



# Full cookbook

## “Cooking Up” Coalitions: Introduction to Coalition Building

**This cookbook is a guide to successful coalition building practices, inspired by the experience of and meant to sustain the work of Energy Efficiency for All...as well as other coalitions and networks for social change.**

**A coalition is any group of organizations and individuals who come together to improve policy, programs, and/or practice for greater social benefit. This can be in one area (environmental conservation) or link several areas (health, social equity, energy efficiency).**

**Successful coalitions require attention to relationships and creating structures that allow for clear decision making and open communication to achieve results.**

## How to Use This Cookbook

This is a cookbook meant to help structure and strengthen existing coalitions – grounded in the experience of Energy Efficiency for All – yet usable and generalizable to coalitions and networks more broadly and across a range of issue areas.

Energy Efficiency for All is a national partnership of the National Housing Trust, the Energy Foundation, the Natural Resources Defense Council and Elevate Energy dedicated to increasing energy efficiency in multifamily affordable housing. The partnership works primarily through state-based coalitions across the country and has achieved significant policy, programmatic, and funding victories to integrate resource efficiency, health, and equity for residents, owners, and developers of multifamily affordable housing.

Coalitions are a key means to achieving success both for policy advocacy, program change, and for achieving long-term transformational change. Bringing together and sustaining a coalition – any group of organizations committed to a shared vision, jointly defined goals, and consolidating resources – is the main focus of this guide, which reviews practical steps and guidelines, suggests specific coalition behaviors, and offers suggested tools for structuring and strengthening coalitions.

This cookbook is a reference guide for those building coalitions to use as a living document (much like a coalition which evolves in response to its changing circumstances—whether focus, external landscape, or membership) and anyone using the cookbook is free to suggest additional “ingredients” or changes in technique around a particular recipe.



#### *TRY THIS*

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On each page you will find both a “Feedback” tab along the left margin of your screen and a Comment box at the bottom of the page where your input and questions are welcome. We will do our best to respond to and/or integrate your ideas so that the cookbook can serve as a community resource created by the community.



## Why a “Cookbook”?

While there are numerous ideas and resources around how to create and sustain coalitions, the act of building coalitions is more art than science. Like cooking, coalitions change with the ingredients, time, “temperature”, and technique used.

This cookbook is intended as a resource which offers guidance on coalitions for all interested, and specifically to support EEFA state coalitions to deepen their effectiveness. EEFA coalitions will receive coaching around how to use this cookbook and specific skills they want to explore further.

Outcomes we imagine from using this resource include realizing bigger, more frequent advocacy wins; developing stronger coalition and network mindset/sensibilities and behaviors; increasing trust and

camaraderie; augmenting integration between previously disconnected members or issues within a coalition; and growing connections and coordination between coalitions.

## Cooking Up Coalitions

A coalition is any group of organizations that comes together for a specific goal or set of goals. It is a building block for broader transformational change and usually has a “limited shelf life” –which could be months or years, depending upon the goal–yet can also become “baked into” a broader network with a similar vision and purpose.



A network is usually a larger, loose affiliation of organizations and individuals that may have a shared goal. Likely, these organizations and individuals have a guiding vision or a particular set of issues which allow goals and activities to emerge.

Networks and coalitions are both collaborative structures that serve as the building blocks for movements and long-term shifts in practice and society. However, while connected – networks can often spawn coalitions and coalitions may be a part of or engender larger networks–they are different in terms of their membership requirements, decisionmaking structure, duration and culture (which we review later)

Coalition building, in the way we are referring to it, is an outgrowth of community organizing and movement building practice, and is fundamentally about creating power to advocate for change.

## Recipe Basics: Coalition Structure, Function, Duration

Coalitions are most often used in policy and program advocacy at a variety of scales and involve sharing both resources and strategy across a core group of organizational partners. While membership is usually clearly defined through a set of criteria, coalitions can have allies and other partnerships, which is where they are linked to networks as a feedstock and basic ingredient for social change.

However, coalitions are often shorter-term, focused on a single or discrete set of goals (e.g. winning a policy victory that changes conditions for coalition members’ constituencies, like an energy efficiency program that provides weatherization services or other upgrades serving low income residents of multifamily affordable housing). Even though coalitions are shorter-term collaborative forms, they can (and should) nourish long-term relationships like a sourdough starter that not only makes a delicious loaf of bread but can be used over and over again to do so.

Because of their short duration, coalitions should be attentive to the longer arc of their impact and options for continuing the relationships that have been created moving forward (we address this later in the cookbook around Expanding the Pie)

## Connecting Cooks and Ingredients: Relationships Make the Meal

Any recipe is only as good as the hands that make it. While we are in an era where increasing collaboration is required of us, and we are evolving from institutional to more networked structures for change, the organization remains the central cook in the coalition kitchen.

Because of this, much of coalition building involves the way in which all of the cooks agree upon the ingredients and work together to produce a delicious dish or meal. This involves some key practices to ensure coalition success.

### **COLLABORATE. Balancing a coalition (or network) “mindset” –how we understand and act in**

relationship across organizational boundaries—with the agenda and needs of our own organization, much of which involves devoting time and other resources to a collaborative pursuit.

### **ADAPT. Navigating decisionmaking and graceful conflict resolution in setting an agenda, pursuing**

priorities, securing and allocating resources, and sharing our stories.

### **INNOVATE. Understanding and embracing abundance: not being constrained by limited resources or**

the expectations around how things have always been done or usually are done by individual organizations.

### **CONNECT. Practicing authentic relationship building: successful coalition recipes combine the**

“what” and the “how” with the “who” — cooking up something tasty is an act of love...for the ingredients and how we mix them together, for ourselves, and for those we work with (see self-care section);

<http://movementstrategy.org/love-in-a-time-of-hate/>

### **ENGAGE. Emphasizing the role of equity in relationships to promote understanding of power**

dynamics in who’s “in the kitchen” or “at the table” and who is not. The participants/tone/culture of any coalition can reinforce the behaviors we are trying to shift.

“The EEFA Kitchen”

Energy Efficiency for All is a national partnership where the four principal partners are modeling the type of shared leadership needed for supporting successful coalitions and networks. Other partners—nationally and on a state-level—have been invited to participate in the “EEFA Kitchen” to build connections and create recipes for change grounded in their specific state and local landscape among those around the table.

Ingredients

**Clear goal: link the promise of energy efficiency AND affordable multifamily housing**

**Defined objectives: advocacy, implementation and network development**

**Support structure: national partnership linked to state-level partners**

**Flexible pathways: states set an agenda based on landscape conditions/capacity**

Process

**Engage a wide variety of partners at the national, state and local level for input around goals, objectives, and process (through convenings, small meetings, group/individual calls)**

**Articulate visionary goal and key objectives with team of partners based on feedback**

**Work to align field level needs with resources**

**Develop national partnership structure**

**Appoint state leads to connect national partnership with state coalitions**

**Select core partners across a diversity of experiences, fields, and constituencies**

**Develop advocacy and action objectives for each coalition, aligned with national objectives**

**Provide ongoing communication and capacity-building**



**Consider [this sample commitment letter](#) for coalition members to sign on to when joining.**



**Still confused about structure? Read [a short piece](#) on the difference between coalitions, collaboratives, and networks.**



**Get inspired by some exemplary [catalytic collaborators](#) who are changing how organizations work together.**

For more resources, tools, and thought pieces, see the [full Flavors and Accompaniments page](#).

