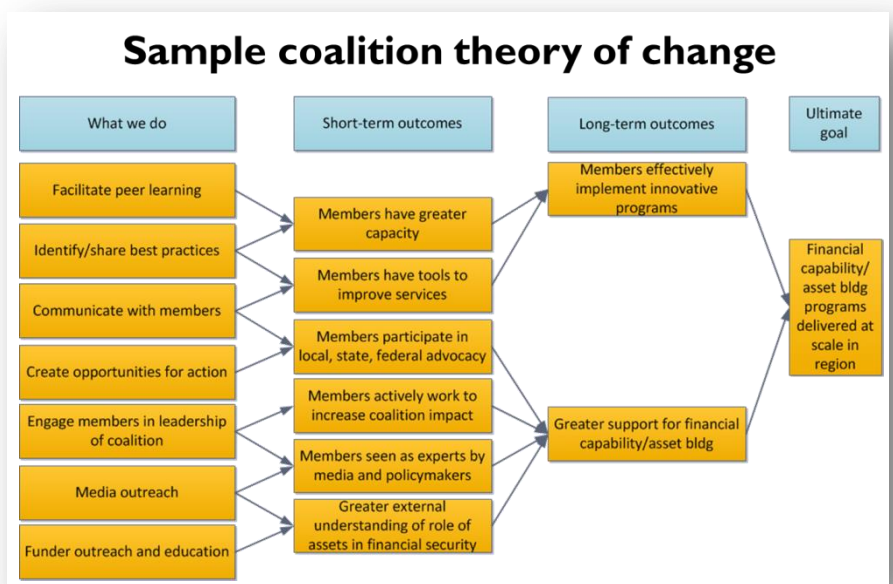
So, What’s Next?

After emerging coalitions have taken the initial steps to get input and participation, a next step is to figure out what your coalition will do. For example, will you share information? Will you create opportunities for members to learn from each other? Will you take collective action on local, state or federal policies? Will you streamline service referral in your community? The chart below shows the percent of Learning Group participants who engage in a variety of common coalition activities.



While it is important to reach agreement on strategies and activities early on, it is equally important to effectively articulate how those strategies relate back to the long-term goal of your coalition. In order to attract new members—and funders—it is critical to show and communicate the “so what” of the coalition.

Linking activities to goals:
Developing a theory of change can help emerging coalitions identify possible activities and show the connection between what the coalition does and the outcomes it seeks to achieve.



Peer Case Study: Getting Started

Amy Williamson, Mutual Housing California

Amy Williamson is the Community Relations Coordinator at Mutual Housing California and Steering Committee Member of the Sacramento Region Assets & Opportunities Network.



What was the problem you were trying to solve by creating a local coalition?

Sacramento was hit hard by the housing crisis and the financial collapse. When CFED launched the Assets & Opportunity Network, it seemed like the best chance to create comprehensive coordination to increase capacity in the area. The A&O Network gave Mutual Housing California a reason to be represented in Sacramento. Mutual Housing California also saw the Network as a place to collect information on the coalition-building process.

What was your process for getting started?

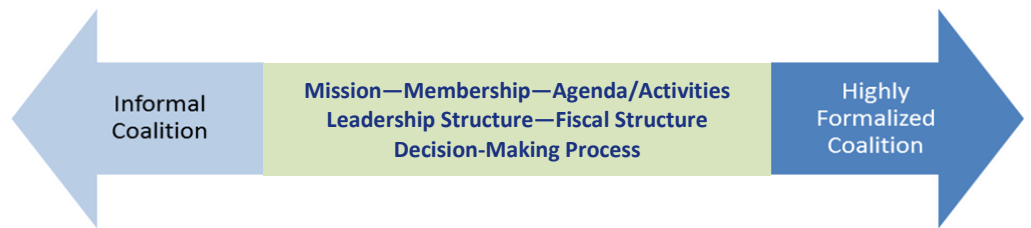
At the 2012 Assets Learning Conference, Amy reconnected with others from the Sacramento area and, together, they decided to take a proactive approach to building a coalition. She reached out to people in the area to form a Steering Committee. A leader from Goodwill of the Sacramento Valley & Northern Nevada, Ed Durkee, shared their [Labor Market and Financial Capability Outcome Scale Matrix](#) with the Steering Committee. At a meeting in December 2012, the Steering Committee used the matrix to engage community stakeholders in mapping where the region was effectively delivering services and where there were gaps. The results were both improvements in the referral process between groups, as well as identification of potential coalition members.

What were the early challenges/successes you had to overcome?

One challenge was staff turnover: several people who were instrumental in forming the coalition moved out of the Sacramento area. Another was the realization that within the Steering Committee, there was uneven capacity to do the work of building a coalition. We continue to navigate who does what and who has a seat at the table. Despite these challenges, the Committee intends to do strategic planning and more active fundraising in the near future.

Session 2: Coalition Structure & Governance

Among Learning Group participants, there was a fairly even split between those who categorized their coalitions as informal, somewhat formalized and highly formalized. Where along this continuum a coalition



falls depends on their approach to a number of issues, including whether the coalition has articulated a mission, formalized its membership, and agreed on an agenda or defined activities. It also depends on whether they have articulated a leadership structure, fiscal structure and decision-making process. While some coalitions aim to eventually become more formal—their current “informality” being a function of their early stage of development—others have intentionally made the decision to remain less structured.

Peer Case Studies: Membership, Structures, Roles and How Decisions Get Made

Ashley James, Alameda County Community Assets Network; Cynthia Zwick, Arizona Assets Alliance



Ashley James is a Program Associate for Urban Strategies Council and is the Coordinator of AC CAN in California.

