

Module 3: Coalition



GOALS

By the end of this module, participants should be able to understand:

- That coalition building is actually harder than building a single organization.
- Organizational self-interest.
- Specific guidelines for success and how to analyze potential allies.



TIME

Total: 60 minutes

- Presentation: 30 minutes
- Exercise: 20 minutes
- Debrief: 10 minutes



OVERVIEW

Coalition building is often one of the most frustrating parts of organizing. The problem is made more difficult because organizers expect coalition building to be easy and don't give it the special attention it deserves. The more coalition experience the group has, the more discussion there will be.



MATERIALS NEEDED

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers



HANDOUTS

- PowerPoint Printout
- Coalitions Exercise (Federal, State or Local from Exercise Kit)



EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
 - Computer with PowerPoint software
 - LCD projector
 - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
 - AV stand or tab (if you will be using PowerPoint in this module)
 - Portable speakers for videos



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Introduction

WELCOME TO MODULE 3: COALITIONS — BUILDING AND JOINING



SAY

By the end of this module, you should understand the following concepts:

- Building a coalition is actually harder than building a single organization.
- Organizational self-interest.
- Specific guidelines for success and how to analyze potential allies.

COALITIONS DEFINED

Let's start with a definition of coalitions. When we use the word coalition we mean:
An organization of organizations that is actively working on an issue campaign.

A coalition is not:

- An organization of individuals who are different from each other.
- An organization of individuals who happen to belong to other organizations as well.

Many groups that call themselves coalitions aren't coalitions. In Grassroots Organizing when we use the word coalition, we mean an organization of organizations. In real life, most coalitions are a mixture of individuals, representatives from organizations and people who happen to belong to organizations but who weren't sent to the coalition by their group. The main difficulty with coalitions of this type is that the people in them have different needs.

Example:

Every organization knows that it must get some public recognition for its work if it is to recruit members, develop a base, and keep its funding. Individuals who are not faced with the problem of maintaining an organization often don't understand this and consider the organizational representatives to be "power hungry" or "domineering." In a coalition where everyone is a formal organizational representative, they might be more competitive, but they at least understand each other's motives.

There are three basic types of relations between organizations, all of which are often referred to as coalitions. It helps to sort them out.

- **Formal Coalitions** — Coalitions exist when groups enter into a formal agreement to work together toward a specific, long-term objective. Some coalitions are permanent or are expected to last for many years.
- **Issue Campaigns** — Groups that get together for an ongoing effort; for example, to pass specific legislation. It is often more useful to say “campaign” rather than “coalition,” when the expectation is that a campaign will go out of existence when the issue is over and not live on to compete with its own members. The key understanding in a legislative campaign is to agree on not only what will go into the bill, but what is the least that the coalition will accept.
- **Informal Coalitions** — Groups work together from time to time, often on a specific event, but without formal agreement or rules.

Building a coalition is one of the hardest parts of organizing. The hard part isn't getting groups to join, but getting the coalition to work and keeping the groups in it. Often we expect a coalition to function the way a group of friends does, but this is seldom the case. Organizations in a coalition have institutional needs and self-interests that are different from the needs of individual people.

- To make coalitions work, we must identify these institutional needs and work to meet them.
- The job is sometimes complicated because the people who represent groups in a coalition may not be experienced enough to articulate their institutional needs. They just know that something isn't going well, and they feel that their organization is getting weaker instead of stronger.

ADVANTAGES AND DISADVANTAGES OF COALITIONS



ASK

What has been your experience working in coalitions?

Possible responses:

- We got sidetracked from our own program.
- Others didn't do their share.
- Too many compromises required.
- Problems with who got credit.
- We felt ripped off.
- The activities were dull.
- Too many meetings.



SAY

It sounds like you have had some very interesting experiences. And not all positive. Let's talk about them. What have been some of the disadvantages of working in coalitions?



INSTRUCTOR NOTE

Make a mental note of who responds. If a lot of people raise hands, there will be much discussion. You need to watch the time here and limit discussion if necessary. If there are a lot of negative comments and bad experiences, start with the disadvantages.