# Key Ingredients: Who's Involved and Why

**It's important to be aware of all of the ingredients you'll need to cook up a winning coalition as well as how to use them and in what proportion.**

**Many coalition characteristics (and chances for success) are “baked in” at the start. Coalitions can change and adapt, but the way in which ingredients are added and mixed matters.**

**Considering whom you'll need to realize coalition goals, how you frame principles for working together, and how you sustain engagement are critical parts of any recipe.**

## Beginnings: Understanding Coalition Ingredients

Every coalition starts in different ways and has a different recipe that has enabled it to succeed or fail. Coalitions always come together where there is an alignment in terms of a community, regional, state, or national/global need identified where a single group or existing coalition is unable to address the complexity of the challenge.

Basic coalition ingredients include:

**Origins. How a coalition starts can determine its chances for success, and there are certain elements** of a coalition that should be “baked in” from the start: did the coalition come about from a genuine need or the agenda of a single organization? Was it started by a set of organizations and individuals on the ground, or sparked by a funder? Who was involved in setting the agenda, membership, and structure?

**Participants. Who is involved in a coalition and what size is appropriate depends upon its focus.** Having a membership that is representative of the issues addressed and constituencies served is critical, and these groups should be engaged (and ideally resourced) at the beginning of coalition development.

**Principles. Clear principles and values help provide a container for the coalition's work. Leading with values** brings in particular qualities, and creating conditions where these values are centered helps guide work and is essential in alliance building.

**Goals. Having a clear vision and well-defined goals assures that everyone in the coalition can align** and move in the same direction (as with ingredients in any recipe!)

**Structure. Ensuring that a coalition has a particular structure for tasks such as decision making, goal setting, work planning, communications, and conflict resolution.** Considering what roles members play is essential.



**Culture.** What are the practices the coalition uses to build and sustain relationships, and support (or change) the structure and strategies it has created to guide its work.

**Sustenance.** While coalitions are short term structures to achieve a particular set of goals, they often need funding to support their efforts and should consider larger questions about how their work is connected to a broader network or might continue after the coalition no longer exists.



### TRY THIS

Can you identify each of the above coalition ingredients in a sentence or two for your coalition? If not, how might you frame each of these? Consider a brief overview document that describes the basic purpose and characteristics of your coalition.



## Membership and Inclusion

Coalitions can range in size and scope, and membership is largely determined by alignment around coalition purpose and goals. When considering initial or expanded membership, it is critical to think about the balance of being inclusive and determining core participation.

**Determining and Defining Membership.** Membership in a coalition is primarily determined by alignment with coalition goals, connection to stakeholders and capacity for working collaboratively. It is vital to think about the appropriate mix of diversity within the coalition which allows for both access to a variety of constituencies and meaningful integration of different issues and perspectives.

**Structuring Membership.** Coalitions can have a core number of members (for most local, regional, and state coalitions, this can range from 4-12 members depending on size and issue), but there are also possibilities for structuring tiered membership, where there are a range of responsibilities and capacities at different levels moving out from those who are at the core.

**Inclusion.** In doing work that supports social change, it is absolutely central to design coalitions that authentically speak to and include representatives from groups that are often marginalized or oppressed. In order to engage communities and create meaningful change, a coalition must explore (in both membership and in principles/priorities) how there is a cross-section of perspectives from the very beginning. Inclusion doesn't require including everyone, but finding the right combination of voices that have a stake in the issue(s) you are addressing. Beyond including these perspectives within a coalition, there is the potential for structuring membership so that additional organizations that represent a diversity of constituents and viewpoints at "adjacent tables" are engaged and can broaden the coalition's understanding of the communities it is designed to serve.

**Transition and Expansion. No dish is exactly quite the same every time you make it and changes in** ingredients and amounts can fundamentally alter the flavor of a coalition. Having consistent membership and a plan for flexibility and change is critical. Assuming that there will be transition (and having some strategies for what ingredients you might substitute), and understanding that founding members may eventually leave can help with continuity. There also must be a plan to allow for new members to join the coalition—and the timing and criteria for this must be agreed to by all coalition members. Listing criteria and using a tool to delineate and track member terms and background information is a best practice for coalition building.



### TRY THIS

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Sparking Engagement. There are many ways to engage existing and potential partners in a coalition process; from one-on-one conversations to seek mutual interests and benefit to group learning sessions to events to build connections across a broader network connected to the coalition's purpose. Conversations around engagement should be guided by the shared interests of all parties and clarify specific next steps around "membership" depending upon each organization's willingness and capacity to participate.



## Clarifying Principles

Most recipes for coalition building go awry because "cooks" skip the critical step of defining principles that will determine how coalition members will work together. As important as agreeing to a vision and specific objectives for any coalition—if not moreso—a set of principles establishes the culture of a coalition or network and helps govern behavior, build trust, and serves as a foundation for mitigating conflicts.

Developing and agreeing to coalition principles involves the following steps:

**Individual/partner and whole group conversations about principles that are important for the success** of the coalition: this may be framed as "What's most important to you in working with others?" or "What principles from your work do you bring to this coalition?"

**It may be helpful to look at principles developed by other groups—whether coalitions or organizations** to provide some ideas of what has worked for others.

**Coalition conversations about prioritizing a brief list (5-7 principles is typically helpful) AND how** members will uphold/revisit commitments to these principles regularly



**Creating and using a document that describes coalition principles is a good practice to sustain**

commitment—including having them read/posted at regular meetings, checking in about one in particular and talking about how it is being operationalized, and circulating them to existing and potential members

## Setting Goals

While there are many coalitions and particularly networks that value experimentation and emergence (and these can be used as incubators for transformative ideas and action), it is crucial that a coalition clarify a long-term vision for the change it hopes to achieve and specific goals or objectives it will pursue in doing so.

**Goals are determined in a deliberative process with all coalition members—and often with input from a larger group of stakeholders:** coalition members should clearly delineate the process they are using and who will be consulted in developing goals

**There is often a challenge in weighing interests and ideas from core coalition partners, community members, funders, agency representatives, and a range of other stakeholders.** Coalition goals work best when they are both specific in their focus AND in clarifying how contributions will be incorporated.

**Tensions can develop when a vision and goals/objectives are set without including the authentic voice and experience of those constituencies being served.**

**Goals should follow a “3-5 rule:” it is often difficult, especially in coalitions, to pursue more than 3-5 different goals at any one time.** Setting fewer goals still provides some diversity of impact, but focuses the resources across the coalition in terms of time, human potential, and funding.

