



Coalition Building for Tolerance and Non-Discrimination

A Practical Guide

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This guide is intended for use by civil society organizations to strengthen their co-operation and spread the practice of coalition building throughout the participating States of the Organization for Security and Co-operation in Europe (OSCE). It represents a joint effort by the OSCE Office for Democratic Institutions and Human Rights (ODIHR) and civil society organizations active in the field of coalition building, and ODIHR would like to express gratitude to the following individual experts and their organizations, whose contributions were instrumental in the development of this guide:

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Foreword

This publication offers civil society organizations in the OSCE region a practical basis for building successful coalitions aimed at addressing discrimination and building more peaceful and tolerant societies. By providing multiple resources and good practices, this guide serves as a starting point not only for civil society organizations and communities setting out to create successful coalitions that strengthen anti-discrimination laws and norms, but for all civil society members wishing to establish coalitions to advance their goals.

The high-level commemorative conference on addressing anti-Semitism organized by the OSCE in November 2014, as well as previous civil society events organized on the margins of OSCE human dimension events, highlighted the need for broad, inclusive and diverse civil society coalitions that support governments in their efforts to prevent and address hate crime and discrimination. OSCE commitments also underscore the importance of participating States' support in developing and constructively engaging with civil society to end intolerance and discrimination. Indeed, in several OSCE Ministerial Council decisions and declarations, participating States have committed themselves to develop a comprehensive approach to preventing and responding to hate crime and discrimination, in particular through support for civil society.¹

This guide is the result of a series of workshops organized within the framework of the Words into Action Project, developed by ODIHR to support participating States' implementation of the above commitments, with funding provided by the German Ministry of Foreign Affairs. Among other objectives, the Words into Action Project aims to foster coalition-building and inter-community dialogue, with a view to strengthening joint civil society advocacy to improve responses to anti-Semitism and other forms of intolerance and discrimination.

ODIHR encourages civil society organizations in the OSCE region to use this manual as a source of inspiration and as a tool for building or improving coalitions that are based on a shared vision of ending all forms of intolerance and discrimination.

Ingibjörg Sólrún Gísladóttir
ODIHR Director

¹ See: OSCE Ministerial Council Decision No. 13, "Combating Intolerance and Discrimination and Promoting Mutual Respect and Understanding", 5 December 2006, <https://www.osce.org/mc/23114>; OSCE Ministerial Council Decision No. 10, "Tolerance and Non-Discrimination: Promoting Mutual Respect and Understanding", 30 November 2007, <https://www.osce.org/mc/29452>; OSCE Ministerial Council Decision No. 9, "Combating Hate Crimes", 2 December 2009, <https://www.osce.org/cio/40695>; OSCE Ministerial Council Decision No. 3, "Freedom of Thought, Conscience, Religion or Belief", 6 December 2013, <https://www.osce.org/mc/109339>; and OSCE Ministerial Council Decision No. 8, "Enhancing Efforts to Combat Anti-Semitism", Basel, 5 December 2014, <https://www.osce.org/cio/130556>.

Introduction

Coalition Building for Tolerance and Non-Discrimination: A Practical Guide contains easy-to-follow advice and real-world examples to support individuals and organizations seeking to build and maintain coalitions aimed at addressing intolerance and discrimination. In addition to providing step-by-step instructions on creating a coalition, this guide explores the core values of coalitions working to promote non-discrimination and looks at how these values shape the coalition – from its composition and structure to its leadership and decision-making practices.

The guide offers practical tools that are suitable both for those who have never been part of a coalition, as well as for those with significant experience of working in coalitions. Whether the coalition is just a nascent idea or has been in operation for some time, this guide provides concepts and practices that will help to increase coalitions' strength and effectiveness. In addition, examples provided by coalition builders at the local, national, regional or international levels offer lessons learned from practical experience.

Chapter 1: Overview of Coalition Building introduces the coalition as a structure for collaborative endeavours and describes some of the traits shared by the most successful coalitions. It reviews the reasons to form a coalition and provides examples of some of the activities that these coalitions undertake.

Chapter 2: Building a Coalition addresses the steps that should be taken prior to launching a coalition, beginning with an assessment of whether or not the right conditions are in place. The primary focus of the chapter is on identifying who should be involved in the process, developing strategies to recruit them and determining what to do if they decline to join.

Chapter 3: The Coalition Start-Up Meeting describes the steps to plan a first meeting that sets the right tone for the coalition and leaves people feeling energized, focused and ready to work together.

Chapter 4: Coalition Structure, Governance and Leadership provides an overview of the operational and structural decisions that coalitions need to make, and considers how those choices shape the values of the coalition as a whole.

Chapter 5: Developing a Coalition Plan provides an outline for a coalition planning meeting, discusses the elements of a plan and offers an alternative process for planning.

Chapter 6: Sustainability discusses steps that can be taken from the earliest stages to help sustain the coalition, its programmes and its benefits for the community. It provides strategies for dealing with conflict, retaining members and developing leadership, and outlines a process to plan for sustainability. Finally, the chapter describes various approaches that coalitions can take to ensure the lasting impact of their work.

In **Chapter 7: Tracking and Evaluation**, the guide offers a variety of processes and methods to track the coalition's progress and evaluate its impact.

Appendix 1 provides links to relevant websites for further information, and **Appendix 2** contains additional materials on coalition building, including both expert guidance and practical tools. These tools have been formatted so that they can be easily copied for use within coalitions. Finally, a **Glossary** of key terms can be found at the end of the guide.

This guide contains three key messages:

- 1) Coalitions can make a difference in creating more tolerant and just societies.
- 2) Coalitions should be models for the world they seek to create. This means that they should be actively inclusive, non-discriminatory and collaborative.
- 3) A coalition is a web of relationships. It is important that those creating a coalition get to know coalition members as people and understand their histories and struggles. This will not only strengthen the coalition's work, but will give it more meaning. It will also increase members' sense of shared commitment to each other and to the changes they are jointly creating.

It is recommended that users of this guide read through the entire publication to see how the different sections relate to and build on each other. Specific sections and tools can then be reviewed as relevant for the coalition in question. When a new issue or challenge is encountered, readers are advised to look at the websites listed in **Appendix 1** for additional guidance. These resources can also be adapted to better fit the needs and purpose of the coalition.

This guide compiles advice and best practices based on the experiences of multiple coalitions over time. However, it is impossible for any single guide to perfectly address the needs of every coalition coming together to address discrimination. Every coalition has unique strengths and challenges and operates within a distinct landscape. That is why this guide is intended as a starting point for discussions, and not as a rule-book. Above all, there must be clear agreement within the coalition on the values that it represents, and each approach to realizing the coalition's aims in support of those values must be discussed. These discussions will help to make the coalition as inclusive, collaborative and effective as possible.

Chapter 1

Overview of Coalition Building

This chapter provides an introduction to coalitions for those unfamiliar with the coalition model, and describes some of the reasons why groups have found it beneficial to form coalitions.

About coalitions

Across the OSCE region, the word “coalition” is frequently used to refer to political parties working to secure a legislative majority.² For the purposes of this guide, however, the term refers to a group of individuals, civil society organizations, communities, religious institutions, businesses, journalists and/or government agencies that agree to work together towards a common goal. That work may be extremely narrow in scope and time-limited, or it may be quite broad and ongoing.

Examples

In 2004, the Moscow Helsinki Group and the Union of Councils for Jews in the Former Soviet Union (UCSJ) launched an ongoing coalition through a formal memorandum of understanding. The resulting Coalition Against Hate had the broad goal of countering anti-Semitism, nationalist hatred, religious intolerance and xenophobia. Coalition organizers report that, at the time of its formation, it was the only existing platform of co-operating non-governmental organizations (NGOs) and activists, primarily from Russia, Kazakhstan, Ukraine, Belarus and the United States, formed specifically to discuss the problems of xenophobia and religious intolerance.

Also in 2004, five Bulgarian-based NGOs with expertise in social and human rights policy formed an informal, temporary coalition to draft an “Alternative regular report on Bulgaria’s progress towards European Union accession”. After the report was drafted and presented to the relevant institutions, the coalition disbanded. Some of the organizations have since been involved in other joint activities. (Example courtesy of the European Network on Independent Living).

The word **coalition** refers to a group formed when multiple entities agree to work together towards a common goal. A coalition is a form of collaboration or partnership for a specific purpose. It differs from the common understanding of the term “partnership” in that coalitions involve more than two partners. It also differs from a dialogue – an activity adopted by many coalitions for tolerance, but which does not constitute a coalition except as part of a broader strategy in which participants work together towards a shared goal.

Coalitions can operate at the local, national, regional or international levels. The geographic focus of a coalition may shift over time as policy developments at one level threaten goals at another level, or as the coalition sees opportunities to replicate a successful model. For example, Phiren Amenca (a network of Roma and non-Roma voluntary service organizations that promotes dialogue and engagement to challenge

² See, for example, the Oxford English Dictionary definition of a coalition as “a temporary alliance for combined action, especially of political parties forming a government.”

stereotypes, racism and intolerance and discrimination against Roma began by placing young adult volunteers in projects with Roma minorities in the Transcarpathian region of Ukraine. In the years that followed, new partner organizations joined and the programme expanded across the OSCE region. Efforts are co-ordinated through a resource centre based in Budapest, and network members come together annually to share experiences and practices and to identify priorities for their work.

Resource: The Community Tool Box is a free, online resource hosted by the University of Kansas (United States) that offers thousands of pages of tips and tools for taking action in communities. Chapter 5, sections 5 and 6, of the Tool Box, dedicated to starting and maintaining a coalition, will be referenced throughout this guide. For more information, see: www.ctb.ku.edu/en/table-of-contents/assessment/promotion-strategies/start-a-coalition/main.

Coalition goals vary widely, but often involve one or more of the following:

- *Influencing or developing public policy around a specific issue.*
- *Changing people's behaviour.*
- *Building a secure community.* This term generally refers both to the community's physical security and its social and psychological security and, as such, encompasses violence prevention, diversity, education and youth development, among other areas.

There are many reasons why organizations and individuals choose to form coalitions. The most common is that they can accomplish more together than they could alone. The more complex the problem, the more resources, experience, skills and connections it will take to address it. By bringing together partners with a variety of perspectives, coalitions can develop and implement powerful, innovative and inclusive strategies that can lead to significant change.

The most effective and successful coalitions share several traits in common:

- **A clear vision and mission:** Having an explicit vision that is created and shared by the whole coalition is critical to success.
- **Action planning:** If the coalition is to enact changes, it must draw up and implement action plans to realize its vision.
- **Developing and supporting leadership:** Successful coalitions understand that different voices can foster trust and legitimacy among different beneficiaries. They work to identify leaders across all coalition partners, continually develop leadership within the coalition and recognize that sharing leadership strengthens the coalition's ability to achieve its goals.
- **Documentation and ongoing feedback:** The coalition must track its activities and outcomes and provide regular feedback to all coalition members.

- **Technical assistance and support:** The most successful coalitions recognize when they need help and seek advice from consultants, outside facilitators and peers conducting similar work.
- **Securing resources:** Coalitions require some resources to be successful. This may include hiring dedicated staff or acquiring funds to organize events, or having the means to print materials and maintain a website. These resources may be secured through fundraising or by collecting in-kind contributions from coalition partners.
- **Making outcomes matter:** In successful coalitions, results matter most. It is critical to never lose sight of how the coalition's work will lead to changes in line with its vision.

This guide will provide practical advice and tools on how best to ensure these traits and to create a coalition that is set up for success. It will also address common reasons why coalitions fail and will provide tips for avoiding those pitfalls.

Why create coalitions to address discrimination?

At its most basic, coalition building is about doing together that which cannot be done alone. The problems of intolerance and discrimination are deeply embedded across the OSCE region. Addressing these problems requires the efforts of many parties and cannot be accomplished in any large measure by just one group acting on its own. This is the importance of building coalitions.

Unlearning prejudices that have developed over centuries requires changes at all levels – within individuals, families, institutions, communities and, ultimately, societies. Coalitions may choose to approach the problem on one or more of these levels. Regardless of the approach, a productive and respectful partnership must be formed with the people who are most directly affected by the issue: those who are the targets of prejudice, discrimination and intolerance.

There are many different paths to generating these changes. Some coalitions start with dialogue to build understanding, and then move to taking collective action to pursue collaborative solutions, such as changes in programmes, practices and policies. Some coalitions begin by working to bring about a change in policy and only later identify partners to strengthen and amplify this work. Regardless of the method, coalitions ultimately promote community and institutional change.

From a practical standpoint, coalitions approach the problem of discrimination through a variety of strategies. They may be active in one or more of the following ways:

- Co-ordinating the activities of multiple organizations working towards a common goal.

Example: The Coalition against Hate is an alliance of non-governmental groups that combat xenophobia, anti-Semitism, nationalist and religious intolerance,

bias-motivated violence and discrimination. The Coalition was started by the Union of Councils of Jews in the Former Soviet Union (UCSJ) and the Moscow Helsinki Group (MHG). Many other civil society organizations, primarily from the countries of the former Soviet Union, then joined the coalition in order to better co-ordinate their mutual efforts.

- Educating the public – in schools, at community events or with communications strategies that engage online and traditional media.

Example: The Terraforming Network (based in Serbia, Sweden and the Netherlands) works to promote human rights, tolerance and diversity through education about the Holocaust, anti-Semitism and anti-Gypsyism, and through media literacy. The network has developed teaching materials and methodologies to empower educators, librarians, archivists and others to take an active role as educational multipliers and effectively promote and share information that leads to changes in attitudes and behaviour.

- Advocating for state and local governments to take more concrete action to address discrimination, and holding government authorities accountable for doing so.

Example: Every two years, people with disabilities from across Europe participate in a “Freedom Drive” organized by the European Network on Independent Living. Over the course of the last decade, the Freedom Drive has gone from an informal meeting to a formal event with hundreds of participants. Participants meet with their national representatives from the European Parliament, as well as decision makers in the European Commission, to present ENIL’s key demands on independent living for people with disabilities. By doing so, they aim to encourage the European Union to promote and develop new policies and strategies.

- Working to pass laws or policies that deal with hate crimes or discrimination.

Example: For more than 12 years, the Anti-Defamation League, the Human Rights Campaign and the Leadership Conference on Civil and Human Rights (an umbrella organization for civil and human rights and labour groups) in the United States led a broad coalition of civil rights, religious, educational, professional and civic organizations, including every major law enforcement organization, in advocating for the Matthew Shepard and James Byrd, Jr., Hate Crimes Prevention Act (HCPA). The legislation – the most important hate crime enforcement law in the United States in 40 years – could have been passed much sooner if the coalition had agreed to exclude protections for certain groups, such as the LGBT community. Instead, they held together to insist on the passage of a more comprehensive bill that left no one behind.

- Engaging in strategic communications that help re-shape public opinion about tolerance, non-discrimination and targeted groups.

Example: The European Forum of Muslim Women has worked with the Media Diversity Institute and several other European civil society organisations on the “Get

the Trolls Out!” project to encourage young people to combat discrimination and religious intolerance on social media. The current phase of the project includes monitoring and responding to diverse forms of hate speech, including anti-Muslim and anti-Christian sentiments and language attempting to turn public opinion against migrants and asylum-seekers.

Example: When a 20-year-old woman died following severe beatings, Armenia’s Coalition to Stop Violence against Women was formed to demand the investigation and prevention of similar instances. The coalition works to change public opinion and raise awareness among women of their rights through public events such as press conferences, television programmes, reports, articles, marches, outdoor screenings and concerts.

- Partnering with law enforcement to implement best practices in protecting vulnerable communities and in accurately tracking and reporting hate crimes.

Example: In Greece, the Racist Violence Recording Network is made up of 42 civil society groups, with the Greek Ombudsperson and the Migrants’ Integration Council of the Municipality of Athens as observers. The network was formed to help fill gaps in the official data collection system and to address the need to better co-ordinate civil society’s efforts in recording hate crimes. The coalition publishes an annual report on hate crime incidents in Greece.

- Facilitate community healing in the aftermath of a hate crime, such as by bringing people together for a candlelight vigil, a march or a forum that allows community members to express their concern and demonstrate that the community values and cares for the population targeted by the act.

Example: In June 2017, after a van was driven into pedestrians outside the Finsbury Park Mosque in London, the Stand Up to Racism network worked with the mosque to organize an interfaith vigil that was attended by hundreds of people, including prominent local politicians.

- Mobilize communities to take co-ordinated action.

Example: The European Network Against Racism (ENAR) hosts a webzine that features tools on organizing to combat racism and examples of ways that groups from around the world have come together to achieve political change.

- Provide direct support for under-served constituencies.

Example: A large group of the most active members of the interfaith coalition *Kontaktkreis Fluechtlinge* (Contact Circle Refugees) in Unkel, Germany, formed a non-profit organization called *Gemeinsam fuer Vielfalt* (Together for Diversity). The organization provides integration workshops for recently arrived refugees and operates a community centre that brings together long-standing residents and new arrivals to build understanding, increase economic opportunities and address prejudice.

Chapter 2

Building a Coalition

This chapter addresses the steps that should be taken before creating a coalition.

Although this guide encourages the formation of coalitions primarily to address discrimination, it is important to first decide whether or not a coalition is the right vehicle to achieve a particular goal. It may be that potential coalition partners must first build and improve their relationships before they can begin working together. In some cases, the goal may be more effectively achieved by a single organization or through a more loosely structured collaboration in which multiple organizations work independently towards a shared objective.