Cynthia Zwick is the Executive Director of the Arizona Community Action Association and Co-Chair of the Arizona Assets Alliance.



How is your coalition structured?

Ashley: AC CAN has 30 General Members and 10 core active Committee Members. Committee Members participate in the Steering Committee and Ad Hoc Committees. AC CAN has quarterly stakeholder convenings of its General Members.

Cynthia: Arizona Assets Alliance is a new coalition, and is still developing its structure. As of now, we have eight Leadership Team Members who identify issues to focus on and are elected for two 2-year terms by the full membership. There are 60 Coalition Members who meet quarterly. There is a Public Policy Team and an Education & Training Committee. Every month the Alliance has “Lunch & Learn” opportunities at no cost, open to anyone.

What are the roles and responsibilities for each of those types of members?

Ashley: The Chair of the Steering Committee works with me, as Coordinator, to lead AC CAN. The Program Chair works on recruitment and works with the Steering Committee.

Cynthia: The Leadership Team sets the agenda and identifies priorities throughout the year. These priorities are taken back to the full Alliance and then we vote on some issues (such as engaging in policy and electing the leadership team).

How do decisions get made?

Ashley: The only time AC CAN members take a formal vote is when it concerns giving out funds. Otherwise, we use consensus decision-making.

Cynthia: The Alliance votes on some issues, but uses consensus decision-making for others.

What is the process for new members to join the coalition?

Ashley: Interested organizations complete an [application](#) and our Steering Committee reviews and approves applications by consensus; in the past, we had a yearly dues requirement, but recently removed that requirement.

Cynthia: As long as people are interested, Arizona Assets Alliance welcomes them. The coalition also conducts recruitment throughout the year and honors people’s decision to depart. Arizona Assets Alliance’s “Lunch & Learn” events draw some members and we also work to identify who else is engaged in this work and may want to join.

Coalition Fiscal Structures

The peer case studies above describe two approaches to the issues of governing structure, roles, decision-making and how they define “membership.” Another important decision a coalition must make is about its fiscal structure. Informal coalitions may decide to have no fiscal structure. However, as soon as there is a need for money to change hands—whether that is to hire a coordinator or to collect membership dues—some fiscal structure is necessary. The most common approach is to identify another organization (often one of the coalition members) to serve as the fiscal agent. However, a handful of coalitions across the country—the Florida Prosperity Partnership, RAISE Texas and the Washington Asset Building Coalition are three examples—have chosen to become an independent 501(c)(3). Each of these structures has advantages and disadvantages. The table below summarizes Learning Group participants’ comments.

Learning Group Participant Comments on Pros and Cons of Each Fiscal Structure

No Fiscal Structure		Fiscal Agent		501(c)(3)	
Pros	Cons	Pros	Cons	Pros	Cons
“More fluid and can be flexible to meet coalition needs”	“Limited funds, which can mean limited activities”	“Simpler than going through the hassle of creating a 501(c)(3)”	“Can be difficult to balance funding as a fiscal agent”	“Separate responsibility and liability from other organizations”	“It is more important for 501(c)(3)s to raise funds because they have to pay staff”
“Less time consuming”	“Limited buy-in and expectations of members”	“Fiscal agents can be strong networkers”	“Cannot have the same funding as a coalition”	“Can put organizations in a better fundraising position”	
	“Difficult to brand”				

Reflections, Insights and Concerns on Fiscal Structures

“Local coalitions can piggy back off of a statewide 501(c)(3) coalition by having them be the fiscal agent.”

“Our informal coalition is considering becoming more formal. However, our members are concerned about the competition for resources, particularly between the coalition and individual organizations.”

“We have a membership fee to support operations; it varies (\$0-\$4,000) based on level of participation.”

“We have a newly-formed steering committee and are considering an informal membership structure. After our launch event, we will gather input from all of the potential coalition members to decide.”

Session 3: Managing and Facilitating a Coalition

Once you've gotten your coalition off the ground, it's likely time to turn your attention to ensuring that coalition members are actively and productively engaging in the coalition—both during coalition meetings and during the times in between meetings. Although it is, of course, ultimately up to coalition members themselves whether they actively participate, as a coalition leader, there are some effective practices you can employ and common pitfalls you can avoid to successfully get and keep people engaged. In fact, behavioral research has some important insights for building a coalition and facilitating meetings.

Guest expert: Insights for Coalition-Building from Behavioral Science

Pamela Chan, CFED

Pamela Chan is a Senior Program Manager for Applied Research at CFED.



A Quick Overview of the Relevant Research

Humans are wired to join groups.

- Social brain hypothesis in evolutionary biology suggests that our brains may have been specifically developed for the purposes of managing social groups and coalitions. ([Slate article](#); [Scientific American article](#))
- Current research suggests that we respond psychologically and biologically to social interactions. ([ScienceDaily article](#); [Personality and Social Psychology Bulletin article](#))

Groups can be formed very easily.

- Group formation requires only activation of very loose linkages. Social groups can be formed on the smallest of commonalities. Studies looking at social identity found that people can start classifying themselves into a group and establishing an “us versus them” mentality on small characteristics such as one’s camp cabin assignment or preferences for a painting. (Click [here](#) and [here](#) for examples.)
- Group formation happens even if it’s not in person. Facebook, for example, has similar characteristics to in-person communities. ([ScienceDaily article](#))

Yet, they also tend toward “social loafing” and “groupthink.”

