

## **The Eight Steps to Developing an Effective Coalition\***

### **Step 1 Analyze The Program's Objectives and Determine Whether To Form A Coalition**

Is a coalition the appropriate tool to serve the initiative's need? The answer to this question can be determined by following the steps:

- Clarify the objectives and appropriate activities
- Assess community strengths and weaknesses
- Determine the costs and benefits to the lead agency

### **Step 2 Recruit The Right People**

There are six considerations when recruiting people for your coalition:

- Membership type; determine the membership type based on the coalition's goals. Most coalitions should have diverse membership.
- Member organizations; start by identifying organizations that already work on the identified issue and look broadly for other organizations that should be involved.
- Individual members; many coalitions welcome individuals in their membership. It is a good idea to include individuals who are not affiliated with an organization because they can perform functions that other coalition members may not easily be able to perform.
- Competitors and adversaries; decide whether to include or exclude based on the sincerity of their commitment to the coalition's goals.
- Organization representatives; consider who will best represent each organization on the coalition. Often participation from both top leadership and line staff is essential to achieving coalition goals
- Membership size; aim for a membership size just large enough to achieve goal. Groups larger than 12-18 people require more resources and sometimes that longer to develop.

### **Step 3 Devise A Set of Preliminary Objectives And Activities For The Coalition**

Issues that will need to be addressed include:

- Melding the objectives of the member groups; until trust is established, avoid turf issues between coalition member agencies.
- Coalition goals and objectives; while dealing with long-term objectives set some objectives that can be addressed by all member organizations more immediately.
- Coalition activities; well-chosen activities will be well-defined, meet the needs of participating organizations, make use of the skills of coalition representatives and provide the opportunity to experience success.

### **Step 4 Convene The Coalition**

In order to hold a successful coalition meeting the lead agency should:

- Clearly define the purpose of the coalition and members should specify their expectations.
- Arrive at the first meeting with a strong proposal for the coalition's structure, including its mission and membership.
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## **Step 5 Anticipate The Necessary Resources**

Effective coalitions generally require minimal financial outlay for materials and supplies, but require substantial time commitments from people. The lead agency generally provides the majority of staff time. The lead agency should expect extensive staff time demands in the following seven areas:

- Clerical
- Meetings
- Membership
- Research and Fact Gathering
- Public Relations and Public Information
- Coordination of Activities
- Fundraising

When calculation the needed resources, estimate the number of hours per month required for each of these categories, and then multiply this total by two.

There are five possible sources for supplementing coalition resources, whether in the form of cash or donated services. They are:

- Media
- Foundations
- Local Service Clubs
- Students and Trainees
- Volunteers

## **Step 6 Define Elements Of A Successful Coalition Structure**

- Coalition life expectancy; the coalition's goals should dictate its longevity.
- Meeting location, frequency, and length; poll members to see which times and locations present the least conflict in terms of both personal and work commitments.
- Membership parameters; how defined or open should the membership be?
- Decision making methods; establish a specific decision making process. Decisions can be made by consensus. Define consensus as an approach that the majority supports and others can live with.
- Meeting structure; have a clear, consistent agenda.
- Participation between meetings; successful coalitions generally have active planning groups or subcommittees, formal and informal, which carry out coalition activities. Don't forget good food!

## **Step 7 Maintain Coalition Vitality**

- Addressing coalition difficulties; the most common difficulties include:
  - Poor group dynamics
  - Membership/participation concerns such as a difficult agency or member
  - Coalition emphasis on too many long-term goals
  - Ineffectiveness in achieving coalition activities
  - Changes affecting the coalition's mission

Maintaining open communication means not just talking to the people who do come to the meetings – but the people who stopped.

- Sharing the power and leadership
- Recruiting and involving new members

- Promoting renewal by providing training and by bringing challenging, exciting new issues to the group
- Celebrating and sharing successes

### **Step 8      Make Improvements Through Evaluation**

Coalitions can employ two basic types of evaluation, formative and summative evaluations. Formative evaluations focus specifically on the coalition's process objectives. Summative evaluations help coalition members to determine whether or not the coalition's strategies resulted in the desired consequences. (see evaluation section of toolkit for more information).

\*Adapted from Developing Effective Coalitions: An Eight Step Guide; Prevention Institute;HTML:  
<http://www.preventioninstitute.org/eightstep.html> ; PDF:  
<http://www.preventioninstitute.org/pdf/eightstep.pdf>