Below are examples of negative experiences:

- We got sidetracked from our own program.
- Others didn't do their share.
- Too many compromises required.
- Problems with who got credit.
- We felt ripped off.
- The activities were dull.
- Too many meetings.

Again, get the story right. You will refer back to these comments when you give the coalition guidelines. For example, "Now Michelle might not have had the problem she mentioned if her local PTA had chosen a unifying issue..." Get five or six comments. Don't spend a lot of time on this.



ASK

So, if working as a coalition is so hard, why do it? What are some of the advantages of working in coalition?



DISPLAY ON A FLIPCHART OR POWERPOINT:

Write down some of the advantages. Again, don't spend a lot of time (just get some advantages written down). Below are examples of advantages if no one says them:

- Able to win something that couldn't be won alone.
- Increases power.
- Increases resources (staff, money, members).
- Broadens the scope of our work.
- Able to get better/more media coverage.

GUIDELINES FOR COALITION BUILDING

As you go through these guidelines, relate them to the problems you just listed from members' experiences. List them on easel paper or PowerPoint.



SAY

So, your PTA council knows what the problem is and what the issue is. It also knows that there are other organizations that are concerned. In order to increase your power and resources, and to win something you couldn't win alone, you decide to build a coalition. Here are tried and true guidelines for successful coalition building.

1. Choose Unifying Issues.

Avoid shopping lists. When coalitions form to work on a specific issue, it is a relatively easy structure to organize, because those who aren't interested just don't join.

- When an organization is a permanent ongoing coalition that moves from issue to issue, then the choice of issue needs to be made more carefully. This is the key. The issue needs to be one that is important to all groups in the coalition. It should not be the main issue of any one group. This avoids having some groups feel that they are being co-opted to work on someone else's issue.
- Avoid coalitions based on groups agreeing to exchange help, "We'll help you fight the utility rate increase if you help us win funding for an after school program." Organizations can rarely deliver their members to work on some other group's program, and no group feels that it gets enough out of the coalition. Coalitions in which groups put their issues on the table and try to work on all of them are called shopping list coalitions.

2. Coalitions are Rarely the Road to Diversity.

Don't create coalitions in the hope of bringing greater diversity to your efforts. Diversity will only be achieved if the coalition partners are really interested in similar issues and need each other in order to win.

3. Avoid Contorting your Program to Suit Some Other Group.

Likewise, don't expect them to change their program just so that everyone can be friends.

4. Understand and Respect Each Group's Self-Interest.

Every organization needs to:

- Gain new members.
- Raise money.
- Be seen as powerful by administrators or politicians.
- Get publicity.
- Build relationships with other groups.
- Provide an exciting activity for its members.
- Build internal morale.
- Have a public role for its leaders.

These are good things to do. Experienced leaders can use a coalition to achieve them. Inexperienced leaders neglect them and their groups dwindle. The coalition should help its members accomplish these things.

5. Respect the Group's Internal Process.

Every group has its own way of making decisions. Don't rush them. If you don't like the answer from the group's chair, don't go around the chair to someone else in the leadership.

- Don't get involved in another group's factionalism or worse, cause it.
- Don't use the work of the coalition to draw the members of another group into your own group.

6. Agree to Disagree.

Not everyone has to agree on everything. The coalition can only function within the areas of agreement.

7. Play to the Center With Tactics.

All groups should be comfortable with the tactics. There are sometimes advantages to encouraging the more confrontational groups to go off and do their thing independently. However, it should be part of the overall strategy.

8. Recognize that Contributions Vary.

Some groups are better at conducting research; others can turn out a large number of people, or may have good community contacts.

A coalition should have a budget, even if everything is contributed. Put down the cash value of contributed items. This allows the member groups to better understand the importance of their respective contributions.

9. Structure Decision-Making Carefully.

One group, one vote. This method only works if the groups are of equal strength. The small groups should not be able to out-vote the large just because there are more of small groups. Individuals should not be able to out-vote organizations. It is often better to recognize that in some coalitions, everyone is not equal. The program won't work if the strongest groups don't support it, and it is acceptable for marginal organizations and individuals to stay out of a particular activity in which they don't feel comfortable participating.