Once the need for a coalition has been established, it is then necessary to identify *who* should be a part of the coalition and *how* to recruit them. While outreach and recruitment will continue to form part of the coalition's work, involving the right people during the initial planning stage will be critical to establishing its legitimacy and building a culture of respect, inclusion and collaboration.

Assessing whether or not to build a coalition

The early stages are critical to establishing a respectful and sustainable coalition that enables participants to succeed. Trying to force a coalition into place when the conditions are not right not only wastes resources, but may actually worsen the situation that the coalition seeks to improve.

The University of Kansas' Community Tool Box identifies these questions to help determine whether a coalition can be formed at this time:

- *Is the issue or problem clear enough that everyone can agree on what it is?* The issue needs to be clearly defined, even if the solution is not.
- *Is there at least some level of trust among potential coalition partners?* Community history, or the history of particular organizations, may present seemingly insurmountable barriers to the formation of a coalition. Community divisions along racial, ethnic, social, religious or political lines; old feuds; competition among organizations; or past failed coalition efforts: Such issues may mean that a great deal of groundwork has to be done before the community or organization is willing to consider the possibility of a coalition. It may take a long time to build trust, but it is important that this is done prior to forming the coalition.
- *Is a coalition in fact the best response to the issue?* While potentially powerful, coalitions are not always the best way to address a problem. For a coalition to start out with a solid chance of success, these questions should be answered in the affirmative:
 - ▶ Can the issue be better addressed if all concerned parties are working together, and will a coalition help to accomplish that purpose?
 - ▶ Will a coalition increase the likelihood that all the factors relating to the issue are identified and attended to?

- ▶ Will a coalition increase the coherence, strength and effectiveness of the organization or the community's response to the issue?
- ▶ If this particular issue is already being addressed by a number of coalitions, is creating yet another the best response to this issue?

There are often barriers to creating a coalition. It is important to be aware of these challenges and to ensure that the process of starting the coalition is designed to address them from the outset. Subsequent sections of this guide present recommendations on how to do so. Among the most common challenges are:

- **Competition among organizations.** Organizations are often very sensitive about sharing their work, their target populations and especially their funding. They may see themselves as “owning” a particular area of work and may view an emerging coalition with suspicion. Part of the work of starting a coalition may be to convince a number of organizations that working together will benefit all of them and better address their common issues.
- **Negative 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 begin working.
- **Domination by professionals or another elite.** In their rush to solve problems or to provide assistance, experts, politicians and business leaders often neglect to involve the people most affected by the issue at hand and other community members. This can be equally true of civil society organizations with years of experience. They may expect the group to follow their lead and may take up more than a fair share of time expressing themselves at meetings. Creating a participatory atmosphere and reining in those who believe they have all the answers is almost always part of starting a coalition.
- **Minimal organizational capacity.** While coalitions have the benefit of helping member organizations accomplish more than they could alone, they do require more time to organize and keep on track than a single organization working alone. This issue can be addressed by appointing a co-ordinator, or by sharing the work of a co-ordinator among one or more individuals or organizations within the coalition. This is necessary if the coalition is to develop beyond its first meeting.

Example: In 2017, Connecting Actions convened a symposium in Paris to launch an international coalition with a focus on interfaith dialogue and tolerance. In a pre-meeting survey, participants identified potential challenges and obstacles, including funding, time, geographical distance, mutual trust, deciding who to include in the dialogue, the level of religiosity and the secular/religious divide, and differing approaches to controversial topics. Respondents identified the following conditions to help overcome these obstacles: (1) ensure that the coalition is representative of the community and that even the smallest organizations are present; (2) provide funding

for organizations to participate; (3) allow sufficient time for meetings and promote trust between participants; (4) develop concrete activities in order to justify the investment; and (5) display a willingness to communicate with anybody and a refusal to get caught up in ideology.

The above list is not intended to discourage against building a coalition under challenging circumstances. Rather, understanding the potential barriers to forming a coalition provides an opportunity to plan for how to address them and to increase the coalition's chances of success.

Beyond addressing potential barriers, coalitions tend to work best when:

- **The affected communities are not only represented but are leading the coalition.**
- **Participating organizations are inclusive and embrace diversity and gender equality.**
- **The group shares a clearly defined purpose and goals.** Coalitions that form around a broad concept, such as “anti-discrimination”, may find themselves adrift unless they sharpen their focus, clearly define how they interpret such a concept and identify exactly how they hope to work together for this purpose.
- **There is plenty of work to go around and everyone is willing to share it.** Coalitions usually form to address a complex concern; ideally, each participant brings her or his own unique strengths and resources to the effort.
- **Everyone is willing to share the credit for the coalition's successes.** Coalitions frequently fall apart when one partner claims a joint victory as their own. It is important to recognize that sharing the credit highlights the coalition's strengths and sets it up for future successes.
- **All (or most) of the key stakeholders are willing to help achieve the coalition's goals.** The more support the coalition can mobilize, the easier it is for it to accomplish its goals.
- **All participants are willing to contribute time, as well as other resources, towards the coalition's work.** Participants must feel that the benefit they derive from being a part of the coalition (and, in particular, the benefit of making progress in achieving their goals) outweighs the costs and effort involved.
- **All coalition members have buy-in from their key leadership to participate in and contribute to the coalition.** Coalitions struggle when lower-level staff participate in coalition meetings, but cannot deliver on promises and commitments because they lack the support of their immediate leadership.

All of these factors need not be present to start a coalition, but it is worth taking the time to think through where a group currently stands with each and of ways to strengthen any weak areas.

Identifying who to involve in the coalition

In order to develop collaborative solutions that address discrimination, coalition organizers should strive to include all of the key parties whose work intersects with the goals of the coalition. Precisely who those key players are will vary enormously depending on the scope of the coalition: does the coalition work on issues affecting multiple countries, or just one country, city, region or even a single neighbourhood? Every context requires a unique set of participants.

As a general rule, the broader and more inclusive the coalition, the greater is its potential impact. In thinking about who should be involved in coalition discussions and planning, it is important to identify the stakeholders for the problem that the coalition seeks to address and ensure that their voices are heard.

Example: In 2013, the Anti-Defamation League (ADL) in the United States helped to co-ordinate a loose coalition of 79 civil rights, religious, education, civic and professional organizations to persuade FBI officials and law enforcement agencies across the country to separately tabulate hate crimes directed against Sikhs, Arabs and Hindus. ADL's Washington Counsel, Michael Lieberman, notes that specific groups targeted for discrimination and hate crimes often lack the political power to bring about major changes on their own. "You need allies to win policy changes," says Lieberman.

"Stakeholders" are those who have a stake in the outcome of the coalition's work. This will include those who are directly impacted by discrimination and bias-motivated crimes, individuals and organizations that are currently involved with efforts to address these issues, opinion leaders (people who shape others' understanding of an issue), and those whose lives or work may be affected by the coalition's efforts.

Stakeholder identification:

When considering who to include in a coalition, it can be useful to look at the issue the coalition will address from as many angles as possible. It is also a good idea to get together with any current partners and brainstorm responses to each of these questions:

1. Who is most directly impacted by the issues that the coalition will address? This can include individuals, organizations that represent those individuals, and religious institutions, among others. Be sure that the list includes significant representation of women and others whose voices may be marginalized within the groups the coalition is seeking to engage.
2. Which organizations and individuals already work on this issue in some way?
3. Who do people listen to in relation to this issue? Are there elected officials, religious leaders, business and media leaders, student leaders or others who would bring greater credibility and visibility to the coalition's efforts? It often requires some effort to think beyond the most obvious individuals, such as the leaders of larger organizations. For example, medical professionals and teachers can speak

with authority about the ways that discrimination and bias-related crimes impact individual and community health. Law enforcement officials or military officers can invoke an important community safety perspective on the issue.

4. Who has done similar work in the past that the new coalition might learn from?
5. Who else is missing? Is the list representative of men and women in the community and of the group(s) facing discrimination?

When brainstorming, it is helpful to include the name of a specific contact person in each of the organizations and institutions considered. This information will be useful in the next steps of the recruitment process.

Having identified potential coalition members, it can be useful to divide this list into the *formal* and the *informal* sectors.

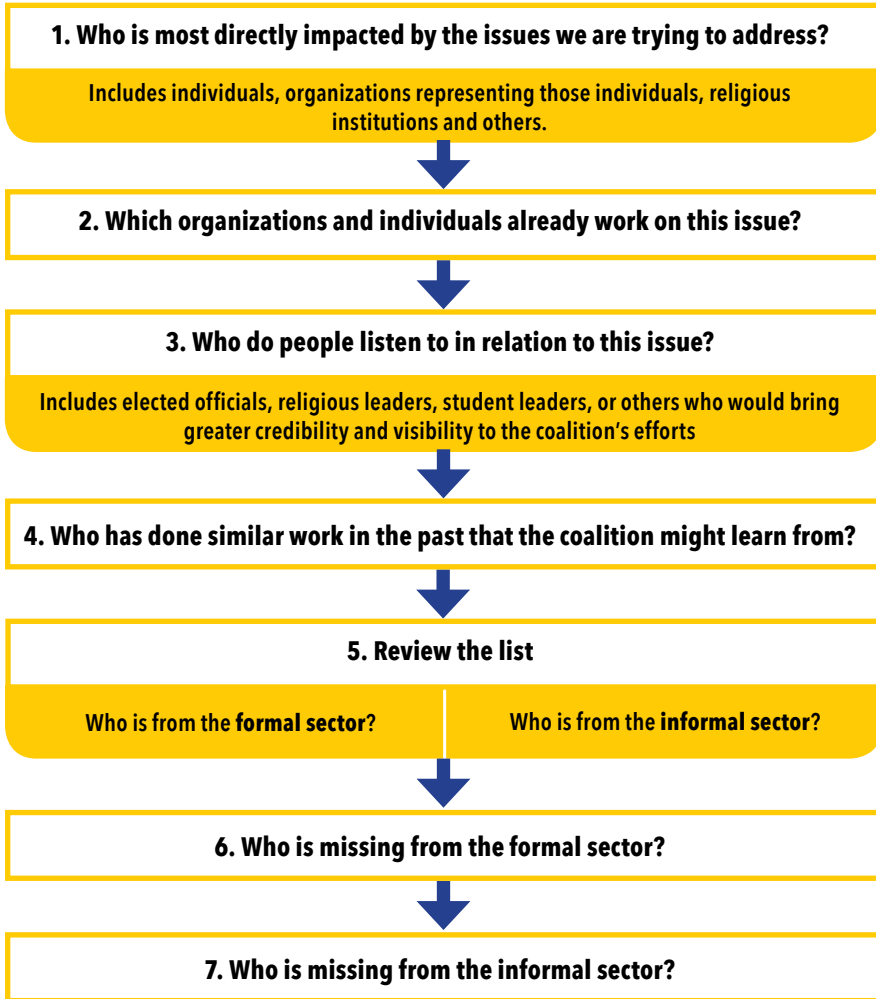
- The **formal sector** comprises the most common participants in a coalition: these include prominent organizations that usually have a budget, staff, marketing and other useful resources. They are easy to identify and approach. They can be found through a simple online search of the coalition's purpose (such as "non-discrimination + <the coalition's geographic focus>") and reached via contact information available online.
- The **informal sector** includes groups and individuals who have good connections to the people most affected by the issue that the coalition is addressing, but who may not have the same resources or staff capacity as those in the formal sector. For example, if the coalition addresses intolerance aimed at the Roma population, then it is useful to consider who in the Roma community can provide access to that population.

Identifying and connecting with potential coalition members in the informal sector will usually be a more challenging task. It requires conducting additional research and investigating links between formal and informal groups. For example, while most religious organizations are formal, they often incorporate informal groups that have excellent community connections, such as women's groups and youth groups.

Once groups representing the formal and informal sectors have been identified, it is good to take a step back and consider other potential coalition members missing from the list.

"It's a good practice to have a broad understanding of potential partners, but I do not recommend starting with all of them. Starting with a smaller group of more committed organizations, who can co-operate with a larger number of groups outside of the coalition, has worked very well for us. If you start with a large number of organizations, not all will put in the same amount of work and that will frustrate the ones doing the work." – *Tamás Dombos, Working Group Against Hate Crimes, Hungary.*

Stakeholder Identification Flowchart



Stakeholder analysis

After going through these steps, the long list of potential coalition members will likely make it impossible to effectively reach out to them all right away. This is a good sign. Recruitment should be an ongoing part of developing a coalition. The next step is to prioritize the list and build a recruitment plan. The Stakeholder Analysis worksheet in Appendix 2 is designed to help coalition builders to do just that.

The **Stakeholder Analysis** worksheet asks the following questions about each potential coalition member:

- What skills, capacities and or/resources can they bring to the coalition? This information helps to identify the stakeholders who have the most to offer.
- What is their potential role within the coalition? This will determine what they might be able to contribute to the group's efforts.
- What is their self-interest? Why would they join? Considering why potential members would benefit from joining the coalition is a useful tool when encouraging them to do so.
- How will potential members be recruited?
- What barriers might exist to recruiting them?
- Who will approach them and when? In addressing the question of when, it is a good idea to prioritize those who have the most to offer the coalition and those with the greatest self-interest in the coalition's work.

“There should always be idea-driven stakeholders involved who will work on behalf of the coalition, since participants might not always devote their full efforts to coalition activities. Be prepared to act as the locomotive of the process.” – *Anastasiia Aseva, Union of Councils for Jews in the Former Soviet Union*

As was done in the stakeholder identification process, it is a good idea to go through the list of potential candidates one more time and ask: Who is missing from this list? Is there anyone whose absence or inclusion would send the wrong message about the coalition's message of non-discrimination? Are women, young people and others whose voices are sometimes marginalized adequately represented?

It is important to bear in mind that failing to reach out to an important stakeholder can have serious consequences for the coalition:

- If the communities most directly impacted by discrimination are not involved with forming the coalition and developing its plan, or if coalition members include groups that are openly intolerant of others, then the coalition will likely lose credibility and may never be able to rebuild the trust needed to succeed.

- If groups already working on the issue are not engaged in the process, then the coalition’s approach may overlook an important strategic consideration that those groups have already encountered.
- If coalition builders do not reach out to opinion leaders who speak regularly about the issue, then they may make negative or uninformed public statements about the coalition that hinder its efforts.

Partner outreach and recruitment

The stakeholder analysis will have identified *who* to reach out to. The next step is to decide *who* within the coalition should make that contact, and *how soon* to do so. Here is a suggested method for making initial contact; however, this process should be adapted to fit the coalition’s specific circumstances:

- 1) Send a brief email or letter of introduction. Describe the reasons for starting the coalition and who is currently participating. Note that more specifics about the coalition’s work will be determined by participants in the coalition’s first meeting. Explain why they would be an important part of the coalition, and propose a meeting in person to discuss how they might be involved. Provide contact information and let them know that the message will be followed up with a phone call in a few days.
- 2) If they have not responded, follow up with a phone call. Refer to the previous message (but do not assume that they have read it) and explain again why they would be an important coalition partner. Suggest arranging a meeting to discuss this in more detail.
- 3) Come to the meeting with a clear idea of what this person could agree to (for example, invite them to join the coalition in order to be part of efforts to pass an updated hate crime law) and a fall-back request in case they think the first is too much (for example, ask them if they would reach out to a few key leaders in the local community who might be interested in the issue). At the meeting, if needed, start by establishing a personal connection (for example, through “small talk” about family, sports and other interests). When the time is right, talk about the coalition’s plans, ask what they think, then invite them to engage in the coalition. Regardless of their response, it is important to ask their opinion about who else should be invited to join the coalition.
- 4) Follow up with an email or letter thanking them for the meeting, confirming what they agreed to and providing details about the coalition’s next meeting or event.

Remember: People volunteer when someone they know asks them or when they see a clear connection between a request and their own self-interest or organizational interest.

In addition to reaching out to potential coalition members prioritized through the stakeholder analysis, it is a good idea to consider ways to engage all supportive community members in the coalition's work. This differs from recruiting groups in the informal sector in that it entails engaging those who have an interest in advancing non-discrimination, but who may not have existing connections or previous experience related to the coalition's goals. The process of engaging supportive community members will continue long after the coalition is active, but reaching out to them early on will allow interested participants to contribute their own views and experiences from the very beginning. Here are some strategies to consider:

- Using social media platforms and mailing lists to spread the word.
- Holding public meetings and house meetings. Such meetings can be pegged to an event related to the coalition's work, such as a meeting held after a bias-motivated incident if the purpose of the coalition is to address hate crime.
- Attending and participating in community meetings: this includes meetings that the community has already organized, whether it is a gathering in response to a hate crime or a community-organized fair or celebration. It is a good idea to first contact the meeting organizers in advance to discuss the most appropriate ways to promote the coalition at their event.

When conducting outreach, it is a good idea to have a concise explanation of the coalition's purpose and its current membership. At events, it can be useful to distribute flyers or handouts that briefly explain the coalition's purpose and how individuals can get involved. Setting up a website or social media page with the same information can make it easier for people to share information about the coalition, while developing a mailing list will enable interested persons to be updated about the coalition's activities.

Finally, when planning outreach, it is worthwhile to keep in mind that applying different recruitment strategies will result in a more diverse coalition. Recruitment conducted exclusively in the city centre is more likely to lead to a coalition made up entirely of urban dwellers. That is why coalitions must continually study their members, ask "who is missing?" and adjust their recruitment strategies accordingly.

Not everyone will say yes

Example: Connecting Actions convened a meeting of practitioners from across Europe interested in promoting interfaith dialogue to discuss starting a coalition to support this field of work. Even within this group, however, there were some participants who would not agree to join a coalition with others because of some aspect of their work.

