M+R

To Be
(A Coalition)
Or Not To Be
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TOM NOVICK
AND
MICHAEL O'LOUGHLIN,
M+R STRATEGIC SERVICES

To Be (A Coalition) Or Not To Be (A Coalition)

Like bungee jumping, eating hot peppers or starting a rock band, forming a coalition usually starts with one question: Should we really do it?

Coalitions offer the potential to build advocacy campaigns that are more powerful and effective. When managed well, coalitions allow advocates to coordinate and share resources for the benefit of all involved. By joining forces with usual or surprising allies to advance a common goal, a coalition can help you exceed the capacity and impact of what your organization could achieve alone. Say your group has legal expertise, another group has legislative connections, another group has clout with the press, and yet another has a base of engaged advocates… imagine what you could accomplish if you put those resources together!

The power of a coalition's unified message must also not be understated. When groups come together around a message or goal, decision-makers understand that there's something bigger at play than each group's self-interest. That gets attention and gives you group power. But we have to admit, coalition life is not all chest bumps and high-fives. Coalitions present some potential downsides. Group decision-making and coordination can be difficult. Organizing your friends (and sometimes your frenemies) to align their interests with yours isn't easy. Groups may face a brand sacrifice: Who gets the credit? What's more, who gets the spoils?

Through our work helping dozens of funders and nonprofits assess, build and manage coalitions on public health, the environment, human rights, transportation, and other issues, we've encountered a lot of the same questions and considerations. We know you want to advance your issue and

win, but at the end of day, you also have an organization to maintain and a mission to adhere to. Coalitions work best when they serve dual goals: the self interests of member organizations (What's in it for me?), and the combined interests of the whole (What's in it for us?).

The following white paper outlines some steps we recommend for getting your coalition off to a good start and avoiding common pitfalls.

	Letterhead	Issue-Based Alliance (informal and formal)	Formal Coalition
Sign-on letters	X		X
Share a press conference	X		X
Share information & strategy		X	
Coordinate messaging		X	
Share resources & funding			X
Share branding and show unity			X

Coalitions 101

Before we get started, what do we mean by "coalition"? We typically see three types of public interest coalitions – all of which are valid, but vary in terms of commitment:

1. **Letterhead** – The loosest commitment, where member groups agree to put their name on something – such as a sign-on letter, a shared policy goal, or participation in a news conference – but where groups are not necessarily coordinating strategy or sharing resources.

2. **Issue-Based Alliance** (informal and formal) – Where member groups agree to work together: sharing information and strategy, staying in touch, coordinating messaging, and so on. Groups may elect to maintain some degree of informality or flexibility; for example, member groups may not represent themselves as a formal coalition or a united entity at press conferences or meetings with decision-makers.

3. **Formal Coalition** – Where member groups form a new "organization of organizations," agreeing to work together, share information and strategy, share resources and funding, and

at least to some degree to share branding. Some groups may position themselves as closer to or further away from the core coalition, but all groups own a stake in the operations and the outcomes.

Whatever the format, coalitions are nearly always about building power. Once you've chosen which type of coalition is best for you and your cause, consider taking these steps.

Set Ground Rules

It's a brain-twister, but before you can make decisions together, you have to decide how decisions will be made. This is especially true if there's a resource imbalance (some groups are contributing greater resources than others). New coalitions should set clear terms for member groups at all participation levels.

To navigate this terrain with more ease, we recommend you begin building your coalition before your campaign reaches peak intensity. Give time for coalition partners to forge relationships and trust, celebrate the early victories and build the camaraderie and confidence to take on the big fights.

For example, when the goal of enacting meaningful health care reform appeared within reach in 2010, a group of heavy-weight nonprofits united forces to ensure the moment wasn't lost. Health Care for America Now (HCAN) was formed with one priority: to win affordable and comprehensive health care for all Americans. They succeeded, and M+R, working with a coevaluator, was asked to assess the coalition's effectiveness for funders (in a public report that you can read here).

The cornerstone of the HCAN coalition, and the single factor most consistently cited to explain its durability and ongoing cohesion, was the set of principles developed in 2008 — well before there was even a health care bill to debate. Many coalitions attempt to articulate core principles; what makes HCAN's Statement of Common Purpose significant is that it was actively used in the formation and management of the entire coalition campaign. At the outset, these principles played a valuable role in attracting members and shaping the roles they played in the coalition. It allowed HCAN to bring together groups and organizations that did not necessarily trust each other and that may have had disagreements in the past, but could recognize mutual beliefs embodied in the principles and could commit to coordinated actions grounded in those principles.

Set Goals

Among your coalition's member groups there are likely dozens of viable – and admirable – goals. We know you want to change the world. But with limited time and resources, you can't fix everything all at once.