**Additional issues can be tracked via accessible tools (such as an online forum or newsletter) and in regular coalition meetings** where updates beyond progress on specific objectives can be shared. Certain tools can also help determine and align core objectives with supportive issues to monitor.



### TRY THIS

*Goal Setting Gumbo.* Encourage all coalition members to submit their recommendations for goals via an online survey or on post-it notes (during a face-to-face meeting). Cluster similar suggestions prior to or during a coalition meeting. Allow coalition members to “vote” (via a follow-up survey or sticky dots for in person gatherings) and report back on the priorities which have emerged. You can further divide the priorities selected into areas of primary focus for the coalition and issues that the coalition will track. It may be that one or a subset of coalition members is working on issues that are important, but don’t require the entire coalition’s attention.



# Funding

Funding is an essential part of the coalition recipe, a resource that can help all of the ingredients and flavors blend. It's important to realize the positive power of funding partners, and some of the challenges—where flavors that don't work together according to the palate of coalition members are sometimes introduced and need to be reconciled.

**Funders are a powerful spice. It's important in a coalition or network context to regard funders as partners,** which allows coalition members to acknowledge their contribution (in many regards beyond the financial role they play) and hopefully to talk more openly about power and the influence funders have in the process.

**Funding can influence membership. Either via funder recommendations or in terms of who receives funding and who may not,** coalition memberships are often influenced (intentionally or otherwise) by funding decisions.

**Having clear coalition guidelines for talking with funders about coalition membership and other matters is a critical practice.** Often, individual organizations have relationships with funders and it's important—at the very least—for there to be transparency in these relationships if they are using these connections to discuss coalition business.

**Not surprisingly, it's a promising coalition-building practice for organizations to advocate for core coalition funding AND support for individual coalition members jointly.** Rather than having each organization advocate for itself, illustrating the importance of the ecosystem of relationships to funders makes a stronger funding case and builds trust among partners.

See appendix for resources for funders.



Use [this list of questions](#) as a starting point when developing membership guidelines, from **The Hospice of the Florida Suncoast**.



Assess and facilitate issues of oppression, exclusion and inequality with [Social Transformation Project's Tools for Equity and Inclusion](#).



Try out some [Bebopping to build trust and communication](#).

For more resources, tools, and articles on Key Ingredients-related themes, [see the Flavors & Accompaniments section](#).

# Choosing the Right Recipe for You: Setting Strategy and Priorities

**Your coalition should have its own “cookbook”:** the recipes that help you define what you are making and how you are working together to do so (and to avoid “too many cooks in the kitchen”)

**Coalitions need as much—if not more—structure and accountability as individual organizations** because of the complexity of working with multiple players aligned around work in dynamic landscape

**Agreements around roles (and understanding what flexibility and capacity) each member brings (and understanding how this changes over time)** is key to coalition success.

Every coalition is different; although we are sharing some time-honored practices, perspectives, and recipes to try in this cookbook, each coalition has a set of ingredients and flavors that work best, and that shift over time with changing circumstances and membership. This section focuses on “the main meal” for most coalitions—setting priorities and creating accountability.

## Setting Strategy and Priorities

Coalitions are often seen as more loose or fluid than traditional organizations, but because of the complexity of bringing a number of groups together to align and work together toward a specific vision, it’s usually the case that even more structure is required.

When planning to set strategy and priorities, this means:

**Strategic planning in a coalition context is important, and while it often moves more quickly than that** of organizational strategic planning, it is even more important to be clear on a shared vision, agreed upon outcomes, specific strategies, concrete objectives, and coalition member roles (see accountability section below).

**The “rule of 3-5” is a good general guideline for the number of strategies or priorities that a coalition** can effectively pursue. Because of the number of organizations involved, coalitions often fall victim to an “everything in the pantry” strategy, rather than being selective about *what the coalition is uniquely suited to do* beyond the individual organizations that comprise it.

**After clarifying the role of the coalition, coalition members should brainstorm strategies and** priorities that fit their understanding of the coalition’s work (not necessarily their own organizational priorities, though there should be overlap). See the **“Goal Setting Gumbo”** activity for one prioritization technique. Other options include forced ranking among members, consensus building in small groups, and scenario planning.



### TRY THIS

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#### *Creating and Using a Workplan: Your Coalition's Cookbook*

Because coalitions and networks demand greater structure because of the greater number of actors involved, coordinating roles and intersecting scopes of work usually requires a transparent tool that consolidates information. This enables all coalition activities to be viewed and tracked by any coalition member, and to be used as a guide during coalition meetings and calls.

There are a variety of approaches and uses of any workplan—the formats and practices for monitoring that individuals and collaborative ventures are comfortable with vary greatly—but something simple that breaks down priorities by objective or strategy and allows monthly activities/tasks to be detailed briefly in an online spreadsheet works well for most coalition efforts. There may be a second or third sheet with details of how to use/update the workplan or a roster of coalition members with contact information.

The most critical piece of this recipe is attention. Just as you wouldn't leave a pot on the stove—even if simmering—without checking it regularly, a workplan needs to be checked and stirred (not daily, but perhaps bi-weekly) so that the coalition can keep work moving forward, understand challenges, and address appropriate changes in direction.

A workplan should be a living document which—much as you would do when using a recipe and preparing a meal—should be sampled from and seasoned regularly.

Here's [a sample workplan](#) that should be modified as you see fit.



## **“Everyone works the line”: Coalition Accountability**

In a professional kitchen, everyone has a particular role—yet there is a widely held concept in restaurants that “everyone works the line”: no one is above doing food prep, washing dishes, pitching in when necessary and where needed.

It's important in coalitions to structure clear roles and to participate beyond your role where possible, while remaining aware and being respectful of when members may have flexibility and capacity and when they do not. Clarifying this at the outset is central to understanding coalition roles and accountability. It's also a best practice to engage in an ongoing conversation, as individual and organizational flexibility and capacity shifts over time.

Ways in which your coalition might think about “full-spectrum” accountability include:

1. Conducting interviews, focus groups and/or surveys as part of a beginning analysis (such as SWOT or SOAR) and relationship-building exercise across core members and other stakeholders.

As a primary engagement tool, these can each help a coalition understand the landscape it is navigating, and set vision and priorities...and also offer insights around individual and field-level flexibility and capacity.

This type of analysis is not “one and done”–you don’t discover a winning recipe and never make it again–but should be tried repeatedly as part of coalition-building health.