Not all potential members will want to join the coalition. It is important to accept this, but also to ask them why not and to listen carefully to the subtext behind their words. The following is a number of reasons why people decline, and each may require a somewhat different response:

Concerns with the coalition's approach: Some people may have concerns about how coalitions approach a particular issue. If this seems to be the case, it is a good idea to open a dialogue with them and explore the issue further. Examine whether there is anything about the language the coalition uses, the strategies that it plans to employ or its current leadership that seems unwelcoming or inappropriate to those who experience discrimination and intolerance.

Wait and see: Some people and organizations will never join a brand new coalition. They may consider themselves too busy or simply want to see how things develop before they invest time and energy into an untested initiative. If they are generally supportive but still hesitant to join, ask if they would like to be added to the coalition's mailing list so that they can keep track of what's going on, or ask if the coalition can approach them at a later date.

Issue owners: It may be that there are people already doing work similar to, or even overlapping with, the work envisioned by the coalition. Many of these people will welcome the added legitimacy and support that a broad coalition can bring, but others may feel that the coalition infringes on "their" turf. They may view it as a potential competitor for funds and media attention. Consider approaching these people periodically with opportunities to be part of the coalition's programmes (perhaps as an expert speaker) or to sign on to advocacy efforts. As the coalition continues to engage them and acknowledge their expertise, they may come to see the value of collaborating more closely.

Hostility towards current partners: Some people are simply unwilling to work with other individuals or groups that are part of the coalition. This may be due to prejudices within society or institutions, or a result of interpersonal or interagency disagreements.

- If the concern involves personal or organizational dynamics, the individual could be invited to participate in the coalition through a working group in which the other individual or group does not participate.
- If a community or organization will not participate because another coalition member works on separate issues that this community or organization opposes, discussions can be held to see whether the two groups would agree to co-operate in order to address the limited area where their interests overlap. It may take multiple conversations to arrive at such an agreement.
- It may be that a community working on an issue that the coalition plans to address is prejudiced against another community represented in the coalition or holds strong beliefs that they view as incompatible with those of a coalition partner. In this case, there are a few options:
 - 1) Attempt an open and productive dialogue about this issue. Communities and organizations are made up of individuals, and it may be possible to find someone with the desire and influence to bridge these divides. Once identified, the

coalition can keep this individual informed of its activities and find ways to support them in opening up a dialogue within their community or organization.

- 2) If the objecting organization has an interest in supporting some coalition activities in spite of its unwillingness to co-operate with certain members, keep them informed of the coalition's plans and ways to get involved. Never exclude the other group from meetings or events to satisfy the objecting organization. The coalition's mission is to promote tolerance and non-discrimination, not to reinforce it.

Be prepared to acknowledge that some organizations conducting similar work may not truly support the coalition's mission. These individuals or groups are simply not appropriate partners. In such cases, the coalition must go about its work and engage with these organizations in the same way it engages with other groups, communities or organizations that it seeks to educate and to inspire a more tolerant view.

Example: Hungary's Working Group Against Hate Crimes has been able to maintain a large coalition, despite partner organizations having many different strategies and positions. Coalition members have agreed that they do not work together on areas where they see conflict. In this case, that means maintaining a strict separation between work against hate crimes (the coalition's focus) and work to address hate speech (an area on which members disagree).

“You don't have to agree on every issue. Your coalition can come together around a single issue where you have agreement. We just say, ‘Here are the things we agree on. At this table, we're not talking about issues we don't agree on.’” – *Michael Lieberman, Washington Counsel, Anti-Defamation League*

Ultimately, building a coalition requires a critical mass of engaged individuals and organizations, including representatives of communities directly impacted by the issues that the coalition seeks to address and organizations willing to commit time and resources to the coalition's work. As the coalition succeeds and gains a reputation as a welcoming and effective partnership, more people will join the effort, including many of those who initially declined.

Chapter 3

The Coalition Start-Up Meeting

This chapter describes the key components of a coalition start-up meeting. It lays out specific questions that the coalition should address, while emphasizing that discussions must take a back seat to the important work of establishing norms of mutual respect, shared leadership and accountability.

The first step is to identify a time and place where coalition members can come together in one place to discuss what the coalition should do and how it should function. It can often be difficult to find a time that suits everyone, so it is important to ensure that a diverse cross-section of the membership is represented at the meeting. Meeting organizers should be particularly mindful of making sure that the communities with the most at stake are well-represented. Online scheduling tools can be used to find a time that works for most coalition members.³

Setting the right tone

The first meeting of a coalition is important in setting the right tone for a respectful, engaging and constructive gathering. To this end, the coalition's close partners can be involved to help plan the meeting. If participants feel unwelcome or if the meeting is poorly managed, hostile or boring, they may not come back.

- Welcome newcomers as soon as they arrive and help promote friendly interactions before the meeting begins.
- Provide refreshments. Bear in mind that food choices also send a message about how welcoming and inclusive the coalition is. It is a good idea to ask participants beforehand if they would prefer kosher, halal, vegetarian and/or vegan options. Avoid foods and beverages that could create divisions among the group.
- Make sure that the meeting location is accessible and that appropriate arrangements are made so that people caring for children, including breastfeeding, and people with disabilities or language-related barriers can fully participate.
- Circulate a sign-in sheet to record the contact information of everyone present.
- Make sure the meeting has a clear agenda (circulated in advance) and stick to it. A sample agenda for a coalition start-up meeting can be found in Appendix 2.
- Respect people's time and be sure that the meeting does not go on longer than announced.

Start the meeting by establishing ground rules and norms. This creates an atmosphere in which group members will feel able to help each other follow those norms. Having the group work together to develop these ground rules builds a sense of power among participants and can help create an environment where shy or vulnerable people can participate more freely. Common ground rules are:

³ Examples of scheduling tools in use at the time of publication include Doodle, NeedToMeet and Meeting Wizard.

- One person speaks at a time.
- Listen to what other people are saying.
- Silence cell phones.
- No mocking or attacking other people's ideas.
- Agree to disagree – it is okay if people do not see eye-to-eye on everything.
- Respect each other and do not judge.
- “Step up/Step back” – this is a technique to help those who do not usually speak much at meetings to *step up* and participate more, and to remind those who speak a lot to *step back* and give others a chance.

Ground rules can be developed by first explaining to participants their purpose, and then including their suggestions on a blank flipchart. If nobody offers a suggestion, one of the ideas above can be used to get ideas flowing. Once the group has established five or six rules, check to see if there are any other suggestions before asking the group if they agree with these ground rules and are willing to follow them. Display the rules on the wall and remind the group that it is everyone's responsibility to enforce them.

Building trust and understanding

It is important to keep in mind that some people at the meeting may not know each other, some may work together frequently, while others may have had a bad experience during a previous attempt at collaboration. The participants cannot be expected to work together productively without first building trust and understanding within the group.

People who are meeting for the first time will often make assumptions about each other based on appearances. This can make some feel that they are being judged harshly or undervalued. Spending time at the beginning of the meeting to help build a sense of connection and get participants aligned around a common language and approach will pay off significantly in the long term.

Meetings often start with introductions and sometimes an “ice breaker” – a question or activity designed to get people talking and to get to know each other. It is a good idea to begin the coalition start-up meeting by going around the room and asking participants to introduce themselves (including information such as name, organization or affiliation, if any), but it is also important to give participants more time to really understand who is in the room and why they are there.

Introducing participants

- Divide meeting participants into four groups and ask the groups to gather in different parts of the room.
- Give the groups about ten minutes to discuss a small number of questions among themselves. These may include: What are the greatest challenges facing the country, region or city in which the coalition works? What does the coalition plan to accomplish? Are there any concerns about this coalition? What unique skills/background does each member bring to this coalition?
- Have each group appoint someone to take notes and report back on the group's responses. Be sure to inform participants two minutes ahead of time before wrapping up. At the end of the designated time, ask all participants to come together.
- Call on each group to give their responses to the first question, while someone makes notes. When groups give similar responses, have the note-taker make a check mark by it instead of writing it out again.
- Go through the rest of the questions using the same process. If there are more personal questions (such as experiences with discrimination), ask if anyone would like to share their own experiences rather than having them relayed to the group. Pay attention to gender balance throughout these exercises. If most of the people speaking to the full group are men, ask if any women would like to share insights from their small group discussions or from their own experiences.
- After going through all of the questions, ask if anyone has any observations they would like to share based on what they have heard. It may be appropriate for the meeting organizer to make observations about any common themes that arose, such as "It seems like people are generally excited to be here, but worried that being in this coalition will take up too much time. Let's keep that in mind as we move on."

An exercise that can be useful to help meeting participants understand how others in the room think about the issues that the coalition wishes to address, such as discrimination or hate crime, is called a moving debate or a spectrogram. See the tools in Appendix 2 for instructions on how to facilitate this exercise.

Questions to address at the start

At its initial meeting, the coalition will need to address a series of questions. It is important not to rush participants from one question to the next. Make sure that each participant has the chance to provide input and that their input is recorded (ideally on a flipchart or whiteboard for all participants to see). The goal of the meeting is not just to address questions, but to generate a sense of mutual understanding and connectedness so that participants feel positive about coming together to take collective action.

- *What community or issue does the coalition address? Who is it hoping to mobilize?* This will include deciding on the geographic area, the populations involved and the scope of the issues that the coalition is addressing. Many coalitions choose a name that reflects their response to this question, such as the European Network Against Racism.
- *What are the context, history and community climate of the issue?* It is critical to assess this at the start of a coalition. For example, a coalition formed to work against hate crime might address the following questions during its first meeting: What is the history of the problem? Has hate crime been part of the community's history or has it emerged as a result of recent trends? What is the history of attempts to address the issue? Has the community tried to create coalitions in the past? Did they succeed or fail, and why?
- *What are the root causes of the issues that the group has identified?* Root causes are the underlying issues that contribute to a larger problem. The root causes of discrimination and related intolerance often include economic pressures (including discrimination), fear for one's safety or way of life and a lack of understanding about another race, culture or religion.
- *What is currently being done to address the issue? Where are the gaps in current efforts?*

“Make sure you are not doing something that others are already doing. Be clear about the coalition's aims and be clear what you are not going to do.” – Creating Successful Campaigns for Community Living, European Coalition for Community Living.

- *Why will building a coalition be a helpful approach to addressing the issue? What is it that coalition members can do together that they cannot accomplish separately?*
- *What values should inform the work of the coalition and how coalition members interact with each other?*
- *What is the coalition's purpose and vision? How will the coalition put its values into action to move towards its vision? What brings people together at the start-up meeting may not end up being the ultimate goal and vision of the coalition – that is*

something that all coalition members must decide together. See below for a helpful exercise for approaching this question.

- *What issues are important and closely related to the purpose?* Issues related to intolerance and discrimination are often closely intertwined with other issues. To achieve its purpose, the coalition may need to engage in or support efforts to address those related issues. For example, economic pressures, as well as religious and cultural differences, are frequently factors in discrimination against recently arrived refugees.
- *Who should be part of this effort? How will the coalition engage them?*

Example: At the start-up meeting for the Moscow-based Coalition Against Hate, participants worked to align their shared desire to increase public awareness of cases of religious intolerance and violence based on prejudice. They agreed to share references and links to be used in the newsfeeds on the websites of all members, and later on social media. In doing so, the group built trust and understanding as they explored their shared goal of eliminating all types of intolerance.

Creating a common vision

If time allows, some of the start-up meeting may be devoted to developing a common vision for the coalition. This is a critical step towards aligning members' goals, and will create a positive atmosphere in which they can work together. Appendix 2 contains an exercise for developing a shared vision to help guide coalitions through this process.

Tip: Make sure that the group has a way to communicate and share materials between meetings. This can be done by creating a private and free-of-charge LISTSERV through Google Groups, Yahoo! or other providers (such as Basecamp or Slack). Such applications also allow list members to upload documents and other materials to share with the rest of the group. A private group on Facebook or other social media can also be set up to allow members to communicate with each other. Make sure that the data shared on these platforms – including members' contact details – are not made publicly accessible and that members are aware of the platform's privacy settings.

Close on the right note

It is a good idea to schedule time at the end of the meeting for a closing that will leave participants motivated to continue the coalition's work.

- 1) If possible, figure out when the next meeting will be, what that meeting will accomplish and what needs to be prepared in advance.
- 2) Ask each participant to list what they will do to follow up on the meeting. If they cannot think of anything, ask them who they can invite to the next meeting or prompt them to take on another unassigned task. Make sure that everyone leaves with a follow-up task to undertake before the next meeting.
- 3) Ask each participant to say one or two words describing how they feel about the coalition now. If the meeting went well, participants are likely to use words such as "energized" and "inspired". It is also likely that some participants will respond with "overwhelmed". If a participant voices a surprising or concerning response, it is a good idea to talk to them one-on-one after the meeting.
- 4) In closing, remember to thank everyone for coming and for contributing their thoughts and ideas to the coalition's efforts.

Follow-up

The day after the meeting, send an email to participants thanking them again for coming. Include information on any decisions made at the meeting and make a note of participants' follow-up commitments and the timeline. Remind them to put the next meeting on their calendar and ask for volunteers to help plan that meeting. This immediate reinforcement is extremely important in ensuring that coalition members continue to feel like they are a valued part of a well-managed effort.

It is also a good idea to call a few participants to ask how they think the meeting went, and for their advice on how the coalition should move forward.

It may be that not everyone who showed an interest in the coalition turned up at the first meeting. Get in touch with those people and ask if they would like to know what happened and the coalition's next steps. Ask if they would like to receive updates about future meetings. If they are supportive but have no time to participate, ask if they can send someone else from their community or organization, or reach out to someone who could bring a similar perspective.

When preparing for the next meeting, contact people who took on important tasks to see if they need any support in their roles. It is likely they will appreciate the reminder, and this communication can be used as an additional opportunity to see how members feel about the coalition before the next meeting.

Chapter 4

Coalition Structure, Governance and Leadership

A coalition is a collaborative effort that requires both collective decision-making and power sharing. As such, the coalition's structure and leadership style should differ in form and function from that of a traditional hierarchical organization. In order to be effective, a coalition for tolerance needs an appropriate and explicit structure that reinforces these principles of collaboration. This chapter will review the components of coalition structure and aspects of coalition governance in order to help coalitions decide which structure and governance best suits its purpose and membership.

The *structure* of a coalition is the framework around which it is organized. All groups have some structure, whether they consciously choose it or not. Coalition structures vary, and no one structure works best for all collaborations.

The *governance* of a coalition refers to how decisions are made in the coalition, who is empowered to make those decisions and how leadership responsibilities are assigned and shared.

The coalition should have a clear, written understanding of its structure and governance, even if this amounts to just a one-page description or list of coalition operating principles. Once established, a coalition's structure and governance will evolve over time and may look quite different within a few years. This is to be expected, since coalitions are living dynamic systems and need to modify as they grow and adapt to changing situations.

The structure and governance plan will allow the coalition to realize its goals. Core elements of a successful coalition's structure and governance include:

- clear communication;
- principles for shared decision-making;
- roles and responsibilities; and
- the capacity to act.

“Our coalition’s non-hierarchical structure nearly led to the destruction of the coalition itself. When issues regarding local politics and refugees came up in a city council meeting, one coalition member was quoted in the press and identified as the leader of the coalition. This infuriated another coalition member who felt that he was, in fact, the coalition leader. Power struggles are rampant in a structureless organization.” – *Zachary Gallant, Integrationswerkstatt Unkel, Germany.*

A coalition's structure reflects its values

It is important for coalitions to spend time discussing how they will make decisions and the best structure for accomplishing their work. Coalitions must be aware that the decisions they make can either reinforce or undermine the values that they are working towards.

For example, the European Network Against Racism (ENAR) describes itself as follows:

“Our mission is to achieve full equality, solidarity, and well-being for all in Europe. We want to allow all members of society, whatever their skin colour, ethnicity, sex, gender, religion, disability, age or sexual orientation, to participate and be included in society. We envision a vibrant and inclusive society and economy that embrace equality and diversity and the benefits of a racism-free Europe.”

Based on this description, a newcomer to the coalition would reasonably expect ENAR meetings to be attended by a diverse group that gives all participants a voice in making decisions. If, on the other hand, meetings are dominated by a small group of individuals and decisions are made without the support of those in the group who have been the target of racism, the newcomer might conclude that ENAR does not actually embrace the values laid out in its mission.

In fact, ENAR is quite conscious about making sure that its structure and programmes fully represent the Network's mission. A critical value for the coalition is practicing its principles, meaning that ENAR operates through a flat hierarchy that seeks to develop the talents of team members and “create champions”. ENAR describes its member organizations as its strength, and as “the voice of victims of racism and related discrimination throughout Europe. They join ENAR to build a strong platform for their aspirations for an inclusive Europe.”

“The power of a coalition is that you have diverse profiles. It's important to share visibility so that people see the diverse faces of the movement and to show the numerous voices fighting against discrimination.” – Julie Pascoet, Senior Advocacy Officer, ENAR.

The basics of coalition structure

All coalition members should have some input in decisions about the coalition's structure. Shared decision-making is a key principle for successful coalitions and needs to be a part of this process as well. At the same time, the coalition should not get so immersed in the process of creating a structure that the project takes up significant time that could be used in moving towards their agenda.