- Social loafing is when people do not work as hard in groups as they would when working alone. It arises when people do not feel the link between their effort and the final outcome ([Plous](#), p. 193).
- Groupthink is when people in a group try to minimize conflict and reach a consensus decision without a critical evaluation of alternative viewpoints. It occurs when groups are cohesive and relatively insulated from the influence of outsiders. Group loyalty and pressures to conform lead people in the group to think less critically, reduce reality checks and rationalize their moral judgment in a different way than they would when working alone ([Plous](#), p. 203).

Behaviorally Informed Tips for Coalition Building

Outreach to new stakeholders

- *Use recruiters that are similar to your target member.* If recruiters use similar traits to relate to a target member, they are more likely to get a positive response. Find someone that's similar to the target or find a way to establish a commonality with them before making your ask.
- *Get positive reviews.* People are influenced by positive opinions and less swayed by negative opinions. Get some positive reviews of your group—it might have a multiplier effect on the way others see you. But, don't stress out if there are a few negative comments out there too.
- *Create a meaningful membership requirement to join.* People like groups more if it costs them a lot to get in because they relate level-of-effort to the quality of the group. Consider including a meaningful membership requirement, such as an application or interview, in your process.
- *Check the validity and persuasiveness of the coalition's activities and materials.* Remember that groupthink can easily creep in to coalition decisions. Make sure your materials resonate with people who haven't yet "drunk the Kool-Aid."

Encouraging commitment and action

- *Be giving—especially at the beginning.* Providing an incentive to act—even *before* the person has accomplished the action—is an effective way to get people to participate. People's tendency is to respond in-kind when they experience niceness or generosity.
- *Identify clear, common goals for everyone in the group.* People tend to work together more if they know the end goal. It is a simple tip, but one you should make sure not to forget.
- *Create individual opportunities for public commitment to set the stage for bigger asks.* People like to be consistent in their actions and beliefs and will thus be consistent with their commitments even if they are loosely associated. Before you ask people to take a specific action, think about ways you might be able to prime them with this consistency principle in mind.

Avoiding the pitfalls of group dynamics

- Have group leaders refrain from stating any personal preferences at the onset.
- Explicitly encourage dissent and criticism.
- Appoint someone to be a devil's advocate.
- Periodically discuss the group's deliberations with trusted associates and report back to the group.
- Set up other groups—with other leaders—to consider the same questions.

Tips for Facilitating Effective Coalition Meetings

Effective meeting facilitation is a critical skill for coalition leaders as it helps keep people engaged, ensures they feel heard and makes productive use of your time together. On the following pages are a set of suggestions that are drawn from Lisa Forti's experience as the former Coordinator of the Alameda County Community Assets Network, as well as literature on participatory decision-making, including *Facilitator's Guide to Participatory Decision-Making*, by Sam Kaner. Lisa's suggestions are organized to follow the arc of a typical coalition meeting.

Peer Advice: Tips for Facilitating Effective Coalition Meetings

Lisa Forti, Alameda County Social Services

Lisa Forti is the Policy Director for Alameda County Social Services, a Steering Committee Member of AC CAN in California and Co-Facilitator of the Learning Group.



Opening a meeting

Start with a check-in. It can be something personal (e.g., the mood each person is in) or fun (to help break the ice and help people get to know each other), or it could be related to the meeting topic. Check-ins build group cohesion and empathy. They help people transition from focusing “outside the meeting” to “inside the meeting” and to be fully present, rather than thinking about their to-do list of tasks that need to be accomplished once the meeting is over. They are also a way to get everyone talking early, which can promote active engagement throughout the meeting.

Establish ground rules/agreements. You can start with a list that you’ve come up with and ask participants to add their ideas. A starting list of ground rules might include: start and end on time. Assume a “positive intent” in other people’s comments. “Step up and step back” — meaning that those who don’t usually contribute should step up and those who are usually more vocal should step back. Apply the “100-mile rule” — which is the request that participants inform those they work with that they shouldn’t be interrupted unless it’s for something important enough that they would be interrupted *100 miles away* from the office. And finally, when speaking after someone else in the group, start with “yes, and ...” rather than “yes, but ...”

Clarify and get agreement on the goals of the meeting. Provide context and an overview of the overall goal of the group. Share proposed topics. Ask participants if they have anything to add to the agenda.

Increasing participation and capturing discussion

Chart writing. Capturing people’s ideas in writing promotes “group memory” and validates each person’s contribution. Some tips for effective chart writing include: use capital/block letters. Alternate colors between ideas, and/or use a more neutral color for capturing ideas and a brighter color for actions or decisions. Use bullets to break up ideas. Use visual formats or pictures to describe concepts (e.g., matrices, flowcharts or orbit diagrams).

Design Thinking. Design thinking is a method for practical, creative resolution of problems or issues where the objective of the discussion is to reach a larger goal, rather than solving one specific problem.

Brainstorming. Sticky-note exercises or small group/individual brainstorming are great ways to keep your coalition focused on generating ideas and finding solutions to shared problems. Don’t let meetings just become a series of updates on what people are doing.