2. Using initial analysis to determine coalition direction and capacities–and if additional members might need to be invited to add skills, perspectives, constituency connections, person-power, or other resources. There’s nothing as frustrating as working on a recipe and realizing that there is a missing ingredient part way through the process.
3. Developing clear agreements around roles and decision making. Just as a conversation around principles is important early-on, figuring out who will be responsible for what in a coalition (from administration and fundraising to setting direction and leading working groups or topic teams) is essential at the start. Creating a draft document (even an MOU or MOA) that outlines these responsibilities–and then using it to guide conversations about how the coalition is delivering on its goals–is a recipe for success.
4. Building trust through ongoing conversations about accountability. In a coalition (or any relationship) trust is built or broken through connection and action: how personal stories and values are shared (or not) and how we follow-through on our promises (or not) can be the “secret sauce” (or failed recipe) for a coalition. It’s as simple as taking the time to both authentically connect with other coalition members one-on-one and in coalition meetings, and to do what you say you’ll do.
5. Figuring out what shared leadership looks like. In a collaborative environment (from teams and partnerships to coalitions and networks) understanding and agreeing upon who makes the decisions provides clarity: in a context where “there is no boss”, delineating basic decision making (or even using a framework like DARCI, RACSI, or MOCHA) can support accountability and reduce conflicts.



### TRY THIS

*‘Accountabilibuddy’ Biscuits.* When we think of accountability, talk of agreements, workplans, and decision making frameworks can often be overwhelming. But there’s a simple recipe that helps break through this and sets up positive behaviors around accountability–pick a buddy. An “accountabilibuddy.”



This person should be equally dedicated to practicing with you and checking in on a regular schedule is helpful, focused on the commitments you’ve made to the coalition and how you are following through (or not) on these. Not only is this great modeling for broader accountability, it also supports a peer coaching approach which is an integral part of building trust in coalitions.



**Get started with a work plan template.**



**Take the next step with a SOAR (Strengths, Opportunities, Aspirations, and Results) analysis to understand how your work will connect to what’s already happening in the world.**



**Start thinking about how accountability will work with group decisions with a MOCHA (Manager, Owner, Consulted, Helper(s), Approver) model.**

For more resources, tools, and articles on Choosing the Right Recipes, [see the Flavors & Accompaniments section](#).

## Chefs, Not Recipes: Leadership and Conflict Resolution

**It is individual and coalition leadership, more than any other factor, that will influence the ultimate success of a coalition in cooking up whatever recipe(s) you choose.**

**Leadership in a coalition context is shared, and challenges our existing ideas about what leadership looks like.**

**Clear structures for decision making and conflict resolution—and an appropriate culture of feedback and self-care among coalition members—are the respective precursors (“appetizers” if you will) for the coalition’s main dish to succeed.**



# It's About The Ingredients Interacting: What “Systems” Leadership Looks Like

There is an evolution happening in how we think about leadership. A more limited and individual leadership looks like heroic “follow me” or “here’s my vision, get on board” leadership. That is contrasted with a collaborative leadership which builds a shared “where are we going together” mentality, creating relationships among different leaders to make decisions and pursue goals. It’s not that individual leadership is no longer important but that in a collaborative context there is room for different kinds of leading. Ultimately, **it is not the recipe, but the chefs preparing the meal** that are the most important collaborative resource.

Coalition leadership is embedded in practices of systems or network leadership and differs significantly from hierarchical or traditional organizational leadership.

## **Leadership at a systems level is fundamentally about relationships, crafted by skills in listening,**

inclusion, connecting sometimes divergent ideas and non-traditional allies, like a chef that creates a new flavor by combining spices not customarily used together.

## **Leadership from this perspective is less about certainty and more about emergence and**

experimentation: while there can be collective decisions made about priorities, there is a commitment to trying new things and allowing alternative directions to unfold, often unexpectedly.

## **Leadership in systems is about learning and reflection (“reflection turns experience into wisdom”);**

focus should be put not just on getting the work done, but also learning with each other to improve impact over time.

## **Leadership in a collaborative forum is not a role, but an action or function that both relies upon and is**

separated from the work of individuals: who has responsibility for a particular role or idea is collective and can be distributed, shifting from one person to another or one group to another over time (like rotating facilitation each month or each quarter for coalition meetings).

## **Systems leadership honors and prioritizes those voices that might not be in the room, or even in the**

conversation, and acknowledges that practicing shared leadership challenges our conventional ideas of how power is held, and used, and by whom.

# What to Have for Dinner Tonight?: Coalition Decision Making and Governance

Just as leadership and power shift when working in a collaborative context, the way in which this leadership is structured must change: governance and decision making is different in a coalition. There is no one telling

you what to do, or (as we discussed previously) keeping you accountable—you are doing this together and for one another. Not everything needs to be coalition-wide to function as coalition or network decision making. There may be actions that take place among a few groups or at a working group level, however, they are sanctioned by and communicated to the rest of the coalition.

The basic components of a coalition decision making and governance recipe include:

**Decide how to decide. Many coalitions operate via a consensus decision making process by default:**

to most this seems democratic and inclusive, allowing for deliberation and for something to move forward even if it does not have unanimous support and is not the first choice for all. What's most important is that a coalition has agreed how it will decide and is comfortable with the process it uses.

**Clarify decision making process and roles. While decisions don't have to be made by consensus,**

which can occasionally be unwieldy or time consuming in the case of disagreement, there should be a clearly outlined process and everyone should understand their role. A subset of coalition members (for instance, an "Executive Committee") might frame decisions for the rest of the group to vote on or discuss, or decisions can be made (in person or online) via majority decision, ranked choice voting, or approval voting. If there are dedicated coalition staff, they might also be tasked with framing decisions and supporting this process. Coalitions should also categorize the types of decisions made, when they are made—in terms of timing and how quickly turnaround is required—, and who makes them. An administrative decision that can be made by a coalition lead or staff person is different than a policy decision or major communication that might involve most, if not all, coalition members.

**Delineate conflict resolution guidelines. There will always be conflicts—both large and small—that**

arise in a coalition context. With numerous players with different organizational and collective agendas, it must be expected and planned for. Relationship-building, framing agreements and principles, and adopting "an attitude of resolution" are the most effective preventative measures, yet a clear set of guidelines for handling conflict resolution should be crafted and agreed to by coalition members.

**Understand the impact of decisions (and live with/learn from them). Ultimately, decision making is not**

simply about the process, but about the impact of the decisions made collectively. Decisions may have intended, unintended or multiple contradictory outcomes that move forward, and navigating these is as important as the process itself. Just as you'd take care to check regularly on a dish as you're preparing it and as it cooks, coalitions should develop a clear process to "peek in the oven" and adjust as needed....for the current decision and for future ones.



*TRY THIS*

*Decision making Hors D'Oeuvres.* Can you describe your decision making practices like a menu you'd design for some pre-dinner appetizers? Before you dive into the main meal, what whets your appetite and prepares your palate for decision making? Choose three hors d'oeuvres (literally "outside of the main work") that guide you to the main dish (your coalition's priorities and actions): describe your decision making process using three brief steps or descriptive sentences.

Everyone in your coalition should be able to do this (and everyone's choices should align so that your ideas about decision making "taste" pretty much the same).