When faced with these problems, many groups turn to consensus decision-making, in which everyone has to agree on everything. This is fine if you can do it, but recognize that it excludes people who can't spend long hours at meetings. The decision-making process is often smoother when the coalition is composed strictly of organizations that can make more or less the same level of contribution to the work. The decision-making process should be clear from the outset. So should the ground rules.

There is no such thing as the "democratic right" to join a coalition. You can allow in, and keep out, whichever groups you wish, including sectarians and disrupters. Don't be guilt tripped.

10. Urge Stable and Senior Representation at Meetings.

The same people should represent a group at each coalition meeting, and they should have the power to commit the group to, or approve, the coalition program. Otherwise, the coalition can't move without long delays.

11. Distribute Credit Fairly.

The coalition itself needs to get the larger share of publicity or credit. Otherwise the whole isn't greater than the sum of the parts.

Try to distribute the remainder of the credit, media attention or spokesperson positions among the individual members fairly, but with an eye to the contribution that each makes.

12. If There is Staff, It Should be Neutral.

Problems develop when the staff is contributed by one member organization of a coalition. If there is staff, they should be people with no other loyalties, whose main job is to build the coalition as a whole. For coalitions that do not have paid staff, this also applies to leadership and facilitation roles.



INSTRUCTOR NOTE

Ask for discussion as time allows.

GUIDELINES FOR JOINING COALITIONS



SAY

Suppose another organization approaches you, as the leader of your PTA unit, to join a coalition. There are several things that your group must first assess before agreeing to join. Here are some guidelines for joining and participating in coalitions.



DISPLAY ON A FLIPCHART OR POWERPOINT:

Guidelines for joining coalitions:

1. Know what you want to get out of it.
2. Know who is behind the coalition.
3. Maintain an independent program.
4. Evaluate your role carefully.



SAY

1. Know What You Want To Get Out of It.

Of course you want to win on the issue, but you are also building the PTA. How will participation in the coalition help you do that? Will it:

- Expose you to more potential members?
- Allow you to win more significant victories?
- Share the burden of organizing large activities?
- Get you publicity?

Example

A student association at a large state university was fighting cuts to the state education budget. Another statewide organization was fighting tax cuts for corporations that were forcing cuts to the state public programs budget. Naturally, the groups were interested in working together when they found out about each other's campaigns. Before joining a coalition, however, the student group set the following conditions:

- *Opposition to education budget cuts had to be a major demand of the new coalition.*
- *Other students on the campus who wanted to get involved in the coalition would be told to join through the association.*
- *The student association's leaders would be frequently used as spokespeople for the whole coalition.*
- *A major coalition turnout event, a speakout on the state budget, would be held in an auditorium on campus.*

Did this arrangement strengthen the student association? Of course it did, but it also strengthened the whole coalition. The speakout drew more than 900 people, and half of them came as a direct result of the student group's efforts.

2. Know Who is Behind the Coalition.

- Who is funding it?
- What are you expected to contribute?

3. Maintain an Independent Program.

A group that is only strong enough to do one thing at a time shouldn't join a coalition. If you have no program outside the coalition, you won't develop your own identity or membership. It may not seem to matter, but where the coalition goes; your group will go with it. Use the three-fourths rule: three-quarters of your energy and resources should go into your own organization.

4. Evaluate your Role Carefully.

Is it really necessary for the leaders of your group to play a large role in the leadership and decision-making of the coalition, or is it enough to get your members to show up for occasional coalition activities?

The coalition can absorb all of your time and energy just as easily as your own organization can. If three-quarters of your effort doesn't go into building your own group, your members will be drawn into the activities of the coalition or be recruited away by other groups.



INSTRUCTOR NOTE

Discussion as time allows.



INSTRUCTOR NOTE

On the pages that follow are directions for a Coalition Exercise.

There are three case studies available. Each illustrates advocacy at the local, state, or federal level. You should have selected the level you believe to be the most appropriate and relevant to your group, and copied the handouts for that level's case study to use in the following exercise.