A simple, one-page set of operating procedures can be a solid starting point. Coalitions that spend large amounts of time writing by-laws, operating rules and so on often get

side-tracked from their goals. As the coalition matures, there will be time to develop and expand the set of operating procedures. Appendix 2 contains a template for developing a statement of the coalition's operating procedures, as well as an example of operating principles drawn up by one coalition.

The following are elements to consider when determining a coalition's structure:

Whole coalition meetings: It is a good idea to schedule regular meetings involving the coalition's entire membership. These meetings provide a forum where members can exchange information, receive updates from working groups and address larger emerging issues as a whole. The entire coalition should aim to meet once a month. Meeting any less frequently can greatly reduce the coalition's chances of making a significant impact on their issue and in their community. While in-person meetings are most helpful in building relationships between coalition partners, online meetings (via Skype, Google Hangouts and other platforms that offer free-of-charge and low-cost options⁴) can help maintain progress between gatherings.

Working groups, committees and other subgroups: The core work of coalitions is often performed by groups that are smaller than the membership as a whole. These smaller configurations can go by many names, including "task force" or "team". The most important consideration is to ensure that the structures are in place to enable the work to progress efficiently and that the work of each subgroup is communicated back to the entire coalition.

Typically, *committees* are the most formal type of subgroup. For example, many coalitions create an executive committee (or steering committee) made up of individuals in key leadership positions, such as coalition leaders and working group chairs. This group is often tasked with developing the agenda for coalition meetings and may be given the power to make some decisions on behalf of the coalition. The coalition may also have committees that focus on membership recruitment and retention, fundraising and communications, among other areas.

Working groups are often tasked with a specific issue, goal or programme related to the coalition's work (see Chapter 5, below). They generally consist of a subset of coalition members who have a particular interest or expertise in the topic that the working group will address, and are willing to devote the time needed to do this work. Each group should meet regularly to create and co-ordinate action plans on their assigned issue. The exact frequency will vary depending on the nature of the work, but it is a good idea to meet at least once in between larger coalition meetings. Some members will choose to work only in the subgroups rather than attend the larger coalition meetings.

⁴ Other online meeting platforms include GoToMeeting, Dimdim, Microsoft Office Live Meeting and WebEx. Because technology changes frequently, visit Nonprofit Tech for Good (listed in Appendix 1) to learn about the latest tools.

Agendas and minutes: As discussed in Chapter 3, meetings need clear agendas. Coalition members should receive an agenda prior to the meeting and minutes afterward.

Coalitions often feel that their meetings do not need to follow an agenda, but this can lead to rambling discussions and a lack of focus. An agenda will provide continuity with the last coalition meeting, identify new items for group discussion and/or decision-making, provide follow-up on commitments made at the last meeting, and allow time for updates and questions from the various working groups.

Meetings require a note-taker to write down what has happened during the meeting. It is not necessary to transcribe every word. The note-taker should focus on recording the main points of each discussion, any decisions made by the group and any next steps. Notes may be taken by an assigned coalition member, or it can be a shared function with members taking turns. Be sure to develop a clear system for rotating note-taking duties that equally distributes this burden between all coalition members, including men and women, and experienced member and newcomer.

Roles and responsibilities: Coalition members should have clear roles and responsibilities. They all share the responsibilities of attending coalition meetings, keeping the organization they represent well informed as to what is happening in the coalition, volunteering to join a working group, and so on. Such activities represent ways in which the members agree to be accountable to the coalition. In some coalitions, new members are asked to sign an agreement outlining their responsibilities before joining. The purpose of establishing roles is to encourage each coalition member to take on some responsibility and to avoid situations whereby members only attend meetings as passive participants. Other roles and responsibilities can be added as the coalition's structure is developed.

Example: It is important that someone in the coalition takes responsibility for the co-ordination and administrative work needed to keep the group on track. The European Coalition to End Violence Against Women and Girls is an ad hoc coalition of 28 European civil society networks. The European Women's Lobby co-ordinates regular meetings and ensures that email updates go out to member organizations on a regular basis.

Communication: Communication is a key function of a coalition's structure. Communication is both internal (aimed at keeping members informed) and external (intended to raise awareness in communities about the coalition and its activities and successes). The most common internal communication practice is to send out emails, together with meeting agendas, notifying members of upcoming meetings, followed by minutes sent out after the meeting has been held. Newsletters are another effective way of communicating, and can include notices, updates and special announcements from coalition members. They also help to strengthen the perception of legitimacy, as they typically feature the coalition's name and logo. Further recommendations about

how coalition members can internally communicate with one another can be found at the end of Chapter 3.

Strategies for external communication

Developing a communications strategy can help a coalition advance its goals. While the details of such a strategy are beyond the scope of this publication, the following are a few basic considerations:

- Make sure the coalition has clear guidelines on who can issue communications and speak to the media on behalf of the coalition, as well as the procedure for approving these communications.
- Set up a website for the coalition, if possible. At a minimum, establish a presence on social media (such as Facebook and Twitter, or whichever platform is widely used in areas where the coalition works).
- Work with coalition partners to build a list of media contacts that includes reporters and bloggers who regularly write about issues that the coalition addresses, as well as relevant publications and websites. Develop a system (or identify a partner with access to a system) to distribute press releases and other communications to those on the list. When issuing a press release, be sure to also share it on social media.
- Localized campaigns may also benefit from more direct communications, such as posters, flyers, mail or phone calls. Another idea is to set up an informational table in a local marketplace or at a widely attended community event.
- Consider starting a mailing list or newsletter to keep other like-minded organizations informed about the coalition's activities. When a potential partner declines to join the coalition, they can instead be invited to join the mailing list so that they can follow the coalition's work.

Additional resources on promoting awareness and interest through communication are provided in Chapter 45 of the University of Kansas' Community Tool Box.⁵ In addition, Nonprofit Tech for Good (<http://www.nptechforgood.com/>) offers advice on technology and trends in online communications.

Ground rules: The previous chapter described a process for developing ground rules for the first coalition meeting. When developing the coalition's structure, it is a good idea to revisit these ground rules and see if there are any to add or change. Once the entire coalition has agreed to the ground rules, make sure they are visible at every meeting and occasionally review these rules with the group.

End of meeting assessment: At the end of each meeting, it is a good idea to assess what the group think worked and what did not. This can be done using a flipchart divided

⁵ See: <http://www.ctb.ku.edu/en/table-of-contents/sustain/social-marketing>.

into two columns: one headed with a plus (+) sign, to indicate what worked, and one with a minus (-) sign. Ask participants to suggest what was positive about the meeting (for example, “everyone participated”), and any problems encountered (for example, “two people continue to dominate the discussion”).

Governance and decision-making

Governance describes how decisions are made in the coalition, who is empowered to take those decisions, and how leadership responsibilities are assigned and shared. The governance and structure adopted by a coalition should allow it to function more efficiently and effectively. This section covers some of the questions that the coalition will want to address.

Example: The European Union of Jewish Students (EUJS) represents 35 member organizations from across Europe. EUJS is led by a president, an executive director and eight board members elected by EUJS member organizations at the EUJS General Assembly. The board is geographically representative, with each member elected to represent Jewish students in specific countries. The EUJS office is based in Brussels and managed by the executive director, who is appointed by the elected board. The entire governing body and professional staff of EUJS is composed of youth, reinforcing its peer-to-peer guiding principles.

How will the coalition make decisions?

It is important that the coalition establishes how decisions will be made, as well as which decisions will be made by which people, committees or working groups. Regardless of the method adopted, the decision-making guidelines must be clear and written down.

Perhaps surprisingly, “majority rules” voting – whereby decisions are passed by a majority of votes – is not the most commonly used method of decision-making for coalitions; consensus is usually the preferred choice.

In a consensus, the entire group will agree on a certain course of action. There are variations as to how consensus is established. In a *hard consensus*, everyone must overtly agree by saying or writing “yes, I am in agreement.” More common is a *soft consensus*, in which the group can move forward without universal agreement if, after everyone has been given an opportunity to explain their position and have questions answered, those who disagree do not feel so strongly that they would block the group from taking action.

In many circles, consensus decision-making has an undeserved reputation for being too time-consuming, or for simply being an unrealistic standard that prevents groups from taking action. In fact, there are very strong reasons why coalitions should consider adopting the consensus method for reaching decisions.

A group seeking to achieve a consensus commits to finding solutions that everyone actively supports, or at least can live with. This ensures that all opinions, ideas and concerns are taken into account.

For coalitions working to promote tolerance and non-discrimination, a consensus-based process holds the added benefit of ensuring that a majority of members will never take decisions that are not supported by those who have the most at stake. An example of how to facilitate a consensus-based process is provided in Appendix 2.

Which decisions will be made by whom?

Once the coalition has determined *how* decisions will be made, it must then determine *who* can take those decisions. It can be valuable to spend some time discussing the different kinds of decisions that the coalition is likely to encounter, and determining where in the coalition's structure those decisions belong. The most important decisions, such as those relating to coalition strategy and identity, should be made by the coalition as a whole. This helps to ensure that all coalition members feel that they have an equal voice in the coalition's direction, allows for discussions about areas of disagreement, and reduces the likelihood that decisions will need to be revisited at a later date.

In order to ensure that the coalition's work can progress between meetings of the entire membership, the group should determine whether decisions can be made by email vote, provided no one objects.

Decisions about whether or not to admit a particular group as a new coalition partner are best made by the entire coalition. The membership committee can identify prospective partners and invite them to a coalition meeting, but a vote involving all members should be held to decide whether or not to admit them.

Core communications, such as talking points and press releases, should be approved by the entire coalition, particular in the early stages when the coalition is still finding its voice and agreeing on how to present itself to the world. Once the coalition's basic identity has been established, members may agree to allow the communications committee or individual working groups to take their own decisions on less formal communications, such as blog posts.

What decision-making powers should a steering or executive committee have?

In coalitions, the role of a steering committee, executive committee or convening group is one of co-ordination, communication and facilitation. The steering committee does not "lead" the coalition, but makes sure that information flows and processes move forward so that the coalition can be as effective and collaborative as possible.

A steering committee might fulfil the following roles:

- Co-ordinating member activities;

- Managing administrative activities (including record keeping, making meeting arrangements and distributing agendas and minutes, among others);
- Serving as a centralized communication source for information shared among coalition members and other stakeholders; and
- Securing and providing expertise and resources required to sustain the coalition and to implement action plans.

If the coalition decides to have a steering committee, careful thought should be given to its composition. This is because steering committees tend to co-ordinate more closely than the coalition as a whole and can hold a level of control over setting the overall agenda for the group. Some steering committees are made up of representatives of each working group and, as such, serve to facilitate co-ordination between the groups. The coalition may also decide to designate seats on the committee for important constituencies that have a large stake in the coalition's work. For example, a coalition seeking to amend hate crimes laws might reserve seats on its steering committee for representatives of affected communities. Consider rotating the membership of the steering committee each year to facilitate shared leadership.

“Decision-making and communication are key to a coalition’s success and very challenging. It can create a lot of frustration if you don’t think them through. It is important to know who needs to decide what at which level. Talk about how you will ensure that coalition members know what is happening while not overloading them with communication.” – *Julie Pascoet, Senior Advocacy Officer, ENAR.*

What is the decision-making role of each working group or committee?

The coalition will want to decide, and record in writing, the responsibilities and accountabilities of the working groups discussed above. Which decisions might they be able to take on their own? Under what circumstances should they report back to the larger group or the steering committee before a final decision is reached?

One solution is to link working groups’ decision-making powers to specific activities. For example, working groups may be empowered to take decisions necessary to implement a plan that has been approved by the entire coalition. These decisions generally involve more day-to-day issues (such as where to hold a training or what foods to serve), rather than more fundamental questions relating to coalition strategy and identity.

Example: The Coalition for Combating Discrimination (CCD) in Ukraine adopted a structure that includes an “expert group” that provides methodological and consulting assistance to CCD member organizations in implementing their projects, regardless of which organizations the experts represent.

Leadership style

As discussed above, the way the coalition operates reveals a lot about its values, including for prospective members. The leadership style of those who represent the group is one of the most visible ways in which this message is conveyed.

To successfully lead a broad, inclusive and welcoming coalition requires a collaborative style of leadership. Unlike other leadership styles that emphasize authority, decisiveness and hierarchy, coalition leaders excel when all members have ownership of the decisions and direction of the group. The collaborative leader must be able to:

- Be inclusive and promote diversity, including mainstreaming gender;
- Share power and practice shared decision-making;
- Resolve conflicts constructively;
- Communicate clearly, openly and honestly;
- Facilitate group interaction;
- See the big picture and help others to see it; and
- Nurture leadership in others and encourage their commitment.

In addition, a successful collaborative leader should strive to be flexible, trustworthy and patient, and to instil energy and hope into the group's efforts.

The following are some helpful “dos and don'ts” of collaborative leadership:

- DO remember to delegate equitably. Sharing responsibility and tasks builds ownership and enables more work to be accomplished. Be sure that both higher profile and administrative tasks are equally divided among men and women.
- DON'T take on too much. Leaders cannot and should not attempt to do everything simultaneously and by themselves. Therefore, it is critical that they set priorities.
- DON'T take it personally. Conflicts, failures and other problems will arise in any coalition. Coalition leaders need to keep perspective and not to take these personally.
- DO stay action-oriented. Leaders must focus on moving towards the coalition's goals. This allows all members to feel like the time they contribute is worthwhile.
- DON'T steal the limelight. Coalition leaders should always attribute successes to the work of all participants and the entire coalition. A leader should not become the voice and face of the coalition. Rather, the coalition should assign spokespersons to represent the group when needed and seek to spread this responsibility broadly so that all members are offered the opportunity to serve as spokespersons.

- DON'T avoid conflict. Coalitions are more likely to effect changes in the community when they confront conflicts head on, even if they cannot resolve all their differences.
- DON'T forget to celebrate the small victories. Coalitions should not wait for a big success to celebrate. Make celebrating even modest successes a part of every meeting and newsletter.

“We need coalitions to win. And it can be particularly powerful to show that your coalition includes groups that wouldn't normally work together. For example, building a coalition that visibly includes law enforcement and civil rights groups helped us to gain more attention about the importance of hate crimes legislation – elevating it to a criminal justice issue, not just victim protection – and resulted in increased public awareness and support for the bill.” – *Michael Lieberman, Washington Counsel, Anti-Defamation League.*

Chapter 5

Developing a Coalition Plan

The ultimate goal of a coalition is to bring about changes to programmes, policies and practices in order to promote the coalition's goals. For example, coalitions may come together to promote the adoption of anti-discrimination training programmes in the workplace, pass policies that criminalize hate crimes, or change the way that law enforcement officials track reports of bias-motivated crimes. The best way to accomplish these goals is through thoughtful and collective planning. This chapter will review the elements of a plan and offer a variety of approaches for coalitions to facilitate better planning.

The importance of planning

Often, groups will not want to put a lot of time into planning, particularly when they believe they know what they need to do and how to go about doing it. However, investing the time to develop an actual written plan can bring multiple benefits. These include the following:

Greater connectivity: Simply spending time on developing a mutually agreeable plan will increase the sense of connection among coalition members. Over the course of developing a plan, coalition members will gradually transform from a collection of individuals representing their own organizations and interests into a team searching for the best solution for the group as a whole.

Greater alignment: As they discuss the problems that the coalition seeks to address, as well as their root causes and possible solutions, coalition members will learn from their partners' experiences. Ultimately, this will help the group to arrive at a shared and deeper understanding of the issues they seek to address and possible actions to take.

Greater efficiency: Spending time discussing the coalition's plan provides each member with an opportunity to identify the ways in which they will contribute. This will allow each member to focus on their greatest strength and will help to avoid duplicating efforts, enabling the coalition to work more efficiently.

Greater buy-in and accountability: People are naturally more committed to plans that they had a role in developing. Similarly, if someone commits to doing something in front of a group, and that commitment is documented in a plan, then the individual is more likely to deliver and the group has a mechanism to ensure accountability.

The plan itself: A coalition's plan is the roadmap for how it will achieve its goals. It outlines who needs to do what and when, and provides the means to determine whether the coalition is on track or if it needs to make adjustments along the way.

The planning meeting

The coalition should aim to schedule a full day for its planning meeting (or at least a half day). The entire group should participate, as well as any close advisers. It is important to designate a skilled facilitator – either a coalition member or someone brought

in specifically for this purpose – to keep the discussions on track. The advantage of bringing in an outside facilitator is that it allows everyone from the coalition to participate fully and equally.

The next paragraphs provide a fairly common process to follow during the coalition’s planning meeting.

1. Conduct a SWOT Analysis:

The Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis should be conducted at the beginning of the planning meeting to ensure all participants have a shared understanding of the starting point for the coalition’s planning. It is also a useful “warm up” exercise to help people feel comfortable speaking to the group and to get them to think critically before they start planning.

A SWOT analysis can be conducted by asking the group to brainstorm what the strengths, weakness, opportunities and threats are within the coalition. It is a good idea to write down the group’s responses. Under “strengths” the group might include coalition partners who are recognized experts, those with access to media organizations or those with strong ties to important policymakers. “Weaknesses” might include a lack of time among members to dedicate to the coalition, a lack of representatives from a particular community or the absence of a particular resource. The group may come up with more weaknesses than strengths. If this is the case, then the group should be reassured that this is not a cause for concern.

“Opportunities” and “threats” both originate outside the coalition but have an impact on the coalition’s work. It is not uncommon for a group to see certain trends as both an opportunity and a threat. For example, a surge in migration could provide an opportunity, as it will likely create more coverage of issues concerning tolerance and discrimination, but it could also represent a threat if there is an increase in bias-motivated incidents against migrant communities.