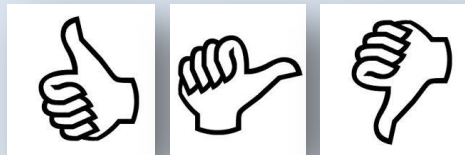
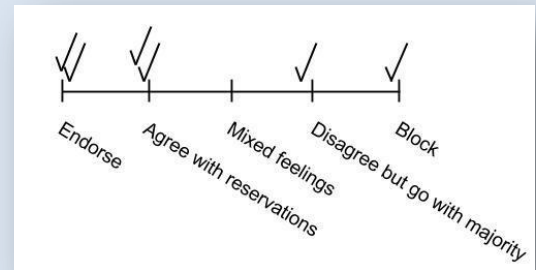
Small groups. Small groups allow those who are more reserved in larger groups to participate. They are also an effective strategy for accomplishing more work in a short amount of time.

Ask for volunteers to lead each meeting. Doing so allows people to get to know each other better and provides opportunities for people to take a leadership role and dive deep into the content.

Building consensus and making decisions

While a coalition may decide that a leadership or steering committee will make most decisions, the ability to reach consensus within a group is indispensable. There are many types of consensus-building activities, including the two examples shown here.

Gradients of agreement—scales that range from endorse to block—allows you to assess strength of support for or opposition to an idea.



Modified gradients of agreement—such as the one shown at left—are a quick way to take a pulse of the room and understand generally where each person stands.

Closing and capturing a meeting

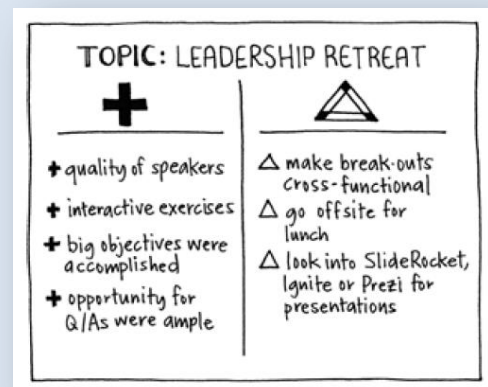
Review agreements, next steps and assignments to make sure everyone walks away knowing what happened.

Identify topics and/or goals for future meetings.

Do a meeting evaluation. Meeting evaluations can be quick and informal. They give you valuable feedback on how you are running your meeting. Including evaluations makes people feel invested and heard.

Send out timely notes. Notes should include the major topics discussed, decisions made and next steps and assignments. Rarely is it necessary (or preferred by the reader) to share a detailed narrative of the entire meeting.

Evaluate the meeting as a group. Rather than using a “good/bad scale,” a “worked well/change for next time” can produce more constructive feedback



Keeping Members Engaged in Between Meetings

The final part of Session 3 focused on ways to keep coalition members engaged in between meetings. A lot of momentum can be lost if the only time members think about coalition activities, actions and goals is when they are in the room. Learning Group participants discussed the strategies they use, and shared effective communication mechanisms and the challenges they face.

Keeping Members Engaged Between Meetings

“I reach out to board members after meetings with a bold subject line such as “action item” and then bold the date they need to respond by within the email.”

“I form an email chain between participants to update them on coalition activities.”

“Personal relationships and one-on-one contact promotes commitment that encourages action and participation.”

“Our staff communicate with members twice monthly and engage with them one-on-one or in small groups when opportunities arise.”

“We communicate with members via listservs, phone calls, webinars and in-person meetings. This way, we cater to different communication preferences.”

Session 4: Fundraising

All nonprofits have a perennial need to raise funds to accomplish their work. However, coalitions of nonprofits (and private sector and government entities) have the added challenge that coalition work is often less tangible than direct service work. Coalitions must also be more steadfast in their commitment to not directly competing for funding with coalition members.

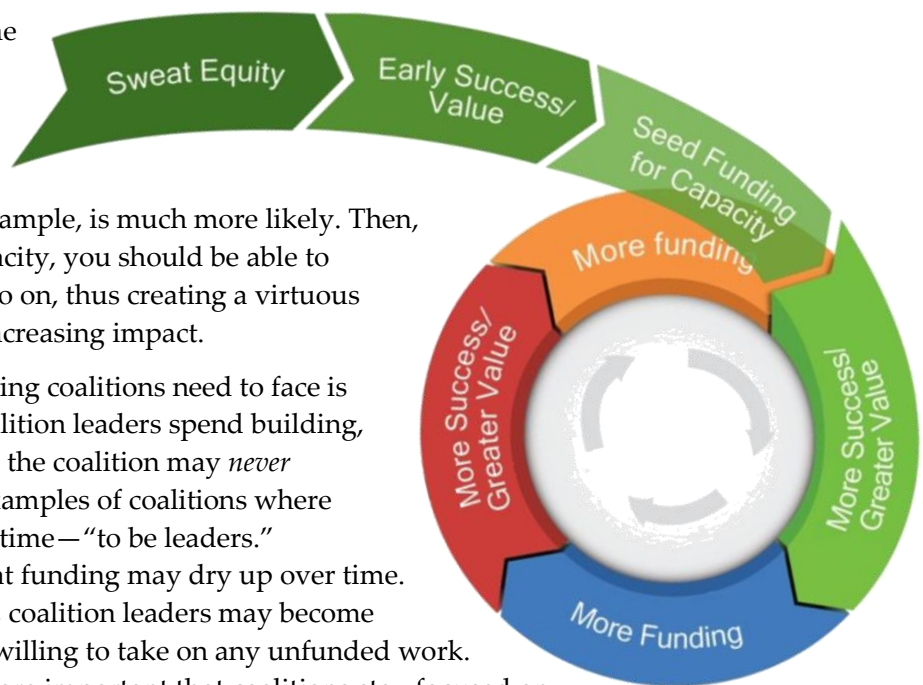
Session 1 took on some of these issues and suggested ways to address them. For example, a strategy for making coalition work more tangible is to clearly articulate your coalition's value and impact. A theory of change that connects activities to community impacts can help. One strategy for avoiding competition with members is to limit coalition activities to *only* those things that individual organizations can't do on their own. To those ideas, Session 4 added two more. One strategy is to ask coalition members and leadership to be as transparent as possible about their own fundraising. Another is to educate funders, ideally as a unified group, about how the coalition's work enhances individual organizations' work, but does not replace it.