## Everyone's a (food) critic: Getting feedback, documenting experiences, sharing reflections

A key role for each chef who comes together to cook up a coalition is that of a critic—for one another and for themselves. It is critical (pun intended) for coalition functioning and growth to be able to have open, honest conversations that help with course corrections—for individual decisions and roles, or for the coalition's trajectory as a whole.

Creating a culture that values and practices feedback and learning might involve the following practices:

**Coalition culture and mindset. Working together in a coalition requires a distinct mindset from that of** more traditional, more hierarchical organizations. Creating a separate coalition culture that is able to blend the identities and practices of individual and institutional members yet allow for a new set of relationships and behaviors to evolve is critical. The meal tastes entirely different than its constituent ingredients.

**Experimentation and innovation. One of the ways in which a coalition or network culture differs from** most organizations is that there is more tolerance (and even encouragement) of trying new things. Having a plan that includes some clear and concrete actions, and creates space for experimentation and emergence is a vital part of forging a culture where learning and feedback are more prevalent.

**Documentation and sharing. Both coalition culture and function depend upon the capture and free** flow of information among members: individual project successes and challenges should be documented and discussed, as well as the process that the coalition is using. While this typically is referred to as "evaluation" in organizations (and in coalitions and networks as well), it's useful to reframe this as a practice of learning for continuous improvement—in both impact and trust-building.

**Exploration and engagement. One reason to be involved in a coalition or network is to get** perspectives and create an impact beyond what is available when acting as an individual or sole organization. Even coalitions and networks need to continue to broaden their horizons to sharpen their effectiveness—to other experts, practitioners, or coalitions and networks in their own field(s) of practice... and even in other fields. Breaking down silos isn't simply about putting our silos together in a bigger silo.

**Time and space. Ultimately, creating a successful coalition culture that values relationships, trust,** and the feedback to build both usually looks and feels different than typical hierarchical relationships in organizations. One main feature of this is that successful coalitions dedicate the time and space—through

individual relationship-building, regular working group and coalition meetings, and semi-annual check-ins or retreats—to allow for learning, feedback, and new ideas.

## Transforming Coalition Conflicts

*‘...in this world, nothing can be said to be certain, except death and taxes.’ –*

*Benjamin Franklin*

And conflict.

In any decision, in every moment, there is the possibility for conflict...and for its resolution or transformation. Work in coalitions and networks must anticipate conflict and create a structure for handling it constructively. Much of this starts with our own individual and organizational inclinations around conflict: from how we react to hearing or reading the word itself to how we typically navigate conflicts that arise in our lives.

In our work in coalitions, we can explore conflict resolution in a number of ways:

**Assume conflict (and our reaction to it). While we may inherently deal with conflict in our own way,** many people (and organizations) rarely take the time to investigate their own understanding and handling of conflict. From acknowledging and planning for conflict, to how we hear the word and what it means to us, to the way we wind up eventually behaving when conflicts arise...being transparent with ourselves and those we are working in coalition with is core to successfully navigating challenges.

**Ask if there IS a conflict. Even if we don't plan for conflict, it has plans for us. Our reaction to conflict** also might dictate what we see as a conflict. In coalitions, something we might identify as a conflict is actually an opportunity to reframe our choices or practice “both/and” thinking. We also must acknowledge that decision making in a coalition or network differs from that in an organization: in collaborative pursuits, we strive for a shared vision yet don't all need to be on the same page to work in symphony together. Different approaches and actions can help realize a common vision or goal.

**Allow for conflict. Conflict isn't the same as difference, though it might illustrate where our** differences lie and what bridges we might build (or agreements we might create) to forge connections and/or allow for these differences to leverage collective impact. Conflict is challenging, but shouldn't be ascribed a value judgement of “bad”.

**Address conflict collectively and creatively. Coalitions must be open about conflict and the ways they** propose handling it. There should be a structure—even if a few simple steps—that can be used when a conflict arises. Do coalition members check in with a staff person or Executive Committee member first? Can the conflict be resolved among a few parties, or is the entire coalition required? Is there time for an ad hoc meeting or call on the topic? Are there ways to integrate differing perspectives, spread decisions

out over time, or come up with a new idea? How do we protect trust and relationships moving into, through, and past conflict?

Coalitions that concoct lasting relationships and impacts have not done so because they avoided conflict, but because they embraced it and saw it as an opportunity for transformation.



### TRY THIS

*Chocolate-Vanilla-Strawberry.* There are many choices we can make. Among the most important may be dessert. Take the traditional ice cream trifecta of chocolate-vanilla-strawberry and choose one (this is why Neapolitan ice cream was created). It may be an easy choice for you, but then think about making this decision with even one other person. In a coalition, there are likely to be at least a half dozen others...



Conflict resolution and transformation is not a choice between “flavors” (as it is often posed), but an opportunity to learn about and reframe why you are making a choice. What’s most important given your coalition’s vision? Is this even the set of choices you want? Is there a way that different coalition members can choose their favorite and “some of each” is an option...or the coalition equivalent of Neapolitan ice cream? Take a coalition conflict you are or have been experiencing and brainstorm potential solutions—individually or as a coalition—that might involve sharing, combining, or creating new options entirely.

## Self care

To sustain the vitality to function in a high-demand, fast-paced environment all leaders need to create ways to take care of ourselves and coalitions need to create ways we take care of one another. Social transformation is challenging, long-haul work and it’s easy to burn out and lose our way. What’s more, we not only have to pay attention to our own individual and coalition needs, but the impact that social and political circumstances may have on us and our prospects of success.



The Zen priest and social activist Norma Wong talks about the need to rest together if we are to make music together. This could easily be transposed to the cooking metaphor serving as our foundation—it’s all the same creative process and we need to take time both apart from our work AND as part of our work to rest, heal, reflect, and renew. It is perhaps one of the most counter-cultural practices (and the most impactful) that shape the lasting changes many working in coalitions are committed to creating.

We are all involved in work to change the world—at least in part—because of our desire to heal our communities, the policies that shape them, and the system that influences actions every day that can create connection or undermine our work. At the core of this work (and at the core of imagining and creating great food) is love. Self-care is a demonstration of love in both a personal and professional context...not as something overly sentimental or romantic, but as a commitment to being our best selves, doing all we can to connect with those we work with and serve, and as a prerequisite to doing the most transformative and healing work possible.



### TRY THIS

*Self-Care Salad Bar.* An important part of self-care (and taking care of others) in our work is knowing and asking for what you need personally...and this also applies to organizations within a coalition.



Think about the top three practices or needs you have individually and organizationally and list them. Then take some time at an upcoming coalition meeting to share what these are...it's a healthy way to declare what you do to take care of yourself and your organization and can spark a conversation about what practices might be considered for your coalition. What's more, these are the kinds of conversations that build relationships and trust (both important parts of self-care!).