In order to be effective, your coalition must define a limited set of specific, achievable goals. What are your shared priorities? What can you accomplish together?

We recommend you work with your initial coalition partners to create a clear set of coalition goals, for four distinct reasons:

1. To attract additional partners;
2. To clarify who should not join your coalition;
3. To focus the work and avoid mission creep; and
4. To define your end game…so you know when it's over!

It's okay if there are good ideas on the cutting room floor when you're done with the process of elimination. While you're achieving your current shared goals, you can also be building capacity for the future: cultivating new relationships, gaining new skills, expanding your organization's reach or brand, and so on.

Appoint a Manager

You and your coalition partners should develop ground rules and principles for how your coalition will function—in good times, and in bad. Ideally, these principles will drive and guide decision-making through the life of your coalition. During moments of struggle, disagreement or low morale, these principles can be the only thing that keeps your coalition on track.

What's more, a highly functioning coalition usually has a campaign manager at the center who is not also working for one of the vested organizations. This independent individual should be focused on implementing your shared plan, not just coordinating the activities of member groups. It's an important distinction: A coalition manager is less a cruise ship tour guide ("Shuffleboard on Deck 6!") than the coxswain of an Olympic rowing shell (someone who steers the boat, makes the tactical decisions, coordinates the rhythm and power of crew members to maintain balance and move the boat with maximum speed, provides motivation and discipline… and then traditionally gets thrown overboard after winning a regatta!).

A coalition manager should keep member groups focused on their shared interests, instead of only their institutional self-interests, smoothing out decision-making and ensuring your coalition is adhering to agreements and plans. On the other hand, it's also important to recognize that groups do have institutional interests, and having a manager to help partners achieve their own interests can be an added value for participating groups – as long as those interests do not conflict or compete with the mission of the coalition.

ETIQUETTE FOR THE UP-&-RUNNING COALITION

1. Participate in a coalition only if it will help you build power and influence for your campaign(s).
2. Choose a unifying principle/mission.
3. Agree to disagree… then focus on issues where you do agree.
4. Recognize that contributions vary, and value that.
5. Establish clear and transparent channels for group communication.
6. Structure decision-making carefully.
7. Track progress carefully and report on a frequent and regular basis.
8. Plan! Make sure you have realistic strategies and clearly defined tactics.
9. Help organizations achieve their self-interests.
10. Distribute credit fairly.

Pledge Assets

Your coalition should clearly define expectations for how, and how often, available resources will be tapped. What are all the assets to be mindful of as you get started? Email lists, social media followers, reporter contacts, expert or celebrity spokespeople, grassroots advocates, and basic budgets are all prized resources in coalitions.

The most successful coalitions address assets from the start by creating a clear work plan. An agreed upon timeline and set of defined activities can go a long way in ensuring your coalition member groups are clear on their marching orders and will deliver on those commitments when the time comes. For example, one of the biggest assets a group can contribute to a coalition is their constituent base (e.g., their email list)—which is often more valuable than cold, hard cash! Contributing your constituents to a coalition's efforts is not necessarily typical, and we know it can be a little bit scary. But no group needs to give up control of its members.

Your coalition should plan ahead and be specific about how that resource will be used, and when. Help your member groups plan by being clear about when it will be important to have them use their online base to benefit the campaign.

At the outset of your coalition work, you should also address what will come of any new assets created by your campaign. How will new volunteers, new email list members, and other acquired resources be dealt with? All too often we've seen these resources go to waste when a campaign or coalition effort ends because members groups haven't agreed beforehand to what will become of them.

(We'll be writing more about the assets – and in particular, the tricky terrain around list-sharing and list-building within a coalition – in an upcoming post on M+R Research Labs, so stay tuned!)
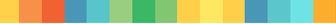
What Did You Decide?

We hope these tips get you asking the right questions as you consider whether a coalition and what kind of coalition could be right for yourorganization or your issue.

It's a lot to consider, but at the end of the day, we're big fans of teamwork. When organizations come together around a common cause, significant new power can result. Learn from your partners, value your colleagues and (at the risk of sounding earnest), have fun!

Making friends is not the reason to work in a coalition – it's building power to win change, remember? – but it sure helps along the way.

About M+R

M+R is dedicated to helping our clients advance their missions in order to bring about positive change. We do this by helping organizations and campaigns we believe in develop smart and effective strategies, hone their messages, mobilize their members, build grassroots support, raise money, and communicate effectively with the media, the public and decisionmakers, both online and offline.

If you'd like more guidance and support from M+R about how to design and manage coalitions, please contact Tom Novick at tnovick@mrss.com and visit www.mrss.com to learn more about us.