The group’s responses to the SWOT analysis should be hung on the wall for the remainder of the planning meeting. Remind the group that the purpose of the coalition’s plan is to make the best use of its strengths, find ways to address its weaknesses, make the most of opportunities, and identify ways to respond to and minimize threats.

2. Review the coalition’s values, vision and mission:

The coalition will likely have developed or begun developing its values, vision and mission at the start-up meeting. It is a good idea to review these, and to ask the group to suggest modifications in order to reach consensus on why the coalition exists and what it stands for. This will ensure that all members have a shared understanding of what the coalition is planning for.

“Putting achievable, specific goals at the centre of the coalition is important. A coalition that’s just about something very general doesn’t really work. Have a clear goal in mind and have organizations on board that care about that goal. If you achieve that goal, it brings cohesion to the coalition that lets you move towards something sustainable.” – *Tamás Dombos, Working Group Against Hate Crimes, Hungary.*

3. Developing a coalition plan: goals, objectives and strategies:

Many different planning models can be applied to developing a coalition’s plan. They all serve the same purpose, but may use different terminology. If there is a particular model that coalition members are familiar and comfortable with, then feel free to use it. The purpose of developing a plan is to ensure that all members arrive at a shared understanding of the coalition’s goals and how it will achieve them.

A sound and feasible coalition plan will contain the following elements:

1) Goals

Goals translate the coalition’s mission into concrete directions. They reflect its vision for the future. Therefore, coalition members should consider what they would like to have achieved by the end of the year, and where they would like the coalition to be in two years. The goals should be attainable, and formulated so that they build on one another to avoid splitting resources across multiple objectives.

Goals represent the broader purpose of the coalition and, as such, should be developed to reflect each of its key functions. Think about both external goals that the coalition plans to develop, such as programmes or campaigns, as well as internal, organizational-development goals, including those related to membership recruitment, leadership development and resources. Groups often try to take on too much at the planning stage. That is why it is a good idea to limit the list to just a few, key goals. New coalitions should aim for no more than two or three achievable programme-related goals.

2) Objectives

Objectives are the major accomplishments that the coalition seeks to achieve over time. Objectives differ from goals in that they are specific and measurable; they are the intermediary achievements the coalition sets in order to realize its goals.

3) Strategies or Tactics

Strategies are the specific tasks the coalition will perform in order to achieve its objectives. Strategies should follow a timeline, and a specific person should be made responsible for ensuring their completion. Make sure that the coalition’s strategies are specific and lead logically to its objectives.

4) Timeline

Develop a calendar marked with the dates by which each strategy in the plan is due to be completed. If possible, avoid defining strategies as “ongoing”. When developing the timeline, remember to account for holidays and other scheduled events that may influence the coalition’s ability to work. Assign one coalition member to oversee each task.

The coalition may only manage to develop its goals, objectives and a few preliminary strategies during its planning session. Therefore, it can be a good idea to create working groups tasked with defining strategies and a timeline for each goal. These strategies and timelines can then be discussed and approved by the entire coalition at its next meeting. Make sure everyone is clear on the process and deadlines.

Appendix 2 contains a simple template for a coalition plan, an exercise to develop a shared vision and a worksheet that working groups can use to develop more detailed action plans for the goals they have been assigned to work on.

Passport to the Future: an alternative planning process

Coalitions are often in need of a guided planning process to help ensure that their initiatives are based on a solid understanding of the issue and achieve the desired outcomes. Passport to the Future (also called the Tearless Logic Model) is a simple process consisting of a series of questions that can be used to develop a coalition’s plan, and which can be completed in less than two hours.

Appendix 2 contains the complete set of questions for this process. The Passport to the Future model is best delivered in a facilitated session to guide coalition members through each question. The group’s answers can be written down on separate sheets of paper placed at the front of the room. Once the group has followed this process, their responses can be converted into goals, objectives and strategies to develop a plan, as described above.

4. Review the plan:

Before closing the meeting, spend some time as a group reviewing the goals and objectives developed during the meeting. Return to the SWOT analysis and ask whether the coalition’s plan adequately addresses the strengths, weaknesses, opportunities and threats identified. If not, how can the plan be adjusted? Next, review the values, vision and mission. Will the goals that have been developed bring the coalition closer to its mission? Are they consistent with its values? If not, what should be changed?

Plan to review the plan

Far too often, coalitions devote a significant amount of time and energy on developing a plan, only to put the plan in a drawer and ignore it until they realize that a new plan must be developed. This process is not only counterproductive; it can be discouraging for members to see that the energy and ideas that went into planning were not put to good use.

Therefore, as the coalition develops a planning timeline, it is a good idea to include opportunities to assess the coalition's progress and adjust its strategies, if necessary. Tracking and evaluating the plan is discussed in more detail in Chapter 7 of this guide.

Chapter 6

Sustainability

Some coalitions form to achieve a specific goal and then disband immediately afterwards. For example, a temporary coalition was formed in Kazakhstan for the sole purpose of developing a shadow report on that country's compliance with the United Nations Convention on the Rights of Persons with Disabilities. Other coalitions, however, come together to address longer-term societal issues. For example, the Europe-wide Civic Solidarity Platform was established to help civil society groups work in a more effective and co-ordinated manner on issues including racism, xenophobia and intolerance. Coalitions working to address long-term issues can take steps in the early stages of their development to increase the likelihood that their efforts stand the test of time.

The term “sustainability” refers to a coalition's ability to continue to function until it has accomplished its goals. It also refers to a coalition's ability to ensure that its accomplishments have a lasting impact on the broader community, so that programmes continue to thrive, community attitudes continue to shift towards tolerance and policy gains are not reversed.

Bear in mind that sustainability is not always the best goal for a coalition. In cases where there is a clear and distinct task for coalition partners to accomplish – such as writing a report, hosting a major event or developing and supporting a particular policy or law – creating a temporary coalition with a clear end date could be the most appropriate course of action. Once a coalition has successfully accomplished a shared goal and then disbanded, former coalition members may be more likely to collaborate in the future.

This chapter will review strategies for coalitions to plan for sustainability while addressing some of the most common challenges to long-term success, including conflict, member retention and leadership development.

Challenge 1: Dealing with conflict

Conflict is a normal and even healthy part of any coalition's development. It can be stressful for all involved, but sometimes that stress can be reduced simply by acknowledging that conflicts are to be expected and by proactively discussing issues with the group. In the long-term, facing conflicts directly can lead to greater understanding among coalition members and to changes that are beneficial to the coalition's work.

The following are some recommendations to help address challenging interpersonal dynamics in a proactive and solution-oriented manner.⁶

Look for win-win solutions. Groups will often assume that their different needs are incompatible and that they have to compete. By taking a step back, they may find ways forward that address everyone's needs. It is worthwhile to bear in mind that the coalition has come together to promote tolerance, and that the first step in promoting tolerance is to ensure that the coalition itself embodies this value.

⁶ These recommendations have been adapted from the Seeds for Change guide to managing conflicts: <https://www.seedsforchange.org.uk/effectivegroups#conflict>.

Listen carefully to what other people are saying. Tension and anger can make it harder for individuals to understand something from someone else's perspective, and even to understand their own feelings clearly. When a coalition brings together people from different cultures and religions, conflicts may arise based on unrecognized biases or misunderstandings. It can be helpful to ask members of the group to find another way to state their opinions if it seems that they are being misunderstood.

Try to make sure everyone gets a fair hearing. It is common for a person's communication style to impact the support they get from the group. If people face language, ability or cultural barriers that make it harder for them to speak up in a group, meeting facilitators need to ensure that they have an opportunity to be heard. Gender dynamics can also influence who is heard and who is not. If men interrupt women or dismiss their viewpoints, it is a good idea to discuss this issue with the group and remind them of the ground rules established for the coalition.

Are there underlying reasons why conflict has flared up over a particular issue? If tempers are running high over what seems like a minor issue, consider whether the group is getting so heated because of a wider pattern, such as particular relationships within the group or in wider society. For example, if ideas from one group are routinely given less consideration than others, the content of a particular disagreement may be less important than the fact that the speaker has repeatedly felt unheard. This dynamic may also surface between members of a dominant culture and those who are seen as "outside" that culture, such as Roma, religious minorities or LGBTI people. Such dynamics signal that the coalition has more work to do internally before it will be able to represent a consistent voice for non-discrimination in the wider world.

Where possible, address issues early before too many negative feelings have built up. This can help facilitate communication within the group. Some groups agree on a process for resolving conflicts in advance. Once trust has broken down, it can be hard to establish how to resolve the conflict fairly.

Challenge 2: Member retention

The importance of ongoing recruitment in developing a coalition has already been mentioned. In addition, it is critical to think about how the coalition will retain its current membership.

People first join a coalition because they support its purpose. They stay involved because they think it is a good use of their time and because they develop a feeling of commitment to their fellow coalition members. If the coalition is not making progress towards its goals, if personal relationships are not forged or if people find that meetings are tense, boring or not an efficient use of their time then they will eventually leave.

Be intentional about building a sense of camaraderie among group members. Make sure members have an opportunity to get to know each other better, both during

meetings and in a more social setting. Find opportunities to celebrate with the group and to recognize the milestones and accomplishments of individual members.

This is where the **six Rs of Retention** come in. It is a good idea to periodically assess how well the coalition is performing in each of these areas.

1. **Recognition:** Do members receive recognition from the coalition for their leadership in serving the coalition?
2. **Respect:** Does the coalition respect its members and their values and culture? Does it show that respect by arranging evening meetings and providing food, child care and other support?
3. **Role:** Does the coalition provide all members with important roles, including both men and women? Do these roles reflect the unique contribution that each member can make?
4. **Relationships:** Does the coalition personally invite new members? Does it give all members opportunities to make new friends and to broaden their base of support and/or influence?
5. **Reward:** Do the rewards for membership outweigh the costs? Bear in mind that not everyone is looking for the same kinds of rewards.
6. **Results:** Does the coalition's work yield results? Are these results obvious enough that members are encouraged to stay?

Example: Hungary's Working Group Against Hate Crimes has a three-month provisional period for new members wishing to join the coalition. During this time, organizations participate in the group's work but not in decision-making. If they demonstrate their commitment and meet the expectations for member organizations, they are invited to become full, voting members.

There are a few strategies to address this challenge:

- Members should agree in advance on expectations regarding meeting participation and not to question decisions that have been made according to the coalition's agreed-upon procedures. If a member does not meet participation standards, the coalition co-ordinator or a member organization should ask whether they intend to stay in the coalition and remind them about the expectations.
- When circulating the agenda for an upcoming meeting, the coalition co-ordinator should ask members to notify them if someone will be attending the meeting for the first time. A coalition member can then speak with that person before the meeting to explain what is to be discussed and the goals of the meeting. If multiple people are attending for the first time, then it may be beneficial to offer a coalition orientation session for those people prior to the official meeting.

Challenge 3: Leadership development

Another important element in sustaining coalitions involves continually developing leadership within the group. A focus on leadership development protects against burn-out by spreading responsibilities and ensures that the coalition will not fall apart when one member leaves. It also enables the rotation of leadership roles within the coalition, thus promoting the view of equality and avoiding dominance by any one member or group.

The following are some steps the coalition can take to incorporate leadership development into its ongoing work:

Define leadership opportunities: Identify a range of ways in which individual members can exercise leadership within the coalition. This may include the roles of working group co-chair, meeting facilitator, spokesperson and programme co-ordinator, among others. Take the time to clearly define the responsibilities of each position so that members clearly understand what they are being asked to accomplish.

Identify potential leaders: Coalition conveners and leaders should strive to have one-on-one conversations with all coalition members to talk about how they would like to develop their leadership within the coalition. Ask what they would need to succeed in a leadership role (for example mentorship, training or support) and work with them on a plan. Note that even coalitions without a centralized leadership structure need to identify and prepare members to take on increasingly responsible roles if the coalition wishes to stay active and effective over time.

Address social and cultural barriers: Some people are not given the opportunity to fully develop their leadership abilities because of society's views towards people of their, for example, disability, ethnicity, gender identity, nationality, race, religion, sex, or sexual orientation. Every coalition, and in particular those formed to address issues related to tolerance and non-discrimination, should make sure that each community has an equal opportunity to act in leadership roles and receives the support they need to succeed.

Develop a structure to facilitate shared leadership: The coalition should be structured in a way that supports its leadership development goals. This could, for example, include having deputy chairpersons for each of the working groups and for the coalition as a whole. Deputy chairpersons provide leadership support while in the role, and can then be promoted to the role of chairperson after a year of preparation and learning from their predecessor. The coalition may also agree to a structure that includes rotating leadership, in which each member organization has an opportunity to rotate into key roles or to be represented on the steering committee for a certain period of time.

Planning for sustainability

The planning process outlined below attempts to bring some order to the coalition's approach to sustainability. In fact, it is likely that many of these questions will have been answered during the coalition planning meeting described in Chapter 5.

The four steps of the sustainability planning process (see the tools in Appendix 2):

1. What is the coalition about?

- What are its foundations: mission, vision, goals, objectives, activities and skills?
- What needs does it address? What evidence is there that these are real needs?
- Is there any evaluation data available regarding the coalition's work in meeting these needs?

2. Develop a shared understanding of sustainability: Where does the coalition want to go?

- What is its vision? What kind of legacy does it want to create?
- What is the ultimate goal that it wants to achieve?
- What immediate and intermediate changes does it expect to bring about?
- What resources does it need?

3. What aspects of the coalition's work should be continued?

While this question will not be a part of initial planning, it is a question that the coalition should re-visit during subsequent planning sessions. The following questions can assist the coalition in deciding its future direction.

- How does the coalition spend its time and its money? What are its activities?
- What are the measurable results it wants to achieve? These can include changes in social norms and relationships, or changes to policies, practices and programmes.
- What role does the coalition serve in society now and what role should it have in the future? Is it a monitor of successes, a catalyst for change, a convener, a problem solver?
- Does the coalition itself need to be maintained? Are there others who could fill these roles more effectively?

It is a good idea to develop criteria to decide which programme components are worth sustaining. Criteria can include:

- Is the programme component having an impact and do the results justify continuing?
- What are the costs and benefits?
- Is there still a need and/or strong community support for meeting this need?
- Are there sources of potential funding?

Once areas of continued work are identified, the coalition can decide which activities should be prioritized. It should also answer the following questions:

- Should the coalition continue to be responsible for these activities, or can they be conducted by others?
- Which skills does the coalition need to develop to undertake these activities?
- What is the future of the coalition?

Approaches to sustainability

There are four general approaches to sustainability that the coalition may consider: *policy change*, *institutionalization*, *community ownership* and *finding resources*. Note that these approaches are not mutually exclusive. The coalition should discuss what combination of these approaches is best suited to the goals it seeks to accomplish.

1. Policy change:

Bringing about changes to the legal framework is one of the main reasons to form a coalition and is an effective way for a coalition to sustain the impact of its work. Through advocacy and social change mechanisms, programmes can continue to have an impact long after the coalition has ended. When policy change is the sustainability strategy, the coalition works to **advocate for policy change** and to **train the community and its constituents** to become effective advocates for policy change.

Coalitions can target either large-scale government policies at the national, regional or district levels, or more localized policies (for example, school policies on how hate crime incidents are handled or agreements between local police departments and human rights monitoring groups). One example of a long-term policy change that a coalition can bring about through its advocacy initiatives is the passage of comprehensive hate crime legislation that includes the proper identification, recording and reporting by police and other authorities of bias-motivated incidents.

Example: In the United States, the Leadership Conference on Civil and Human Rights (an umbrella organization for civil rights and labour groups) led a large coalition, co-chaired by the Anti-Defamation League (ADL) and the Human Rights Campaign, that spearheaded the passage of a historic hate crime law in 2009. Since then, the ADL has reconvened many members of the coalition to defend the federal law and to join

a “50 States Against Hate” initiative aimed at passing strong laws against hate crimes in all 50 states.

Coalitions considering policy change as both a sustainability strategy and a means to accomplish its primary goals may ask the following questions:

- What policies will help realize the coalition’s goals? Consider both broad policies (such as legislation, funding policies, regulations and ordinances at the national, regional and district levels) and local policies (such as protocols, memorandums of understanding and rules and practices at the local or institutional level).
- What must be done to achieve these policy changes?
- What will the coalition do to build the capacity of its community to advocate for policy change? Does the coalition have the resources to undertake advocacy or to train residents in policy change and advocacy?

For advice on developing and passing a policy agenda, see Appendix 1 for links to helpful tools from Planning to Win and Wellstone.

2. Institutionalization:

Institutionalization involves developing tolerance and non-discrimination programmes that are then adopted and owned by other institutions or associations. In line with this approach, the coalition may plan and support programmes that can ultimately be incorporated into existing institutions, including schools, community centres or other organizations and agencies. Alternatively, the coalition may develop resources, such as on conducting interfaith dialogues, and then share these resources with government agencies working to address discrimination.

Once a coalition has developed to the point that it is considering institutionalizing certain programmes, the following questions should be considered:

- Which programmes could be incorporated into other institutions?
- Which organizations in the community could adopt them?
- What expertise will these organizations need to develop to successfully implement the programmes?
- How will the coalition engage these institutions? How will it help them develop the needed expertise?

What are the long-term implications for the coalition in sharing its programmes? For example, does the programme provide a significant portion of the coalition’s income? Are there coalition members who would likely lose interest in the coalition without this programme? Is the programme closely tied to the coalition’s reputation and public image?