Facing the Facts: Coalition "Startup" Money is Unlikely, Demonstrating Effectiveness is the First Step

It is very rare for an emerging coalition to be able to secure funding before it has a track record of success. To get a coalition of the ground, more often than not, requires a core group of leaders to lend their time without the expectation that they will be compensated. Often, however, the proposition of volunteering your time is met with resistance from your boss (or your Board, if you're the boss). Most nonprofit staff have limited flexibility to do work that isn't "billable." Thus, convincing your own organization that building a coalition is worthwhile is often necessary.

The good news is that once your emerging coalition has put in some "sweat equity," you can start showing real results. With something concrete to show for your efforts, getting seed funding for a part-time coordinator, for example, is much more likely. Then, once your coalition has more capacity, you should be able to demonstrate greater impact and so on, thus creating a virtuous cycle of increasing funding and increasing impact.

The other bit of reality that emerging coalitions need to face is that funding to cover the time coalition leaders spend building, shepherding and driving forward the coalition may *never* materialize. There are certainly examples of coalitions where leaders are funded—at least for a time—"to be leaders." However, experience suggests that funding may dry up over time. If and when funding does dry up, coalition leaders may become parsimonious with their time, unwilling to take on any unfunded work. This reality makes it that much more important that coalitions stay focused on providing tangible value to their members in other-than-monetary ways.



In-Kind Support

Until you've raised dedicated funds, don't overlook sources of in-kind support. In your community and nationally, there are institutions that share your goals, and which have in-kind resources to share.

For example, the community development staff of the Federal Reserve Bank or the FDIC may be able to provide meeting space, refreshments and print materials. An "anchor institution" — often a large-scale/high-capacity service provider — may not only be able to provide space, but may also be able to lend some administrative support. The Assets & Opportunity Network provides connection to peer experts, an easy-to-set-up web presence, learning events and occasional scholarships.

Finally, make sure that you are leveraging the expertise of individual coalition members. Each member doesn't need to be an expert in policy advocacy or social media or meeting facilitation, as long as you've got at least one person with the right skills and expertise to lead work in each area.

Potential Sources of In-Kind Support

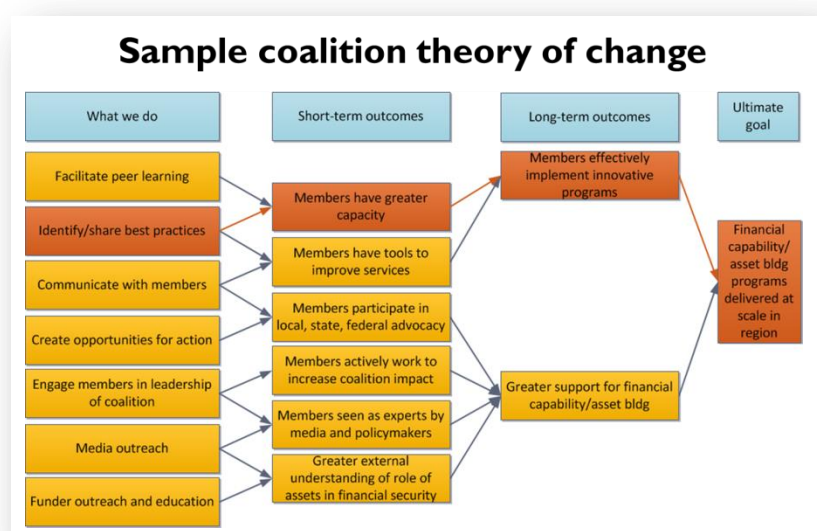
	Event space	Printing materials	Event catering	Web presence	Admin support	Content/expertise
Fed/FDIC/OCC	✓	✓	✓			
Local Governments	✓					
A&O Network				✓		✓
Anchor Institution	✓				✓	
Experts in your midst						✓

Fundraising Tips

When making a pitch to funders, there are a few things to remember. Be clear about the problem your coalition intends to solve, measure what you do, and connect the dots between your short-term achievements and the long-term goals that your coalition and the funder share.

Be clear about the problem you are trying to solve. Few funders will be interested in funding mundane coalition activities, such as holding monthly meetings, unless they can see how those meetings contribute to achieving a larger goal. A theory of change can show how your activities will lead to achieving your long-term goals.

Example: You can show how identifying and sharing best practices builds member capacity, which translates into more effective programs and to reaching scale in service delivery in your community.



Measure what you do. It is much more powerful and persuasive to funders if you can back up the broad buckets of work you propose to do with hard numbers against which they can hold you accountable. Think though which aspects of your work are “countable” and that bear a good relationship to the goals you seek to achieve.

Stakeholder Engagement	Raising Awareness	Policy Change
<input type="checkbox"/> # of coalition members	<input type="checkbox"/> # of earned media placements	<input type="checkbox"/> # of policymakers educated
<input type="checkbox"/> # of individuals reached via workshops, forums, webinars, events	<input type="checkbox"/> # of individuals reached via social media	<input type="checkbox"/> # policies/issues influenced

Example: Figure out what aspects of your activities you can count that relate to your goals.