## Leadership

**Get your creative juices flowing with this thought piece on incorporating system leadership into our work from SSIR**

**Lead through centering equity by incorporating these Racial Equity Tools or think specifically about the process of changing leadership.**

**Feeling unaligned? Read this step by step guide to creating the conditions for alignment within a group from the Social Transformation Project**

**Mix it up by supporting experimentation in your coalition to come up with new ways of working together**



## Decision making and governance



Continue using the **MOCHA** (Manager, Owner, Consulted, Helper(s), Approver) model from the last chapter to transform accountability into decision making

Learn more about **Holocracy**, a new way of structuring organizations that has changed how Compass Point works

If you already have decision making procedures within your coalition, check out **Loomio**, an online tool for making decisions in a group.



### **Conflict Resolution/Transformation**

**Resolve your conflicts creatively** with this toolset by Dig In



### **Self-care**

Want to incorporate more self-care practices into your life? Get going with this **21 day challenge guide**.

Check out Compass Point's **12 Resources for Your Self-Care Starter Kit**.

For more resources, tools, and articles related to “Chefs not Recipes” themes, **see the Flavors & Accompaniments section**.

## **Kitchen Etiquette: Information Sharing and Communications**

**In a coalition, individual and organizational leadership are collective, exemplified by how well information is shared and commonly understood.**

**Setting up simple systems and agreements for what information is exchanged, when/how often, and on which platforms is essential.**

**External communications capacity is built on a firm foundation of clear coalition vision, scope, and established internal information sharing practices.**

## **Coalition Information Sharing: Form Follows Function**

The structure and flow of information in a coalition is based on strong shared leadership and an understanding of coalition vision and scope. Successful coalitions require well-defined structures for governance and decision making, complemented by a system that supports information sharing. Typically, this requires the following types of decisions:

**Important Information. Discussing WHAT it is that needs to be shared is a first step in understanding** what kinds of information are important to all coalition members. Clarifying the scope of the coalition helps to identify what information is helpful both within and outside of coalition boundaries. Information regarding specific coalition projects/initiatives should be shared regularly, complemented by related information from other organizations, coalitions, or in the broader landscape that might affect coalition work.

**Communication channels. HOW and WHEN you share information depends upon coalition culture and preference.** Monthly calls or meetings are fairly common, other than coalitions where there is substantial work done at the working group/project team level, which might enable less frequent coalition-wide calls or meetings. Meetings or calls should be complemented by a listserv (see below) to share follow-up and additional information (and enable members to share with one another). Ad hoc calls or meetings, or “rapid response” meetings might also be occasional structures used to explore an issue in greater depth or with a quicker turnaround.

**Tools. Every coalition should have a basic “toolkit” and set of guidelines for using it. Greater** transparency and accessibility is a promising practice, allowing for shared leadership rather than a single organization or small group prompting all communication sharing. Toolkit components might include a listserv (rather than an e-mail list, which tends to promote “hub and spoke” information sharing, and can be clunky and clog inboxes), a coalition roster with contact information, and an online repository for sharing files (from meeting notes and draft documents for reference to articles and resources related to the coalition’s work).



#### TRY THIS

*Coalition ‘Foursquare’.* Like a baking mold for a particular shape of cake or cookie, the information sharing structures for your coalition determine the form it takes based on the needs of the group.



Create quadrants where the upper left is the type of information your coalition must share, the upper right are the structures you use to communicate, the lower right are the frequencies for each communication channel and the lower left are the tools you use to structure your information sharing.

<i>Information to be Shared</i>	<i>Channels/Types</i>
Projects	Meetings
Funding Opps	Calls
Policy Developments	Listserv
Internal Coalition Updates	Newsletter

  

<i>Tools to Use</i>	<i>Communication Calendar</i>
Listserv	Monthly (meetings)
Roster	Monthly (calls for working groups)
Google Drive	As needed (listserv)
	Quarterly (Newsletter)

## Guidelines for Information Sharing and Engagement

In any collaborative effort, information sharing and consistent engagement are part of the culture. Staying apprised of coalition activities and individual partner work—not to mention taking time to discuss developments in the broader landscape—is important to do in a way that is accessible and not overwhelming.

Given the volume of information most coalition members carry, these are a few ingredients for developing a successful culture around information exchange:

**Boundaries. As part of coalition principles, setting clear values and boundaries for information**

sharing is helpful in understanding the type of information, frequency, and method that will work for all members.

**Transparency. In both coalitions and networks, trust is built and maintained when information (even**

down to budget and funding allocations) is shared openly. Finding graceful ways to do this is helpful in person, on calls, and in shared documents.

**Meaningful Meetings. Each meeting or call should have a clear agenda that covers the information**

partners are interested in while allowing time for discussion and minimizing pure “updates” (which are

important, but can happen in a separate pre- or post-meeting update). A facilitator should develop the agenda in consultation with members and notes should be kept for each meeting in a document accessible to all. Ideally, whether consistent or rotating, facilitation and notetaking should be assigned/understood before each meeting or call.

**Follow-up (and follow-through). Accountability is one of the key factors in coalition success, and** clarifying who will follow-up on a particular item (and by when) should happen at the conclusion of every individual, small group, and coalition-wide conversation or meeting. Follow-up creates certainty and follow-through creates trust.

**Information sharing is not communications. It's important to distinguish internal coalition** information sharing and external-facing communications and the systems required to support both. There is a connection between the two in some of the information shared, but they differ in terms of the framing and tools used for each.

**Engagement. Information sharing should always prioritize engagement—of current coalition** members and for potential new members or allies. What impact does this have for those already participating and who else might need to be consulted or coordinated with?

## Coalition Communications and Branding

As important as (and built upon) how a coalition arranges information sharing among its members is the approach taken to communicating externally: identifiers such as name and logo, stories and messages shared, tools and documents developed and disseminated, and the avenues used for such communication.

Coalition communications benefit from:

**Name. Having a catchy name that identifies your coalition and describes what you do can help attract** attention and allows both members and others to easily refer to the coalition's work. (e.g. MMAHEN, the Minnesota Multifamily Affordable Housing Energy Network, lovingly pronounced "Mama Hen")

**Logo. While not a requirement for a successful coalition, having a simple logo of some kind to identify** your collective effort can help support communications. These logos are often complemented by the logos of all of the member/partner organizations for additional impact, illustrating the groups that have come together under a single banner.

**Two-Pager. Developing a two-pager that can be shared both with members of the coalition and with** others (including being posted on-line/as the basis for a simple website) is one of the easiest ways to share why you are working together and the outcomes you expect. The two-pager should include a coalition's vision, mission, values/principles, membership, and main focus.

**Talking Points. It is important to have a coalition discussion around talking points for how and what is** communicated under the coalition's name—including using the name itself and the logo. In addition to the

two-pager describing the coalition’s work and membership, an internal two-pager should outline talking points about the coalition and guidelines for when and how coalition work is communicated.

**Stories, Messages, Tools. Developing specific pieces that share the coalition’s**

story/accomplishments—or stories/wins of individual members in the context of the coalition’s work—messaging on a particular issue, or case studies or tools the coalition has developed are wonderful ways to communicate the value and results of your work together.