Example: In *Forgotten Women* – a temporary project of the European Network Against Racism (ENAR) to address Islamophobia targeting Muslim women – the coalition found a variety of ways to sustain the progress and momentum that the project had created. The project resulted in new connections and collaborations between anti-racist and mainstream feminist organizations. For example, in Ghent, Belgium, a network of feminist organizations campaigned against a prohibition on the wearing of headscarves in municipality offices, collecting 10,000 signatures. Subsequently, the municipality decided to cancel the prohibition and let Muslim women wear the headscarf at work. As a result of relationships built through the *Forgotten Women* project, ENAR was able to persuade the European Coalition to End Violence against Women and Girls (VAWG) to recognize hate crimes as a specific form of violence against women.

3. Building community ownership:

In this third approach to sustainability, communities claim ownership for the coalition's activities.

When the coalition's work is part of a broader development and empowerment strategy, then its goal is to mobilize community members who will continue these efforts. In this scenario, groups that are not part of the coalition can still take responsibility for organizing local responses to acts of intolerance or hate for example.

Another variation of this strategy is to change prevailing norms. For example, an effective social marketing campaign can influence the attitudes and behaviours of broad segments of society in the long term. More information on how to plan a social marketing campaign can be found in Chapter 45 of the *Community Tool Box* (<https://ctb.ku.edu/en/table-of-contents/sustain/social-marketing/conduct-campaign/main>).

Example: Several of the most active members of the coalition *Kontaktkreis Fluechtlinge* (Contact Circle Refugees) launched an independent project, the *Integrationswerkstatt Unkel* (Integration Workshop-Unkel) to support refugees' integration in the German town of Unkel. In order to ensure that the interests of the target community were addressed, the project leaders decided that the effort should be led by refugees, who make up at least half of the project's board and half its members. Longer-term residents are also involved in the project, but project leaders believe that without the leadership of refugees the project would be unsustainable.

A coalition that plans to build community ownership and change prevailing norms should address the following questions:

- Which of the coalition's activities could be transferred to others' ownership?
- How has the coalition mobilized residents who are committed to sustaining activities?
- How can the coalition engage and change the media?

4. Finding resources to sustain the effort

One benefit of coalitions is that they allow organizations with limited resources to band together, creating a whole that is often greater than the sum of its parts. Nonetheless, most coalitions require some financing to operate sustainably and to implement joint programmes. In general, members need to discuss and agree on strategies to fund the coalition's activities. Initially, the coalition may be able to rely only on time and other resources contributed by coalition partners. However, as the coalition grows and its work becomes more complex, it may require independent funding sources. Some coalitions receive funding from foundations or government agencies, some collect dues (or in-kind resources) from members and others receive fees for services performed. Coalition members will likely have experience in funding their own organizations and will have ideas about ways to increase the coalition's financial capacity without competing with member organizations for those funds.

Finding additional resources to support coalition efforts is the most common approach to sustainability and may be combined with any of the other sustainability strategies.

Example: The Working Group Against Hate Crimes in Hungary is an informal coalition with no budget and no central staff. The coalition relies on voluntary contributions from members to work on behalf of the coalition and to share programme costs. This has worked because the leaderships of participating organizations are willing to devote time and resources to what they agree is important. They are now considering formalizing the coalition in order to receive funding that individual members may be unable to access.

The advantage of this approach is that the coalition can continue to fund the staff positions and programmes it has created. The peril is that identifying new funding sources is often seen as the only approach to ensuring sustainability, and does not allow for other strategies that might involve broader ownership of both the issue and the long-term solution. Many excellent programmes face severe funding shortages, making it imperative that coalitions do not focus their efforts exclusively on finding new funding.

Example: Connecting Actions formed as an initiative of the Muslim Jewish Conference (MJC) in 2015. Through that initiative, three organizations – Coexister, 3 Faiths Forum and the European Union of Jewish Students – came together to think of the best way to institutionalize work to promote citizen dialogue. They agreed to identify and recruit a larger number of organizations working in the field. In November 2016, the first symposium took place in Paris, and inter-organizational discussions were held on the identity and shape of a future Coalition of European Actors for Citizen Dialogue. Connecting Actions then formed an independent civil society organization in order to apply for funding that would allow them to build on and sustain the coalition's work.

Coalitions seeking funding to sustain their efforts should consider the following:

- What resources are needed to maintain the coalition’s activities?
- Which activities require additional financial resources?
- Where and how can the coalition find this funding?
- What resources are available and how can they be accessed?

More information on how coalitions can plan for sustainability, with a focus on financial sustainability, can be found in Chapter 46 of the Community Tool Box.

Example: The Coalition Against Hate is a non-registered network with no centralized administration that relies on partners to support each other and the broader coalition. Due to a lack of funding, the Coalition Against Hate’s online presence has dissolved from a multifaceted website with multiple forums for human rights advocates into a more limited website for Russian-speaking audiences and social media accounts. This reliance on social media has hindered the flow of communication among coalition partners. One of the coalition’s founding organizations is now seeking to launch International Religious Freedom (IRF) roundtables in Ukraine, Belarus, Russia and Kazakhstan, with the aim of spreading and sustaining the coalition’s work.

Recognize that the coalition will face challenges

Even with an excellent coalition plan and dedicated partners, the coalition will sometimes face challenges. These may cause members to doubt whether the coalition can be sustained over time, and whether it is worth the effort.

Generally, the sooner challenges are identified and addressed, the easier it will be to find a productive way forward. Appendix 2 contains a troubleshooting guide from Coalitions Work that can help identify solutions to the problems the coalition is experiencing.

Remember: Sustainability is not always the right choice

“Our coalition would be more sustainable if we could bring in groups working on different issues – such as those representing LGBTI rights, different religious groups and nationalities – but some of our members are opposed to the idea. They argue that those groups don’t understand or care about our issues. For this reason, we have decided that the coalition will only work together on one report and then disband. – *Anonymous coalition leader.*”

In some cases, it makes sense for a coalition to form around a temporary objective and to disband once that objective has been accomplished. A temporary coalition may be the best approach where there is a specific need, such as the passage of legislation, or for groups that do not have a history of working together. Knowing that the coalition is temporary may help to avoid unnecessary pressures on the group. It is also often

easier for individual members to commit resources when the coalition's expectations and needs are finite. A temporary coalition may help to build trust and increase the likelihood of a successful longer-term collaboration in the future.

The coalition may at some point need to consider whether it is worth continuing its efforts to sustain an ongoing coalition. Guidance provided in Chapter 1 on the conditions necessary to form a successful coalition can also be applied to help decide whether changing conditions mean that the coalition is no longer likely to succeed.

There can be many reasons why an ongoing coalition might consider disbanding. Perhaps only a few members are doing all of the work. Perhaps relationships between partners have dissolved to the point where they can no longer work productively together. Perhaps key members have left the coalition, reducing its potential power and influence. If so, it may be necessary to discuss how best to dissolve the group.

Chapter 7

Tracking and Evaluation

The most effective coalitions continually assess their progress, look for lessons learned from past experiences, adjust their plans to reflect current progress and seek ways to function more effectively.

This chapter looks at systems that can help coalitions to effectively capture and analyse information in order to understand the impact the coalition is making and to adjust its efforts accordingly.

The importance of tracking and evaluation

After dedicating considerable time and energy to forming a coalition and developing a plan, coalitions often dismiss the importance of ongoing evaluation. The following are steps the coalition can take to properly incorporate tracking and evaluation into its coalition plan and timeline.

- **Make the plan work:** Set measurable benchmarks within the plan and periodically check the coalition's progress. By tracking the right information, the coalition can determine whether or not it needs to adjust its strategies.
- **Fine-tune the coalition:** Conduct a regular coalition assessment (described below) in order to identify how the coalition can work better as a group and to improve its efforts to recruit and retain members.
- **Improve coalition programmes:** Ask participants in programmes, conferences and events developed by the coalition to complete an evaluation form.
- **Demonstrate accomplishments:** By tracking the right data, the coalition will be able to point to concrete improvements on the issue it works on. Such data could include changes in attitudes over time or trends in reported bias-motivated incidents since the coalition launched an intervention. The coalition can also report activity-related data, such as the number of events sponsored, the number of letters sent to policymakers, or the number of media mentions of the coalition and/or its issue.
- **Attract funders/resources:** A coalition that can demonstrate accomplishments can also make the case that it deserves financial support.
- **Know when to celebrate:** Tracking the coalition's progress means that members will know when it has reached a key benchmark. Celebrating these milestones adds to a coalition's sense of shared accomplishment and gives members more energy to continue their work.

“People are motivated when they see the results of their efforts. When they see changes in legislation or in police practice; when promises are made and delivered on: that makes people feel good about their participation.” – *Tamás Dombos, Working Group Against Hate Crimes, Hungary.*

Evaluation Models

There are many different aspects of a coalition's work and its general effectiveness that should be tracked and evaluated. This section provides a few suggested methods. More detailed information on developing a monitoring and evaluation (M&E) plan and downloadable templates can be found at: <http://www.tools4dev.org/resources/me-framework-template/>.

What to track and evaluate

In assessing the coalition's effectiveness, the key question to consider is how the coalition is progressing towards its agreed goals. The following are five measures by which a coalition's progress can be evaluated, together with questions for each.

- **Coalition organization:** How has the coalition developed its organizational capacity? Does the coalition have a vision and a plan? Does the coalition's membership include all major stakeholders?
- **Action on the identified issues:** Has the coalition identified measurable and targeted action steps? Is the coalition undertaking activities to achieve its goals? Will these action steps help the coalition achieve its goals and meet its objectives?
- **Intermediate outcomes:** Is the coalition working to bring about changes to programmes, policies and practices? Have participating organizations and communities changed their own programmes, policies and practices to meet the coalition's goals? Such intermediary outcomes can predict broader, societal-level change.
- **Coalition impact:** How widespread is the change created by the coalition's work? What is the scope of these changes and what do they look like? Are changes happening in many sectors and systems?
- **Legal and policy change:** Has the coalition succeeded in passing its policy agenda? Has it achieved legal victories that will set precedents or change practices? Has it set the stage for further legislative or regulatory victories to come?

How to track and evaluate

There are two general types of evaluation that a coalition should undertake. The first is subjective, and relates to how the coalition members themselves feel about the internal operation of the coalition, whether stakeholders have a sense that "things are changing", and whether those outside the coalition generally view it in a positive light. This type of evaluation is most relevant for coalitions that intend to collaborate over a longer period of time, rather than for a single effort. The second is more objective and can be done using the measurable benchmarks set during the coalition's planning session discussed earlier.

Tracking the coalition’s progress does not have to be complicated or expensive. There are many free or low-cost tools that allow coalitions to share information among partners and maintain clear documentation.⁷

Assessing coalition health (subjective evaluation)

At least once a year, every coalition member should be asked to complete an assessment of the coalition as a whole. Appendix 2 contains a template for a coalition member assessment. This survey should be adapted to fit the specific characteristics and structure of the coalition, including important issues it works on and the needs of the communities it serves.

After aggregating the results of the assessment, the entire coalition should review the results and discuss what it needs to adjust in order to strengthen any weak areas. These results, and the following discussion, can then be used along with the objective tracking evaluation (below) as part of the coalition’s next planning session.

Systems for tracking (objective evaluation)

Track the coalition’s plan: Once it has finalized its plan, the coalition can go through the plan and identify every measurable benchmark. A spreadsheet or database can be used to note what is being measured and the coalition’s target. The spreadsheet can be updated each month to reflect ongoing progress, so that the coalition’s growth can be tracked over time. In the example below, coalition partners can see that they need to plan two more community dialogues before the end of the year in order to meet their goals. The spreadsheet might also trigger questions within the coalition about any shortfalls in its strategy (such as the absence of specific policy change) and whether the strategy needs to be adjusted.

| <i>Goal 1, Objective 1: Hold meetings with members of parliament to discuss hate crime legislation</i> | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug |
|--|-----|-----|-----|-----|-----|-----|-----|-----|
| Number of meetings held: | 0 | 1 | 2 | 2 | 1 | 0 | 0 | 0 |

A Google spreadsheet can be developed and shared with the group to allow all partners to monitor the coalition’s progress. It is a good idea to limit the number of people who can edit the data in order to avoid confusion or duplicate entries.

Track the coalition’s assessments: After the coalition’s self-assessment has been completed, maintain the results in another shared spreadsheet or database. This will allow the coalition to track its progress and trends from year to year, enriching its discussions as time goes by.

⁷ Some examples include Google Drive, Slack and Basecamp.

Community check box: The Community Tool Box offers a more customized coalition tracking system called the Community Check Box, in which groups can document new programmes, policies and practices, along with the community and systems changes that result from the coalition's efforts.

This model looks at changes to *programmes, policies and practices*. These elements, referred to as intermediary changes, can demonstrate progress towards longer-term goals, such as creating a safer and more tolerant society and reducing discrimination.

Take, for example, a coalition looking to reduce discriminatory practices in a given community. Before the coalition can observe measurable changes in people's actual behaviours and attitudes, it will be able to identify activities and benchmarks that pave the way for those changes. These could include the number of training sessions held for employers and civic groups on tolerance and non-discrimination, classes delivered in schools, policies passed that prohibit discriminatory treatment in workplaces, and practices advanced to promote tolerance in the public sphere. The coalition can also document behavioural changes and practices that reflect increased tolerance in multiple settings, including schools, workplaces and in entertainment.

Conclusion

It Can Be Done

Reading through this guide for the first time, someone looking to start a coalition may well feel overwhelmed by the task at hand. Building a coalition to create real change in communities is no small feat, but it can be done.

This guide contains three key points:

- ▶ 1) Coalitions can make a difference in creating more tolerant and just societies.
- ▶ 2) Coalitions should be a model for the world they seek to create. This means that they should be actively inclusive, non-discriminatory and collaborative.
- ▶ 3) A coalition is a web of relationships. It is important that those creating a coalition get to know coalition members as people and understand their histories and struggles. This will not only strengthen the coalition's work, but will give it more meaning. It will also increase members' sense of shared commitment to each other and to the changes they are jointly creating.

The rest of the guide provides practical advice and tools to help coalitions move towards their goals. Each section can be returned to when they become relevant to the coalition's stage of development.

It is important to note that this guide is not the only resource or source of support on this subject. Appendix 1 lists websites that offer additional tools and guidance as the coalition moves forward. The coalition should also turn to experts in the immediate community, as well as to the increasing number of partners that the coalition will work and build connections with in different locations. After all, sharing the knowledge and efforts of partners and everyone in the community is what coalition building is all about.

Appendix I: Resources

Resources for creating and planning a coalition:

Coalitions Work: Contains resources and tools for coalitions: <http://coalitionswork.com/resources/tools/>.

Community Tool Box: Contains information on creating a coalition: <http://ctb.ku.edu/en/table-of-contents/assessment/promotion-strategies/start-a-coalition/main>.

Nonprofit Tech for Good: Provides resources and updates on trends related to technology, social media and fundraising: <http://www.nptechforgood.com/>.

Planning to Win: The Just Enough Guide for Campaigners: Offers a campaign planning tool, models for coalition structure, creative tactics, evaluation tools and more: <https://planningtowin.org/>

Seeds for Change: Contains resources on consensus building, facilitation and skills for working in groups: <https://www.seedsforchange.org.uk/resources>.

tools4dev: Contains downloadable templates and guidance for monitoring and evaluation (M&E), stakeholder analysis, strategic planning, fundraising and more: <http://www.tools4dev.org/category/skills/>.

Wellstone: Provides tools for organizing, policy advocacy, planning, using technology and strategic communications: <https://www.wellstone.org/resources>.

Resources for addressing discrimination and intolerance:

OSCE/ODIHR: Provides reports and materials on tolerance and non-discrimination: <http://www.osce.org/odihr/tolerance-and-non-discrimination>.

Anti-Defamation League: Presents research results, anti-bias education materials and toolkits: <https://www.adl.org/education-and-resources/resource-knowledge-base>.

The Association for Women's Rights in Development (AWID): Provides resources on feminism, including a toolkit on Co-Creating Fearless Futures: <https://www.awid.org/resources>.

European Network Against Racism (ENAR): Contains reports and publications: <http://www.enar-eu.org/Publications>.

Southern Poverty Law Center:

- *A Guide to Bystander Intervention*: Provides advice on what to do when faced with public acts of harassment or hate-based violence: <https://www.splcenter.org/20171005/splc-campus-guide-bystander-intervention>.
- *Ten Ways to Fight Hate: A Community Response Guide*: <https://www.splcenter.org/20170814/ten-ways-fight-hate-community-response-guide>.

Three Faiths Forum: Provides resources for teachers and for those running interfaith dialogues and events: <http://www.3ff.org.uk/resources/>.

UNESCO: Contains materials on promoting tolerance: <http://www.unesco.org/new/en/social-and-human-sciences/themes/fight-against-discrimination/promoting-tolerance/>.

Appendix 2: Tools

Tools for Chapter 2: Building a coalition

Stakeholder Analysis

Stakeholder definition: “Stakeholders” are those who have a stake in the outcome of the coalition’s work. This will include those who are directly impacted by the issues that the coalition seeks to address, individuals and organizations that are currently involved with efforts to address these issues, opinion leaders (people who shape others’ understanding of an issue), and those whose lives or work may be affected by the coalition’s efforts. When developing a recruitment plan, focus on identifying stakeholders whose interests align with those of the coalition.