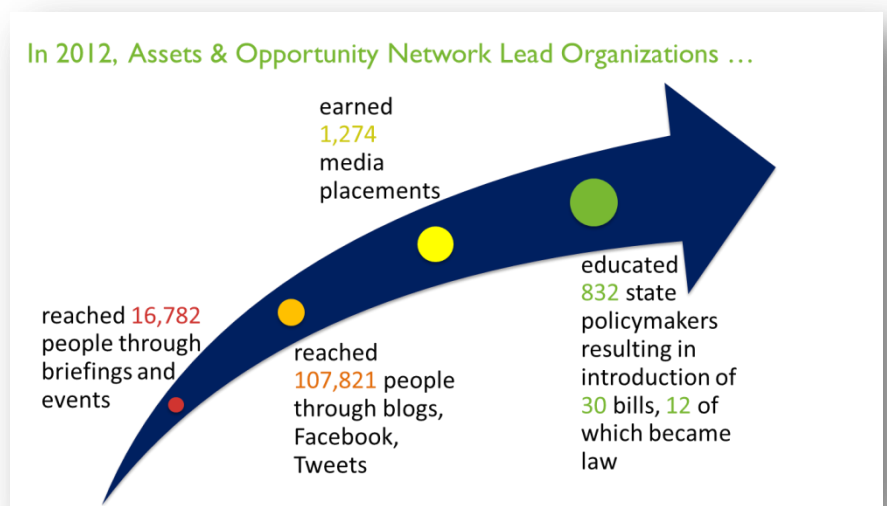
Insights from Participants on Measuring Coalition Impact

“Members must be willing to measure metrics as a group, not just as individual organizations.”

“We did a pilot project on results-based accountability to help members develop outcomes. Together they figured out which numbers to count to show a larger coalition impact.”

Connect the dots. As essential as it is to measure what you do, it is equally critical to weave your data into a compelling story that shows how your activities work together to achieve a larger impact.

Example: Annually, the A&O Network aggregates data from more than 70 Lead Organizations, in part to show how awareness-raising events, traditional and social media, and policymaker education all contribute to policy change.



Peer Advice: Experiences with Fundraising

Daniella Levine, Catalyst Miami; Woody Widrow, RAISE Texas



Daniella Levine was, at the time, President of Catalyst Miami.

Woody Widrow is Executive Director of RAISE Texas.



Daniella's Five Rules for Fundraising

1. Understand the respective roles of the funder and grantee, and honor them.
2. Be interesting and have something valuable to contribute.
3. Be authentic, honest and accountable.
4. Take a long-term view to fundraising.
5. Have a sense of humor and perspective.

Bonus rules:

6. *Fundraising is about relationships, not transactions.*
7. *Think of funders as advisors; they might come to think of you that way in the future.*

Woody's Fundraising Advice

- Recognize that funders put their reputations on the line when they recommend you for funding. Ask the funder how you can help each other.
- Ask for funding for operations, a rainy day and sustainability.
- Invite financial institutions to sit on your Board. Later ask them to fund your programs.
- Consider paid coalition membership as a way to fund lobbying activities.
- Leverage partnerships with allies as a way to contain costs and therefore reduce the amount of funding you need to raise.
- Remember to include success measures for the long-term. Projects can take 10-20 years to show results. In addition to short-term proposals, write a 10-year plan to get funders invested in your projects.

Session 5: Recruiting Coalition Members

The need to recruit diverse coalition members is clear: not only does it ensure that your coalition is responsive to community needs, it also builds power to affect systems change—whether that is the power to change policies or the processes for delivering services in your community. Session 5 explored who to recruit, how to recruit new members, what framing and messaging will demonstrate the value of participation, and when in a coalition’s lifecycle it makes sense to focus on recruitment.

Peer Advice: Recruiting Coalition Members

Kaye Schmitz, Florida Prosperity Partnership

Kaye Schmitz is President and CEO of the Florida Prosperity Partnership and Co-Facilitator of the Learning Group



Intentional Alignment

Intentional alignment is the notion that organizations and coalitions should be purposeful about all aspects of strategy development—from creating a mission, vision and purpose, to developing strategic plans and recruiting partners or members that will help accomplish your shared goals. This concept can be used as one lens for identifying who to target for recruitment efforts.

For example, the mission of RealSense Prosperity Campaign in Northeast Florida is to maximize low-income households’ income. They recognized that one strategy for income maximization is taking advantage of the Earned Income Tax Credit (EITC). That recognition drove their decision to partner with free tax prep organizations that help people claim the EITC.

The Florida Prosperity Partnership also used this approach. Given FPP’s focus on changing the myriad of policies related to family financial security, it has intentionally aligned with organizations that share advocacy goals related to one or more items on FPP’s policy agenda. Doing so strengthens our voice with policymakers.

Kaye’s Advice on Convincing Others to Join Your Coalition

- Connect on values and mission. Talking about what your coalition stands for and what you’re trying to achieve allows potential members to look beyond tactics and issues to core shared values.
- Put yourself in their shoes. Think about why a potential member would join your coalition. How would it help them meet their goals?
- Talk their language. “Asset building” might make complete sense to you, but for many, it leaves them scratching their heads.
- Clearly articulate what your coalition does and the action steps it takes toward achieving your goals. Individuals are often leery about whether participation in coalitions will end up being a waste of time. Counter that concern by demonstrating an action orientation.
- Outreach and recruiting is an ongoing job. Invite others to join your coalition in every conversation you have.