Reminder, the design of this course is for the level addressed to remain consistent throughout. That is, if you work the local level case study in this module, you should work the local level case studies in all the other modules.

Coalition Exercise

Local

FORMING THE ST. FINBAR EDUCATION COALITION

OVERVIEW

Participants practice evaluating possible coalition partners to work together on a local issue.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

In the campaign to get the bus service restored to all magnet schools in the district the Linguistic Institute PTA has decided that it must involve other organizations to build enough power to be successful. School Board Member Hubert Gonzalez has agreed to introduce the proposal. You are the leaders of the PTA, and have decided to form the St. Finbar Education Coalition. You are considering asking the following groups to join:

- The Greater St. Finbar Small Business and Manufacturers Association
- St. Finbar chapter of the State Senior Citizen Federation
- St. Finbar Interfaith Committee
- The St. Finbar branch of the NAACP

Coalition Exercise

Local

ASSIGNMENT



TIME

Total: 20 minutes

You have 20 minutes to answer the questions below. From the perspective of the newly formed St. Finbar Education Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the St. Finbar Education Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

NOTE: Do not role play the planning meeting. Answer the questions from the perspective of the Linguistics Institute PTA.

Coalition Exercise

State

FREMONT PTAS ORGANIZE A COALITION

OVERVIEW

Participants practice evaluating possible coalition partners to work together on a statewide issue.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

In the campaign to stop the \$2 billion in cuts to the state budget, the New Leif PTA has asked PTA units that have not received a commitment from their state senator to vote against the cuts to invite other organizations into the campaign to increase their power. A few members from PTAs in Fremont met with Sen. Rosten and asked her to vote against the cuts. Sen. Rosten says that she is getting a lot of pressure from some of her constituents to vote for the cuts. Several of the Fremont PTAs have decided that to win they must form a coalition. In addition to recruiting all the PTAs in the area, you are considering asking the following groups to join the coalition:

- The Fremont Retail Merchant Association
- The Fremont chapter of the State Senior Citizen Federation
- The Fremont Interfaith Committee
- The Fremont branch of the NAACP

Coalition Exercise

State

ASSIGNMENT



TIME

Total: 20 minutes

You have 20 minutes to answer the questions below. From the perspective of the newly formed Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

NOTE: Do not role play the planning meeting. Answer the questions from the perspective of the Fremont PTAs.

Coalition Exercise

Federal

REAUTHORIZATION OF THE CHILDHOOD NUTRITION ACT

OVERVIEW

Participants practice evaluating possible coalition partners to work together on a federal issue.



TIME

Total: 30 minutes

- Exercise: 20 minutes
- Debrief: 10 minutes

BACKGROUND

In the campaign to pass the Reauthorization of the Childhood Nutrition Act, the National PTA has asked your county council to get Congressman Ethan Charles to vote “YES” on an amendment to include a minimum federal protective nutrition standard for foods sold outside of school meals. PTA leaders met with Rep. Charles and asked him to vote for the amendment and the reauthorization. Rep. Charles was quite friendly. He said that he totally respected the PTA and all its good work, but he thinks that trying to “regulate what is in a school vending machine is just not the role of the federal government.” Your PTA has decided that to win it must form a coalition. You are considering asking the following groups to join:

- The County Medical Association
- The Interfaith Committee
- Local 123 of the State Education Association
- The County Branch of the NAACP

Coalition Exercise

Federal

ASSIGNMENT



TIME

Total: 30 minutes

You have 20 minutes to answer the questions below. From the perspective of the newly formed Coalition, consider why the group that you have been assigned (one of the four above) would want to be a part of the coalition, and the resources and liabilities they would bring to the coalition. Choose one person to record the answers on easel paper and present them to the larger group.

1. Why would the organization be interested in joining the Coalition?
2. What might prevent the organization from joining the Coalition?
3. What resources could the organization bring to the Coalition?
4. What liabilities might the organization bring to the Coalition?
5. Who would you contact? Who from the PTA should make the contact?

NOTE: Do not role play the planning meeting. Answer the questions from the perspective of the PTA County Council.