To perform a stakeholder analysis, list the stakeholders at the top of each column and answer the questions contained in each row of the first column.

| Stakeholder analysis questions: | Stakeholders | | |
|--|---------------|---------------|---------------|
| | Stakeholder 1 | Stakeholder 2 | Stakeholder 3 |
| What skills, capacities, and or/resources would the stakeholder bring to the coalition? Knowing this can help the coalition identify those stakeholders with the most to offer. | | | |
| What is their potential role within the coalition? <i>This allows the coalition to define what stakeholders might contribute to the group’s efforts.</i> | | | |

| Stakeholder analysis questions: | Stakeholders | | |
|--|----------------------|----------------------|----------------------|
| | Stakeholder 1 | Stakeholder 2 | Stakeholder 3 |
| <p>What is their self-interest? Why would they join?</p> <p><i>Consider why they would benefit from being a member of the coalition, and use that information to encourage them to join.</i></p> | | | |
| <p>How will you recruit them?</p> | | | |
| <p>What barriers might exist to recruiting them?</p> | | | |
| <p>Who will approach them and when?</p> <p><i>In addressing the question of when, prioritize those who have the most to offer the coalition and those with the greatest self-interest in the coalition's work.</i></p> | | | |

Tools for Chapter 3: The Coalition Start-Up Meeting

1) *Sample agenda for a coalition start-up meeting:*

This agenda can be adapted based on the length of the meeting, participants' familiarity with each other, their past experiences of working together and the specific needs of the coalition. If there is limited time for the meeting, it is better to attempt to accomplish less rather than trying to move through everything more quickly. It is important to remember that groups that have not previously worked together need more time for discussions than those that have collaborated before. If the meeting lasts more than two hours, then make sure to schedule adequate time for breaks in the agenda.

Remember to circulate the agenda among participants in advance of the meeting.

Sample Agenda

| | |
|------------|---|
| 15 minutes | Welcome, review meeting purpose and agenda |
| 10 minutes | Introductions |
| 10 minutes | Purpose of the coalition: <i>Present initial thoughts on the scope of the coalition that the group hopes to mobilize and the issues it will address. Note that this may change over the course of the meeting. Ask if anyone has preliminary questions or feedback.</i> |
| 5 minutes | Ground rules (see Chapter 3) |
| 10 minutes | Small group icebreaker (see Chapter 3) |
| 10 minutes | Moving debate (see below) |
| 60 minutes | Issues mapping (adjust the questions below based on the coalition's specific focus): <i>Of the issues that the coalition seeks to address, what are the most pressing issues facing the community?</i> <i>What are the context, history and community climate of the issues identified by the group?</i> <i>What are the root causes of these issues?</i> <i>What is currently being done to address this issue?</i> <i>Where are there gaps in current efforts?</i> <i>Why is building a coalition a helpful approach to addressing these issues? What is it that the coalition can do together that members could not accomplish independently?</i> |
| 20 minutes | Coalition values: <i>What are the values that members share that should guide the work of the coalition?</i> |

- 30-45 minutes Coalition vision (see below):
Small group visioning exercise
Full group discussion to build a shared vision
- 30-45 minutes Coalition purpose and goals:
The purpose of this session is to establish preliminary agreement on the coalition's purpose. A planning meeting should be scheduled shortly after the start-up meeting to more fully develop the coalition's goals and objectives.
Based on the issues map, what are the most immediate needs that can be addressed by the coalition?
How can the coalition put its values into action and move towards its vision?
What other issues are important and closely related to the coalition's purpose?
- 30-45 minutes Coalition Membership:
Based on the coalition's goals and issues map, who else should be part of this coalition? Who should approach them?
Should the coalition establish any criteria or requirements for coalition membership? Is it prepared to work with anyone in order to move towards its goal or are there groups or individuals that it will not work with? Why/why not?
- 30 minutes Next Steps, responsibilities and timeline:
Who will do what and by when? How will coalition members share responsibilities and hold each other accountable?
- 15 minutes Closing exercise (see Chapter 3)

2) *The spectogram exercise:*

A “spectogram” is a participatory exercise in which participants examine live questions and controversies related to the work of the coalition. The following provides guidance on how to facilitate the exercise:

Participants are asked a series of questions and must decide where they fall along a continuum of responses by physically locating themselves on an imaginary spectrum (the spectogram). They will then be asked to explain why they have placed themselves where they are.

There are no right or wrong answers. The exercise is meant to encourage participants to examine their own beliefs and strategies and to learn from others. Participants must place themselves along the spectrum even if the two ends do not seem to represent mutually exclusive situations.

During the exercise, participants are free to move to a new place along the spectrum after hearing others’ responses.

Develop two or three statements that seem relevant to the coalition or that allow participants to get to know each other better. Focus on scenarios where there is no clear-cut right or wrong answer. Possible examples include:

- Ask participants where they prefer to spend their vacations – in nature or in a new city. Those who prefer nature stand to the left of the room, and those who prefer travelling to a new city stand to the right. Participants who enjoy a degree of both can place themselves somewhere along the spectrum.
- “I am willing to work with anyone who shares the goal of creating a more equal society, even if we don’t share the same values on anything else”. Those who agree completely stand to the left, and those who disagree completely stand to the right. Participants place themselves somewhere along the spectrum depending on how closely the statement reflects their views.
- “Dialogue” means that there are no taboo topics. Those who agree completely stand to the left, and those who disagree completely stand to the right. Participants place themselves somewhere along the spectrum depending on how closely the statement reflects their views.
- Prejudice is a natural response that can be overcome through reason and understanding. Those who agree completely stand to the left, and those who disagree completely stand to the right. Participants place themselves somewhere along the spectrum depending on how closely the statement reflects their views.

After participants have placed themselves along the spectrum for each question, conduct quick interviews with three to five participants (depending on the time available). Ask one volunteer from both extremes and one from the middle. It is also worthwhile trying to talk to everyone by the end of the exercise, if possible. Start with questions

such as, “I see you have placed yourself to the left. So you believe that [insert statement]?” It can also be helpful to ask a follow-up question, restate the participant’s response and then push them a bit to explain their reasoning.

3) *Exercise to develop a shared vision*

The following exercise is adapted from one used by the Connecting Actions initiative when convening civil society representatives to build a coalition for intercultural and interreligious dialogue. The exercise consists of the following steps:

- Break participants into smaller groups (ideally between four and eight participants, depending on meeting size).
- Instruct the group to imagine that it is five years in the future. Ask them to imagine an ideal scenario in which everything has gone right for the coalition. What happened? What has the coalition accomplished and how? Then ask the group to imagine a disaster scenario. What happened and how?
- Give the smaller groups time to develop their scenarios, then bring the entire group together. Have each smaller group report on both scenarios, taking notes on the flipchart.
- Based on these scenarios, ask the group to identify key factors of success and potential challenges and threats that require attention (note that this is a variation of the SWOT analysis discussed in Chapter 5). Ask them the following questions:
 - ▶ *What seem to be the major and probable risks for the coalition?*
 - ▶ *What opportunities can it seize?*
 - ▶ *What factors enable or inhibit the coalition’s success? How can the group work to strengthen the enabling factors? How can it reduce the inhibiting factors?*
 - ▶ *Based on the ideal scenarios, can the group develop a vision statement to guide the coalition’s work? How would it describe the world the coalition is seeking to co-create?*

Tools for Chapter 4: Structure, Governance and Leadership

1) Template for establishing a coalition's operating principles

I. MISSION: *An effective mission statement contains a compelling description of the coalition's purpose and the strategies it will employ to accomplish it.*⁸

II. NAME: *What name should the coalition adopt to clearly communicate what it is trying to do?*

The coalition's name is the _____

III. STATUS AND LIMITATIONS: *What is the coalition's structure and intent?*

Example: In order to achieve its mission, this entity is organized as a voluntary coalition.

Members of the coalition will uphold the mission and abide by its operating principles.

IV. MEMBERSHIP: *Who is eligible to be a member of the coalition? What groups should be involved in order to successfully achieve its mission?*

Example: The coalition is led by its members. Members can include public, private and not-for-profit groups, and citizens, volunteers and educators. Membership is open to any organization and/or individual who subscribes and commits to the coalition's mission. Interested parties will be discussed, reviewed and approved by existing members.

Each member is permitted to have up to two representatives serving on the coalition.

V. ROLES AND RESPONSIBILITIES: *What is expected of coalition members?*

Example: Members are expected to: _____

- Regularly attend meetings, or send an appropriate delegate (no more than two representatives), and participate in working groups.

⁸ See, for example, Francis Pandolfi, "How to Create an Effective Non-Profit Mission Statement", Harvard Business Review, March 14, 2011, <https://hbr.org/2011/03/how-nonprofit-misuse-their-mis>.

- Actively collaborate on and help execute a strategic plan that includes strategy, key messages, measures of success and tactics.
- Receive and acknowledge all communications.
- Make decisions as a group.
- Serve as a spokesperson of the coalition when appropriate.
- Utilize, if appropriate, their separate organizational channels to help promote the mission of the coalition and to disseminate relevant information and tools.
- Allow their organization's name and logo to be referenced in coalition materials, if approved by the necessary parties of their organization.

VI. DECISION-MAKING PROCESS: How will the coalition make decisions?

Example: Whenever possible, decisions will be made by consensus, in order to encourage the opinions of everyone to be heard and discussed. The majority decision will be followed, provided there is no major objection.

VII ADMINISTRATION: How will the coalition stay organized and on-track? Who will organize and manage meetings, record minutes, etc.?

Example: The activities of the coalition will be administered by

Coalition working groups will meet monthly, or as needed, either through video-conference or teleconference. The coalition as a whole will meet in-person quarterly. An administrative team member will participate in every meeting to facilitate, record minutes and co-ordinate next steps and future plans.

VIII. COALITION FUNDING: How will the coalition's activities be funded? What are coalition members expected to contribute? Could coalition members be possible beneficiaries of coalition funds?

IX.EXTERNAL COMMUNICATIONS: What guidelines or review process should be established to ensure that external communications related to the coalition are consistent and approved by all members?

Example: Any communication referencing the coalition, its membership or its work, must be reviewed and approved collectively by all members.

2) *Operating principles example: the Civic Solidarity Platform*

Note that these operating principles are provided as an example of how one coalition chose to address these questions. Each coalition must decide on its operating principles based on its specific goals and how coalition members feel they can work together most effectively.

1. **Goals and principles of the platform:**

The Platform is a coalition of civic organizations and groups from OSCE participating States, as well as international NGOs interested in undertaking joint action to defend human rights in the OSCE region. Groups within the coalition are also prepared to reach common positions on key issues and, when needed, to provide each other with mutual support and assistance.

2. **Principles of participation and membership:**

Organizations and groups working in the OSCE region may participate in the Platform. Existing participants will determine the degree and form of prospective organizations' engagement in the work of the Platform.

There are two basic types of participation:

- a. **Informational participants:** These include groups that join the Platform by registering on its website or by writing to the Secretariat, and that provide basic contact information and pledge to accept the coalition's Declaration. These participants will receive access to the Platform's information resources, and will be invited to participate in its activities and to sign its statements. The **Secretariat** will be responsible for registering informational participants.
- b. **Members:** These are groups that take on additional responsibilities and that declare themselves accountable to the Declaration, as well as to other documents regulating the activities of the Platform and adopted in accordance with established procedures. These organizations are represented on the Platform's working groups and contribute to formulating the Platform's common positions. The status of member is granted by the Platform's Council, in accordance with member recruitment procedures developed for recruiting new members.

The Platform's initial members are its founding organizations.

3. **Working groups and other internal structures**

The Platform's members may form working groups and other internal structures to promote effective work on specific areas. The focus of working groups may be thematic, regional or interregional.

Proposals to form such structures must be submitted by a minimum of three coalition members from at least two countries.

A proposal to form a working group should include information on its goals and tasks, a list of initial participants from among coalition members, contact information for at least three members of the proposed working group, the name of the co-ordinator, and internal rules developed for the group. Working group proposals must be supported by no fewer than three members of the Council.

The Council registers working groups through an agreed procedure and publishes information about them on the Platform's website.

4. Administration and direction

The **Council of the Platform** is formed of representatives of the coalition's founding organizations. The Council is a collegial structure responsible for the overall direction of the Platform and for developing the Platform's policy. Membership in the Council may be expanded by appointing representatives of partner organizations that have international experience. Proposals to appoint new members must be made by at least three Council members, and will be considered adopted unless they are opposed by three or more Council members. Member organizations may recall their representatives to the Council at any time and replace them with new representatives by notifying the Platform's Secretariat.

The Council appoints members of the Secretariat and the editor(s) of the Platform's website.

The Council may also create other permanent and temporary bodies, define their competencies and the rules for their functioning.

The Council ensures that internal rules and procedures are followed, approves internal documents concerning the Platform's administration, resolves disputes and, in cases of disagreements, confirms new members to the Platform and the creation of new working groups.

The Council has the authority to exclude organizations from the membership of the Platform. Exclusions must be proposed by at least three Council members, and will be considered adopted unless they are opposed by three or more Council members.

The **Co-ordination Committee of the Platform** is an operational body composed of co-ordinators of the Platform's working groups and other internal structures. The Co-ordinator of the Secretariat is an *ex officio* member of the Co-ordination Committee. Working groups and other internal structures are responsible for appointing their own co-ordinators, who will also serve as members of the Co-ordination Committee. The Co-ordination Committee ensures the exchange of information between working groups, confirms amendments to the Platform's organizational

principles (in co-ordination with the Council), and co-ordinates the approval of other internal documents.

The functions of the **Secretariat** will be carried out by Platform members selected by the Council for a rotating one-year term. The Secretariat is responsible for the following: circulating documents and statements developed by the Platform's structures; organizing the regular meetings of the Council; arranging for remote voting by the members of the Council and Co-ordination Committee; assisting in the organization of meetings of other Platform structures; and performing other administrative functions.

5. Procedures for adopting documents and statements

Any of the Platform's structures may issue declarations independent of the rest of the coalition.

Statements issued by the Platform may be proposed by at least three Platform partners; all Platform participants will be invited to sign such statements and will have the right to refrain from doing so. If a statement is not supported by a majority of Council members then they may still be issued by the Platform but will only carry the signatures of the participants that support them.

Disputes arising over decisions or statements made by the Platform's internal structures shall be resolved by the Council.

6. Adoption and amendment of these principles

This document will be adopted in its initial form by the founding conference of the Platform. Amendments may be made by the Council, with the support of a qualifying majority (two thirds of the votes).

3) *The stages of the consensus process (developed by Seeds for Change)*⁹

The stages of the consensus process

A multitude of models for achieving consensus exist; some groups develop very detailed procedures, while others follow a more organic process. The following process outlines the stages that are common to most models. While it is not always necessary to go through a formal process for each and every decision the coalition makes, it is a good idea to regularly practice applying a model. A group's familiarity with the process can really help when it comes to making difficult or complex decisions.

This model will work well in groups of about 15 to 20 people. Larger groups may need to build in extra steps in order to ensure that everyone is able to participate fully. The

⁹ For a more detailed description of the consensus process and other tools for facilitating consensus in a group, see: <https://www.seedsforchange.org.uk/>.

section on *Consensus in large groups* (below) explains how this basic model can be adapted to work for groups of hundreds and even thousands of people.

Consensus Flowchart

Step 1: Introduce and clarify the issue(s) to be decided

Share relevant information. Work out what the key questions are.

Step 2: Explore the issue and look for ideas

1. Gather initial thoughts and reactions. What are the **issues** and **concerns**?
2. Collect **ideas** for resolving the concerns – write them down.
3. Have a **broad-ranging discussion** and debate the ideas:
 - What are the pros and cons?
 - Think about solutions to the concerns.
 - Eliminate some ideas, shortlist others.

Step 3: Look for emerging proposals

Is there one idea, or a series of ideas, that combine the best qualities of the ideas discussed? Develop a solution that everyone might agree on and create a proposal.

Step 4: Discuss, clarify and amend the proposal

Ensure that any remaining concerns are heard and that everyone has a chance to contribute.

Look for **amendments** that make the proposal even more acceptable to the group.

Step 5: Test for agreement

Have coalition members reached an agreement? Check for the following:

- ▶ **Blocks:** A fundamental disagreement with the proposal that cannot be resolved. Participants who block the proposal will want to develop a new one.
- ▶ **Stand asides:** When participants do not support the proposal but decide to let it pass without them.
- ▶ **Reservations:** When participants voice some reservations but are willing to support the proposal's adoption.

- ▶ **Agreement:** When participants support the proposal and are willing to help implement it.
- ▶ **Consensus:** No blocks, not too many stand asides or reservations? Active agreement? Then the group has reached a decision!

Step 6: Implement the decision

Establish the who, when and how. Define the various tasks, assign responsibilities and set deadlines, etc.

Tools for Chapter 5: Developing a Coalition Plan

1) Sample coalition plan template

See Chapter 5 for more details on how to use this worksheet. A coalition plan contains the following elements:

Goals: Goals translate the coalition’s mission and vision into concrete directions, defining what it will achieve by the end of the planning period. Goals represent the broader purpose of the coalition and, as such, should be developed to reflect each of its key functions.

Objectives: Objectives are the major accomplishments that the coalition seeks to achieve over time. Objectives differ from goals in that they are specific and measurable; they are the intermediary achievements that the coalition sets in order to realize its goals.

3) Strategies/Tactics: Strategies are the specific tasks the coalition will perform in order to achieve its objectives. Make sure that the coalition’s strategies are specific and lead logically to its objectives.