Peer Case Study: Lessons from Community Organizing for Asset-Building Coalitions

Dave Snyder, Minnesota Asset Building Coalition, hosted by Legal Services Advocacy Project

Dave Snyder is the Project Coordinator for the Minnesota Asset-Building Coalition, hosted by the Legal Services Advocacy Project.



History of the Minnesota Asset-Building Coalition

The Minnesota ABC is an emerging statewide coalition. Its initial formation was driven by a small group of leaders who were based in the Twin Cities. Once the leadership group had defined enough of the structure—its broad vision, purpose and activities—they successfully raised funding from the Northwest Area Foundation to hire a project coordinator. The leadership group hired Dave Snyder, whose background is in community organizing.

For nearly a year, Dave has been traversing the state of Minnesota. He has been engaging a wide diversity of stakeholders, including many who are often not “at the table” because they have less power than the big agencies, they are geographically remote or because, heretofore, they have not identified with the “asset building” frame.

Dave’s Community Organizing Principles for Asset-Building Coalitions

Truly effective, enduring coalitions are not built through emails. Take time to meet people in-person. Relationships are more often built through face-to-face encounters than transactional ones.

Make room for new stakeholders to shape the coalition’s agenda. Approach all your encounters with a spirit of openness to learning new things and with the expectation that what you learn may alter your own agenda.

Look beyond the usual suspects. Proactively reach out to communities of color, rural communities and Native American communities. Organizations in these communities serve or have direct relationships with the people whose lives you are attempting to change. It is never too early—or too late, if your coalition is already established—to invite leaders from these communities to help “build the table” together.

Resources are finite; use them wisely and ethically. There are limits on the attention and resources of funders, media and policymakers. Use their attention and resources in ways that respect those who often get neither.

Think carefully about systems of power and intervene to change those systems. In any campaign, do a power analysis. Ask: “who has the power to make the change we want to make?”

Bridge the gap between coalitions and community organizers through projects that have a neighborhood impact. Many community organizing groups work on local issues at the neighborhood and city level. Explore how you might partner with these groups.

“The asset-building field is aspirational, positive and not just focused on anti-poverty. It has concrete tools that will help the community, but it is necessary to think about equity among stakeholders around funding streams, particularly with regard to traditionally marginalized communities.”

Model for Bridging ABCs and Community Organizing:
AC CAN developed a [toolkit](#) that calculates how much money predatory lending takes out of the neighborhood. Seeing the impact on the neighborhood inspires residents to take action.



Participants' Experience Recruiting Coalition Members

What challenges or successes have you had recruiting coalition members?

"We were able to recruit a new member to the coalition through my primary job—community relations outreach for a local credit union. This new member went on to become the Chair of the coalition."

"Even if you don't personally know a target coalition member, approach and recruit them anyway."

Take-away: Ask each coalition member to think about all of their connections in their work outside of the coalition when thinking about recruitment.

How might you incorporate principles of community organizing into your work?

"We will use the idea of building the table together, especially when working with faith-based groups, who we have had trouble recruiting in the past."

Take-away: Invite a diversity of groups to be a part of building the coalition with you from the start.

"The point that face-to-face contact is necessary for building coalitions reinforces the importance of having regular in-person convenings."

"I suggest not only hosting your own coalition meetings, but also attending other coalition's meetings as a way to meet people."

Take-away: Don't expect potential stakeholders to necessarily show up at your meetings. Meet people where they are.

How have you demonstrated the value of your coalition?

"Our collaborative developed an 'active referral system' to document the referrals between service providers in the community, both to demonstrate impact and to make the case for further investment in the collaborative. This active referral system has resonated with members and reinforced the community-building approach."

"I change my pitch depending on who I am talking to. For example, when talking about financial literacy to employers I use the argument that when employees are financially secure, they are more focused on work and thus more productive."

Take-away: Don't expect people to understand "asset-building lingo." Describe your work in ways your audience can understand.

Session 6: Promoting Engagement and Sustaining Momentum

Anyone who has ever been part of a coalition knows how hard it is to sustain energy and engagement over time. Many of us can point to a coalition experience where, over time, enthusiasm waned, participation dwindled and a once-vibrant coalition faded away. Why do coalitions fail? It is, at least in part, because coalition leaders fail to keep sufficient focus on the coalition's vibrancy and relevance. The final session of the Learning Group series focused on promoting active coalition participation and on sustaining member engagement and coalition momentum.

Participant word association: What comes to mind when you think about promoting and sustaining engagement and momentum?



Three Key Strategies to Promote Engagement and Sustain Momentum

1. **Share leadership with coalition members.** Sharing leadership can happen in many ways. For example, you can give members the opportunity to make key decisions. You can encourage them to lead working groups or facilitate coalition meetings. Or you can intentionally rotate steering committee members off the committee to make room for emerging leaders.

At a national level, the Assets & Opportunity Network purposefully shares leadership with Lead Organizations through a representative Steering Committee; by inviting participation in standing and ad hoc working groups; and by encouraging Lead Organizations to facilitate Learning Groups like this one.

2. **Keep the coalition relevant and timely.** "Set it and forget it" is not an effective strategy when it comes to your coalition's priorities, activities and actions. Coalitions need to adapt to address emerging issues and members' interests. Members will continue to come to the table as long as they get something valuable out of participation. Coalitions are vibrant when they continue to take on the issues that feel most relevant and pressing "right now."