**Audiences and Avenues. Deciding whom you want to develop communications for—the general public,**

decision makers, a particular constituency, a specific geography—helps determine the best structure for that communication and avenues for sharing what you have designed: whether a targeted mailing/e-mail blast, a neighborhood event, offering comments at city council, an agency/decision maker briefing, a demonstration, a press conference, or a social media campaign.



**To brand or not to brand? Read [this SSIR thought piece](#) on the role of brand for nonprofits.**

For more resources, tools, and articles on Kitchen Etiquette themes, [see the Flavors & Accompaniments section](#).

## Sharing the Meal: More on Membership

**Coalitions are structured to allow inclusion and shared responsibility in a variety of ways—both among “members” and as part of a broader network of individuals, organizations, and other coalitions.**

**It is important to clearly define membership, yet allow for permeability in terms of participation and information exchange.**

**Coalitions can be structured as one table or many adjacent tables to allow for a balance of inclusion and moving work toward results.**

**Coalitions focused on social transformation always blend advocacy and education in their work.**

## Who’s “at the table”?

We often talk—in kitchens and in coalitions—about who’s “at the table”: we want a place for everyone to share the meal. Who is at the table is determined by both the size of the table and the “invitation list” reflecting what perspectives and constituencies your coalition (or dinner party) ultimately reflects.

In addition to balancing disciplinary focus and expertise—around issues of housing, the environment, workforce development, etc.), coalitions that address issues of social and racial equity (in community and

policy transformation work, we believe this means every coalition), need to find ways to authentically engage members who represent communities being served by the coalition.

Equity is (or should be) “baked in” at the very start, and while coalitions can change to add members (this is addressed in more depth below), the values and orientation of a coalition are often set by initial participants.

## Determining types of membership

Coalitions can range in size and membership based upon need—from small associations of 3-4 groups comprising a coalition to membership in the double digits—each of which requires a particular structure and delineation of what is required of members. In most cases, coalitions should outline criteria for membership (how does one become a member) and expectations of members (what do members do as part of the coalition). Some examples of this include:

Membership Criteria	Expectations/Role
<p><b>Alignment</b></p> <p>(with values, vision, mission)</p>	<p><b>Participate in Framing Coalition Strategy</b></p>
<p><b>Contribution to Diversity</b> (of topic/constituency)</p>	<p><b>Lead/Engage in Coalition Objectives and Work Areas</b></p>
<p><b>Complementary Methodology</b> (e.g. advocacy, legal, education, technical/research, community engagement)</p>	<p><b>Delineate and Agree to Specific Contribution</b></p>
<p><b>Relationships/Influence</b></p>	<p><b>Utilize Relationships to Advance Goals</b></p>
<p><b>Capacity</b> (to participate in a coalition—inclination, staff contribution, funding)</p>	<p><b>Collaborate</b> (via mindset, participation in meetings, coalition governance)</p>

Coalition membership is fundamentally about individuals and organizations working together to both develop a shared understanding of the issues and alignment around an approach, while also fostering productive tension, learning, and new strategies by valuing and tolerating differences that exist and arise.



### TRY THIS

*Coalition capacity and asset mapping.* Determining coalition membership is much like menu planning—there are some basic guidelines (appetizer-main-dessert-beverage), yet it is ultimately about the



creativity and appetite of those developing the menu.



## Turning up the Heat: Campaign Planning

**Create a living planning document that is thorough, yet flexible enough to adapt to a changing environment**

**Carve out time to review the campaign plan regularly – track performance, brainstorm new ideas, adjust as necessary**

**Ensure diverse perspectives are included during the creation of a new campaign to capture the best of the organization’s collective expertise**

## What Do We Need to Succeed?

One item that many team members don’t spend enough time on but makes an enormous difference in an organization’s success is campaign planning. Think about the steps taken towards the creation of a great Thanksgiving meal or other large family dinner.

Usually, someone knows the favorite dishes of those attending to ensure that they’ll be served at the meal. A family member makes a grocery list and heads off to the store to round up the necessities. Often, last minute drink or food requests are made and repeated trips to the store are in order. Understanding your existing organizational resources and acquiring new, necessary pieces are crucial elements for successful campaigns.



### *TRY THIS*

**Power Mapping.** Research is key! To move a target that is central to your organization’s campaign, one must understand what motivates the target and who influences him or her. Who is the ultimate decision-maker? In campaign language, this person is often referred to as the target, and it’s always an individual or a few individuals (in the case of a Public Utility Commission, for example), not an institution. Who has good relationships with your target? In campaign language these are often referred to as secondary targets. Does your target rely on the opinion or expertise of other important figures or organizations? Do you have relationships with anyone who has influence over your target?

Map these influencers on a grid, including these two metrics:

**Those who strongly oppose your position to strongly support your position (x-axis), and**

**Those who have the most influence in terms of power to those who have the least influence in terms of power (y-axis)**

The results of this analysis will help you to select targets and secondary targets. This should also help clarify whether you need to recruit new coalition members, to work with new allies and to be aware of opponents (and yes there often will be opposition, and it's important to be very familiar with those players too).



## Meal Prep: Prepare to Plan

A quote attributed to Albert Einstein reads: *‘If I had an hour to solve a problem, I would spend 55 minutes thinking about the problem and 5 minutes thinking about solutions.’* Once you have assembled all your ingredients in the kitchen, it's time to make a game plan.

What tools do you need for your meal to be successful? How long will each dish need to cook? Do you have time and space to prepare and cook your dishes all at once, or do you need to prioritize? The key to a successful meal relies on good meal prep and planning. These are also important aspects of any successful campaign plan.

**Summary. Briefly describe the campaign and the desired objectives.**

**Win. Which objectives, if met, would constitute a “win” for this campaign?**

**S.M.A.R.T. Goals. Ensure that your campaign objectives are SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.**

**Strategies. What methods will you pursue towards achieving your goals? This section may include a list of specific tactics to accompany these strategies.**

**Campaign Phases. Will your campaign need to pursue “mini-campaigns” to execute more than one strategy within the larger campaign to achieve success? How do they flow from each other through different aspects of the campaign? Also, identify any intervening circumstances, key dates or other events that will affect the outcome of your campaign.**

**Tactical Calendar. Identify key tactics that will be used at different points in the campaign and place them on a calendar to keep the campaign on the path of meeting its goals.**

**Budget. Conduct an analysis of your existing resources to ensure that the campaign can be met. This** is obviously best done first before the marshalling of any resources. And remember to note – if a tactic, strategy or goal is important enough – if you need to seek out more funding in order to succeed.

You can find a good [template of a campaign plan here](#).

## Taste-Testing

Are you sure that your well-thought-out recipe will yield good results in the end? Like any top chef in the kitchen, organizations need to get a good “taste” of their work. Does your meal need more ingredients? Perhaps you need to re-direct organizational resources. Do you need to adjust the temperature? Perhaps your campaign needs to “turn up the heat” on a target or even “cool down” your tactics to allow matters to simmer. Good campaign planners dedicate time (at least an hour weekly, bi-weekly, or monthly) to monitor progress.