Plan for <Coalition Name> _____

<Dates of the Plan> _____

Adopted on <date> _____

The following coalition members participated in the development of this plan:

Coalition Purpose:

| | |
|----------------|---|
| Goal 1: | |
| | Objective 1: |
| | Objective 2: |
| | Objective 3: |
| | Strategy 1: Who will implement the strategy and by when? |
| | Strategy 2: Who will implement the strategy and by when? |
| | Strategy 3: Who will implement the strategy and by when? |
| Goal 2: | |
| | Objective 1: |
| | Objective 2: |
| | Objective 3: |
| | Strategy 1: Who will implement the strategy and by when? |
| | Strategy 2: Who will implement the strategy and by when? |
| | Strategy 3: Who will implement the strategy and by when? |

| | |
|----------------|---|
| Goal 3: | |
| | Objective 1: |
| | Objective 2: |
| | Objective 3: |
| | Strategy 1: Who will implement the strategy and by when? |
| | Strategy 2: Who will implement the strategy and by when? |
| | Strategy 3: Who will implement the strategy and by when? |

2) Passport to the future (*Tearless Logic Model*)¹⁰

- I. What is the purpose of the coalition?
- II. What needs is it addressing? How does it know what the needs are?
- III. What are its goals and the anticipated outcomes of its work?
 - a. What is the ultimate goal, or what would the coalition like to have achieved by a defined date?
 - b. What immediate and intermediate changes does the coalition expect to bring about?
 - c. What resources does the coalition need to achieve its goals?
- IV. How will the coalition realize its aims?
 - a. What is the coalition’s current plan?
 - b. What are its current and planned activities?
 - c. How will its activities lead to its goals and expected outcomes?
- V. How will the coalition evaluate its progress? What benchmarks will it apply?
 - a. How will the coalition when it has reached its goal? What will it look like?
 - b. What will happen when the coalition reaches its goal?

¹⁰ The Passport to the Future planning model has been adapted from material developed by the Self Help Network at Wichita State University.

3) *Working group action plan template*¹¹

COALITION ACTION PLAN [Year]

| OVERALL WORKING GROUP GOAL: | | | | | |
|----------------------------------|--------|--|--|----------|-----------|
| WORKING GROUP OBJECTIVES: | | | | | |
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| Obj. # | Action | Strategy/Key Steps (include timelines) | Defining Success (Specific outcomes, by when?) | Partners | Resources |
| | | | | | Barriers |
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |

¹¹ Developed by Coalitions Work, see: <http://coalitionswork.com/>.

Tools for Chapter 6: Sustainability

What to do when things go wrong¹²

| WHAT TO DO WHEN THINGS GO WRONG | | |
|---|--|---|
| SYMPTOMS | PROBLEM | SOLUTIONS |
| <ul style="list-style-type: none"> • Failure to plan • Failure to act • Delays • Frustration | Lack of focus or direction | <ul style="list-style-type: none"> • Clarify the coalition's vision, mission and goals • Develop an action plan • Monitor progress in implanting the action plan |
| <ul style="list-style-type: none"> • Past grievances surface • Unequal sharing of resources • Disruptive meetings • Hidden agendas • Lack of trust | Turf battles and competition | <ul style="list-style-type: none"> • Recommit to the coalition's vision for the community • Develop statements of the coalition's values • Prevent or openly address conflict • Promote face-to-face discussions to identify partners' concerns and needs • Use informal conciliation • Use third-party mediation |
| <ul style="list-style-type: none"> • Member and leader burnout • Unreasonable demands on staff • New members fail to engage in work • Frustration • Resignations occur • Imbalance of power among organizations | Unequal sharing of power, decision-making and responsibilities | <ul style="list-style-type: none"> • Develop written responsibilities and roles for staff, leaders and members • Create memorandums of understanding for all member organizations • Meet with CEO/Director of each organization yearly to clarify expectations • Review action steps at the end and start of meetings • Hold annual coalition retreat to train members on team building and delegation • Allow each organization one vote when adopting decisions, etc. |
| <ul style="list-style-type: none"> • Members are uniformed about meetings/events • Infighting erupts • Members and community do not see the results of their efforts | Ineffective Communication | <ul style="list-style-type: none"> • Promptly circulate minutes • Distribute monthly (electronic) newsletters and items for partners' newsletters • Develop and distribute a one-page organizational message • Hold an annual "state of the coalition" address to review progress and future plans |

12 Developed by Coalition Work, see: <http://coalitionswork.com/>.

WHAT TO DO WHEN THINGS GO WRONG

| SYMPTOMS | PROBLEM | SOLUTIONS |
|--|---|--|
| <ul style="list-style-type: none"> • Dominance by professionals • Some community sectors are not well represented • Coalition is not respected or known in community • Community groups do not support coalition and its work | Poor links to the community | <ul style="list-style-type: none"> • Conduct a gap analysis to ensure diverse representation • Engage in a serious recruitment campaign • Hold meetings and events in accessible, neutral sites • Speak about coalition opportunities at community events • Support activities of other community partners |
| <ul style="list-style-type: none"> • Ineffective working groups • Ineffective steering committee • Failure to develop, maintain or rotate leadership • Poor attendance • High “dropout” rate • Lack of ongoing training • Inadequate funding • Lack of results | Ineffective coalition structure or function | <ul style="list-style-type: none"> • Conduct strategic planning to realign mission and goals with the coalition’s structure and function • Develop an organization chart • Hold an annual retreat and orientation for leaders • Institute one- to two-year leader term limits and annual elections • Commit to effective meetings and reporting • Have veteran leaders and members mentor new ones • Establish resource development or steering committees to develop budget, resources and funds |
| <ul style="list-style-type: none"> • Poor or inconsistent attendance • Lack of follow through on tasks | Time and loyalty conflicts | <ul style="list-style-type: none"> • Use surveys and discussions to identify the best meeting times and fit between talents and tasks • Conduct an annual review of commitment letters • Where relevant, ask organizations to send new representatives with more time to offer coalition • Have Chairs follow up non-attenders and those who fail to finish tasks • Ensure meetings are able to be attended by people with child care responsibilities including breast-feeding mothers. |

WHAT TO DO WHEN THINGS GO WRONG

| SYMPTOMS | PROBLEM | SOLUTIONS |
|---|------------------|---|
| <ul style="list-style-type: none">• Coalition is not recognized by media or key community leaders• Coalition's grant or funding applications are unsuccessful• Recruiting members and leaders is difficult• Expected outcomes do not occur• Community problems are unresolved | Lack of outcomes | <ul style="list-style-type: none">• Develop a logic model, action plan and evaluation plan• Collect data and consistently monitor short, intermediate and long-term outcomes to hold partners accountable and help align efforts• Co-ordinate each partners' activities via an agreed upon action plan• Use one-page organizational message and social media to broadcast successes to the public, as well as current and prospective members and leaders• Contact foundations and funders to explore funding opportunities |

Tools for Chapter 7: Tracking and Evaluation

1) Coalition member assessment tool¹³

Ask coalition members to complete the following member assessment tool in order to determine the health of the coalition. Ideally, coalition member assessments should be conducted at least once a year.

For each item, please circle the number that best reflects the degree to which you agree with the statement about that aspect of the coalition.

| Vision: Planning, Implementation and Progress | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|--|--|-----------------------|---|---|--------------------------|---|
| 1. | The coalition has a clear vision and mission. | 1 | 2 | 3 | 4 | 5 |
| 2. | There is consistent follow-through on coalition activities. | 1 | 2 | 3 | 4 | 5 |
| 3. | The coalition conducts activities that are effective in helping it reach its goals. | 1 | 2 | 3 | 4 | 5 |
| 4. | The coalition has developed targeted action planning for community and systems change. | 1 | 2 | 3 | 4 | 5 |
| 5. | The coalition effectively reconciles differences among members. | 1 | 2 | 3 | 4 | 5 |
| 6. | The coalition engages in collaborative problem solving of shared problems, resulting in innovative solutions. | 1 | 2 | 3 | 4 | 5 |
| 7. | The coalition expands its available resources by having partners bring resources to the table or identify others with resources. | 1 | 2 | 3 | 4 | 5 |

| Leadership and Membership | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|----------------------------------|--|-----------------------|---|---|--------------------------|---|
| 8. | The coalition develops and supports leadership. | 1 | 2 | 3 | 4 | 5 |
| 9. | There are opportunities for all coalition members to take leadership roles, and members are encouraged to take them. | 1 | 2 | 3 | 4 | 5 |
| 10. | Leadership responsibilities are shared equitably among men and women, and across all groups in the coalition. | 1 | 2 | 3 | 4 | 5 |
| 11. | Administrative responsibilities are shared equitably among men and women, and across all groups in the coalition. | 1 | 2 | 3 | 4 | 5 |
| 11/ | The coalition creates greater ownership by engaging partners in joint ventures and projects. | 1 | 2 | 3 | 4 | 5 |
| 12. | The coalition has a broad membership that is appropriate to the issue it is addressing. | 1 | 2 | 3 | 4 | 5 |
| 13. | The coalition's membership is diverse. | 1 | 2 | 3 | 4 | 5 |
| 14. | Members display commitment and take on tasks. | 1 | 2 | 3 | 4 | 5 |

¹³ Adapted from materials developed by Tom Wolff and Associates. For more information, see: <https://www.tomwolff.com/index.php>.

| Structure | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|------------------|---|-----------------------|---|---|--------------------------|---|
| 15. | The coalition maintains regular meeting cycles. | 1 | 2 | 3 | 4 | 5 |
| 16. | The coalition has active working groups and committees. | 1 | 2 | 3 | 4 | 5 |
| 17. | Members receive meeting agendas in advance and minutes after meetings. | 1 | 2 | 3 | 4 | 5 |
| 18. | Meetings follow the agenda and the planned work is accomplished. | 1 | 2 | 3 | 4 | 5 |
| 19. | The coalition has a viable organization structure that functions competently. | 1 | 2 | 3 | 4 | 5 |

| Communications | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|-----------------------|---|-----------------------|---|---|--------------------------|---|
| 20. | Communication among members of the coalition is effective. | 1 | 2 | 3 | 4 | 5 |
| 21. | Communication between the coalition and the community associated with its chosen issues is effective. | 1 | 2 | 3 | 4 | 5 |
| 22. | Coalition members respectfully and productively work through differences. | 1 | 2 | 3 | 4 | 5 |
| 22. | All coalition members are listened to and heard, regardless of gender. | 1 | 2 | 3 | 4 | 5 |

| Activities | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|-------------------|--|-----------------------|---|---|--------------------------|---|
| 23. | Information gets exchanged at coalition meetings. | 1 | 2 | 3 | 4 | 5 |
| 24. | The coalition develops new materials and new programmes. | 1 | 2 | 3 | 4 | 5 |
| 25. | The coalition advocates for change. | 1 | 2 | 3 | 4 | 5 |
| 26. | The coalition facilitates the sharing of new perspectives on issues. | 1 | 2 | 3 | 4 | 5 |
| 27. | The outcomes are more comprehensive than those that could be achieved without the coalition. | 1 | 2 | 3 | 4 | 5 |

| Outcomes | |
|-----------------|---|
| 28. | What changes have occurred because of the coalition that would not have otherwise occurred? |
| | |
| | |
| | |

| Outcomes (cont.) | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|-------------------------|---|-----------------------|---|---|--------------------------|---|
| 29. | The coalition has been able to achieve its goals and create concrete outcomes. | 1 | 2 | 3 | 4 | 5 |
| 30. | The coalition serves as a catalyst for positive change related to the issues it has chosen to work on. | 1 | 2 | 3 | 4 | 5 |
| 31. | The coalition bring about community change as seen in changes to programmes, policies and practices that improve people's lives. | 1 | 2 | 3 | 4 | 5 |
| 32. | The coalition has effected changes to programmes, policies and practices in many sectors and systems in the community related to the issues it has chosen to work on. | 1 | 2 | 3 | 4 | 5 |

Definitions

Programme changes can be new or modified interventions, protocols and products, such as educational materials, marketing or branding materials and new presentations.

Policies can include facility or agency policies, state policies, federal policies and institutional policies.

Practice changes can include changes to facilities and other institutions and organizations; changes by various practitioners (including physicians, nursing or social work staff members or facility administrators); changes by government; and changes by individuals affected by the issue.

| Outcomes | |
|-----------------|--|
| 33. | What specific changes to programmes, policies and practices have you seen that were created by the work of this coalition? |
| | |
| | |
| | |

| | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|-----|--|-----------------------|---|---|--------------------------|---|
| 34. | The outcomes created are necessary and effective. | 1 | 2 | 3 | 4 | 5 |
| 32. | After each activity or project, the leadership of the committee or task force evaluates how it went in order to learn from experience. | 1 | 2 | 3 | 4 | 5 |

| Relationships | | <i>Strongly agree</i> | | | <i>Strongly disagree</i> | |
|----------------------|---|-----------------------|---|---|--------------------------|---|
| 36. | Old or existing partnerships have been enhanced as a result of the coalition. | 1 | 2 | 3 | 4 | 5 |
| 37. | New partnerships have been built as a result of the coalition. | 1 | 2 | 3 | 4 | 5 |
| 38. | Members of the community associated with the issue now know more about each other's resources as result of the coalition. | 1 | 2 | 3 | 4 | 5 |

| Systems Outcomes | | <i>Strongly agree</i> | | <i>Strongly disagree</i> | | |
|-------------------------|--|-----------------------|---|--------------------------|---|---|
| 39. | The coalition has brought about systems changes, including changes to relationships in the larger community that works on the issues the coalition has identified and in the capacity of the coalition to address emerging issues. | 1 | 2 | 3 | 4 | 5 |
| 40. | There have been positive changes in the community working on the coalition's issues(s); as a result of the coalition, partners are more collaborative and more co-operative. | 1 | 2 | 3 | 4 | 5 |
| 41. | The coalition has helped people in the community access more resources both within and outside the coalition. | 1 | 2 | 3 | 4 | 5 |

| Benefits of Participation | | <i>Strongly agree</i> | | <i>Strongly disagree</i> | | |
|----------------------------------|--|-----------------------|---|--------------------------|---|---|
| 42. | The community and its residents are better off today because of the coalition. | 1 | 2 | 3 | 4 | 5 |
| 43. | I have benefited from participating in the coalition through: | | | | | |
| | a. Building relationships with other coalition members. | 1 | 2 | 3 | 4 | 5 |
| | b. Exchanging information with others and networking. | 1 | 2 | 3 | 4 | 5 |
| | c. Working with others on issues of importance. | 1 | 2 | 3 | 4 | 5 |
| | d. Being part of a process that brings about meaningful change. | 1 | 2 | 3 | 4 | 5 |
| 44. | My organization has benefited from its participation in the coalition through: | | | | | |
| | a. Modified programmes. | 1 | 2 | 3 | 4 | 5 |
| | b. New programmes | 1 | 2 | 3 | 4 | 5 |
| | c. Access to new or more resources. | 1 | 2 | 3 | 4 | 5 |
| | d. Creating solutions collaboratively with other coalition partners. | 1 | 2 | 3 | 4 | 5 |

| Overall Rating | |
|-----------------------|--|
| 45. | What changes have happened in your own organization as a result of the coalition that would not otherwise have occurred? |
| | |
| | |
| 46. | Have there been any surprising or unplanned outcomes as a result of the coalition? |
| | |
| | |
| 46. | What are the three most significant outcomes resulting from the coalition? |
| | |
| | |
| | |

Glossary

Coalition: A group of individuals, organizations, communities, religious institutions, businesses, journalists and/or government agencies with a common interest who agree to work together towards a common goal. A coalition is a form of collaboration or partnership for a specific purpose. It differs from the common understand of the term “partnership,” in that it involves more than two partners. It also differs from a dialogue – an activity adopted by many coalitions, but which does not constitute a coalition except as part of a broader strategy in which participants work together towards a shared goal.

Committee: A subgroup within a coalition that completes designated activities on behalf of the coalition. Committees typically meet more frequently than the coalition as a whole and help to ensure that the coalition’s work progresses.

Dialogue: A facilitated, co-operative and constructive interaction between people of different religions, beliefs and/or cultures. Dialogues are a strategy used by many coalitions, but a dialogue alone is not a coalition. A dialogue may evolve into a coalition if the participants decide to work together towards a common, specific goal.

Formal sector: The organizations, agencies and other established entities that make up a coalition. Formal sector entities usually have a budget, staff, a website and other useful resources.

Governance: This refers to how decisions are made in the coalition, who is empowered to make those decisions and how leadership responsibilities are assigned and shared.

Informal sector: This includes groups and individuals who have good connections to the people most affected by the issue a coalition is addressing, but who may not have the same resources or staff capacity as those in the formal sector.

Partnership: Two or more people or entities that collaborate for a common purpose. When a partnership contains more than two partners (or members), working towards a specific goal, it can also be called a coalition.

Stakeholders: Those who have a stake in the outcome of the coalition’s work. This will include those who are directly impacted by the issues of intolerance and discrimination, individuals and organizations that are currently involved with efforts to address these issues, opinion leaders (people who shape others’ understanding of an issue), and those whose lives or work may be affected by the coalition’s efforts.

Structure: The framework around which the coalition is organized. For example, a coalition's structure may include working groups, committees and/or leadership positions.

Sustainability: A coalition's ability to continue to function until it has accomplished its goals. It also refers to a coalition's ability to ensure that its accomplishments have a lasting impact on the broader community, so that programmes continue to thrive, community attitudes continue to shift towards tolerance and policy gains are not reversed, and so on.

Working group: A subset of the coalition tasked with advancing a specific area of its work. Working groups may be formed to address each of the coalition's main goals, develop more detailed work plans, and lead the implementation of those work plans.