Regularly ask coalition members what issues they think are critical to address, as well as what's at the top of their own priority list. Online survey tools, like SurveyMonkey, are an easy way to get real-time, regular input. Coalition leaders can use that input to inform everything from meeting agendas to coalition priorities.

3. **Create opportunities and activities to engage members.** Sometimes talk is cheap and what members really want is action. Make sure that your meetings are focused on action and learning, rather than on a series of updates on who's doing what. Create opportunities and activities for learning, information-sharing or collective action by members.

Participant Insights on Promoting Engagement and Sustaining Momentum

What has your experience been keeping members engaged? What do you do to keep them engaged?

“We have a Steering Committee and a Program Committee, and each has Chairs. The coalition hosts quarterly stakeholder convenings, during which there are member spotlights. Additionally, there are learning opportunities such as trainings and webinars. We make an effort to ask members what they want after each convening and training.”

Take-away: Create opportunities to lead and learn. Ask for input regularly.

What experiences have you had sharing leadership among coalition members?

“Our coalition steering committee is small and they are attempting to expand and share leadership. At an event in March, the group hopes to conduct a strategic planning session and will invite people we hope to have on the Steering Committee.”

Take-away: Invite members into decision-making groups.

“Our group has a decent-sized steering committee and a previous event resulted in greater membership. The steering committee shares leadership and recently broke out into working groups to move the coalition forward.”

Take-away: Use smaller groups to engage more leaders and drive the work forward.

“Too many phone call-based meetings equates to fewer relationships and connections. There are some ways to connect virtually that work but often it is better to meet face to face.”

Take-away: Make sure to meet face-to-face ... at least sometimes.

“We sustain momentum with monthly newsletters and I suggest asking members to contribute articles to these newsletters.”

Take-away: Spotlight members’ work in communications in between meetings.

What is an example of how you have kept the coalition relevant to your members?

“It is important to not just focus on policy in a coalition, but programs and how they intersect.”

“At our partner meetings, we provide a space for groups to discuss how they would like to partner and build side collaborations.”

Take-away: Give ‘em what they want.

“Engage people after tax season. Pull them together to share stories about tax season and introduce a policy discussion that way.”

Take-away: Use shared service delivery experiences to engage members on needed policy change.

“We host an annual conference as a way to keep the coalition relevant. We poll members ahead of time to find out what they want to see and learn.”

Take-away: Poll members on what they want to learn.

Related Resources and Examples

Session 1. Starting an Asset Building Coalition (See also: [PowerPoint](#), [notes](#))

- [Examples of coalition names, mission statements, types of member organizations and issue areas](#)
- [Common coalition activities](#)
- [Sample theory of change](#)
- [Florida Prosperity Partnership's Goals and Strategies](#)
- [Montgomery County's Coalition for the Advancement of Financial Education's \(CAFE\)'s historical outline](#)

Session 2. Structure and Governance (See also: [PowerPoint](#), [notes](#))

- [Types of collaborative structures](#)
- [North Carolina Assets Alliance membership overview](#)
- [Operating Guidelines of the NC Assets Alliance: Delineation of Roles and Responsibilities](#)
- [Process for determining the policy agenda for the N.C. Assets Alliance](#)
- [Prosperity Partner's Membership Application](#)

Session 3. Managing and Facilitating a Coalition (See also: [PowerPoint](#), [notes](#))

- [Design Thinking for Social Innovation](#)
- [Crash Course on Human Centered Design](#)
- [Consensus Workshop Method Overview](#)
- Facilitator's Guide to Participatory Decision-Making, by Sam Kaner

Session 4. Fundraising (See also: [PowerPoint](#), [notes](#))

- [Sample theory of change](#)
- [Pathways to Prosperity: From Breaking Even to Getting Ahead](#)

Session 5. Recruiting Coalition Members (See also: [PowerPoint](#), [notes](#))

- [Prosperity Partner's Membership Application](#)

Session 6. Promoting Engagement/Sustaining Momentum (See also: [PowerPoint](#), [notes](#))

- [Operating Guidelines of the NC Assets Alliance: Delineation of Roles and Responsibilities](#)

Network Learning Group on Coalition Building

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Facilitators

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AC CAN in California, and Kaye Schmitz, President and CEO of the Florida Prosperity Partnership. Lisa and Kaye are also each members of the Assets & Opportunity Network's Steering Committee.



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About this Publication

This *Lessons and Insights* brief was written by CFED’s Jennifer Brooks, Fran Rosebush and Dara Duratinsky. It summarizes and draws out highlights from each of the six Learning Group sessions, which were held between September 2013 and February 2014. This Learning Group was co-developed by CFED and the Co-Facilitators and managed CFED. The authors thank each of the peer and outside experts – Amy Williamson, Ashley James, Cynthia Zwick, Pamela Chan, Daniella Levine, Woody Widrow and Dave Snyder for sharing their experiences and wisdom. The authors are also indebted to Learning Group Co-Facilitators Kaye Schmitz and Lisa Forti for their leadership, expertise and commitment to realizing the promise of the Assets & Opportunity Network.

About the Network



The Assets & Opportunity Network is a movement-oriented group of advocates, service providers, researchers, financial institutions and policymakers who implement strategies and advocate for policies that help people become more financially secure. It is a learning community that can speed up diffusion of innovative ideas and an advocacy community that increases participation in the policy process and, ultimately, our collective impact. Launched in 2012, the Network leverages the combined experience, power and potential of the assets field. It is staffed by CFED, guided by a nationally-representative Network Steering Committee and convened locally by 73 Lead State and Local Organizations, many of which host statewide or local asset coalitions.