## Improving the Recipe

We all make mistakes, and when organizing a campaign it’s important to learn from them. What tactics worked well? Which ones didn’t? Were you missing some important allies or messengers who could have helped you succeed? Did you run shy of resources? Smart organizers work with the coalition to learn and to develop and grow accordingly, for example by enrolling new coalition members and setting aside tactics which aren’t a good fit for your efforts.

## Expanding the Pie, Connecting the Tables: Building Connections Beyond Your Coalition

### Top Tips: Expanding the Pie, Connecting the Tables

### Flavors and Accompaniments: Resources and Reading Room

### Flavors and Accompaniments

In each section we've included the cream of the crop – the most actionable resources (shown in bold below). Here we include a fuller list with more food-for-thought-type articles, as well as actionable plans, toolkits, and a few books.

## “Cooking Up” Coalitions

Consider [this sample commitment letter](#) for coalition members to sign on to when joining.

Look through La Piana Consulting's [collaborative map](#) that highlights different ways organizations can work together to get your collaborative juices flowing.

Still confused about structure? Read [a short piece](#) on the difference between coalitions, collaboratives, and networks.

The Foundation Center gathered some experts and compiled [5 factors that make collaborations work](#), have a looksee.

Are you and your organization ready to work in a more networked way? Check with [Rockefeller Foundation's 4 principles](#).

Get inspired by some exemplary [catalytic collaborators](#) who are changing how organizations work together.

Read through [this article in Nonprofit Quarterly](#) by the Management Assistance Group for a very clear explication of the culture required to support successful movement networks.

For some foundational information on how networks support scale, read [this briefing paper](#) by Grantmakers for Effective Organizations.

Network Impact has compiled [many tools and resources for network development](#) that may be of use in different phases of coalition building.

For a general understanding and argument for network and coalition development, we recommend the book [Connecting to Change the World](#) by Madeleine Taylor and Peter Plastrik. It's related to their online resource, the [Net Gains Handbook](#).

## Key Ingredients

### Membership Guidelines

Use [this list of questions](#) as a starting point when developing membership guidelines, from The Hospice of the Florida Suncoast.

Here are two examples of membership guidelines from the [National Coalition to Prevent Child Sexual Abuse and Exploitation](#) and the [Women's High Tech Coalition](#).

## Membership, Equity, and Inclusion

**Assess and facilitate issues of oppression, exclusion and inequality with [Social Transformation Project's Tools for Equity and Inclusion](#)**

**Use [Racial Equity Tools](#) to plan on centering equity.**

**Read this [thought provoking piece](#) on the potential pitfalls of inclusion.**

**If you want even more, check out Compass Point's [curated list of 15 Tools, Frameworks, and Resource that Challenge Racism](#).**

## Developing shared goals and principles

**Try out some [Bebopping to build trust and communication](#).**

## Choosing the Right Recipe for You

**Get started with [a work plan template](#).**

**If it's applicable, consider using a collaborative project management tool like [Trello](#) to get started working together.** For more information on what “applicable” means, see the technology section of Kitchen Etiquette.

**Take the next step with a [SOAR](#) (Strengths, Opportunities, Aspirations, and Results) analysis to understand how your work will connect to what's already happening in the world.**

**Start thinking about how accountability will work with group decisions with a [MOCHA](#) (Manager, Owner, Consulted, Helper(s), Approver) model.**

## “Chefs, Not Recipes”

### Leadership

**Get your creative juices flowing with [this thought piece](#) on incorporating system leadership into our work from SSIR.**

**Lead with equitable leadership development by incorporating these Racial Equity Tools.**

**Feeling unaligned? Read [this step by step guide](#) to creating the conditions for alignment within a group from the Social Transformation Project**

**[Mix it up by supporting experimentation](#) in your coalition to come up with new ways of working together.**

**For a deep dive, consider reading June Holley's [Network Weaving Handbook](#), which outlines behaviors and mindsets for building strong relationships in networks.**

Here are some tips on [supporting and learning from experimentation](#) as a leader in your coalition.

Try out [a toolkit](#) from the Social Transformation Project on creating a culture of feedback in your work.

## Decision making and governance

Continue using the [MOCHA](#) (Manager, Owner, Consulted, Helper(s), Approver) model from the last chapter to transform accountability into decision making.

Or use the original model, [DARCI](#) (Decider, Accountable, Responsible, Consulted, Informed).

Learn more about [Holocracy](#), a new way of structuring organizations that has changed how Compass Point works.

If you already have decision making procedures within your coalition, check out [Loomio](#), an online tool for making decisions in a group.

Watch [a short video introduction](#) to the idea of circles and teal organizations, abstracted from the book [Reinventing Organizations](#) by Frederic Laloux.

Peruse the facilitation techniques of [Liberating Structures](#) to support your decision making and governance processes.

## Conflict Resolution/Transformation

[Resolve your conflicts creatively](#) with this toolset by Dig In.

## Self-care

Want to incorporate more self-care practices into your life? Get going with this [21 day challenge guide](#).

Deepen these practices through perusing the Move to End Violence network's tools for [Self Care for Sustainability and Impact](#).

Consider embedding [the practices of Forward Stance](#) in your organization, coalition, or meetings.

Check out Compass Point's [12 Resources for Your Self-Care Starter Kit](#).

Read Beth Kanter's [blog posts on self-care](#) or purchase her book called [The Happy Healthy Nonprofit](#).

Sign the pledge to [#LeadWithLove](#) and incorporate these values into your work.

Change your ideas about self-care to include discipline and practice with [this article](#) from Compass Point.



# Kitchen Etiquette

**To brand or not to brand? Read [this SSIR thought piece](#) on the role of brand for nonprofits.**

**Borrowing from the corporate sector, here's an idea called minimum viable brand – the very least you need to get by. Read an [article](#) or get started with [a brainstorming canvas](#).**

## Technology: Getting Started

**Use the Monitor Institute's [framework](#) to think through the process and plan information exchange within your coalition.**

**Start with NTEN's – the Nonprofit Technology Network's – [knowledgebase](#).**

**Check out Aspiration Tech's [manifesto for nonprofit technology use](#) and consider adopting these values for your coalition.**

**The Foundation Center and Monitor Institute teamed up to compile [a guide](#) to help you select appropriate collaborative technologies.**

## Technology: Beyond the Basics

**Follow the [Electronic Frontier Alliance](#), which regularly published useful tools and resources for digital security.**

**NTEN collected [some very specific case studies](#) for reaching people who are excluded from digital technologies.**

**Learn more about [how to use data to affect the sector](#) – this is not necessarily communications technology but may be relevant for this work.**

# Sharing the Meal

## Expanding the Pie, Connecting the Tables

### Coalition/Network Health, Vitality, and Evaluation

**Take [a quick assessment](#) to evaluate your network's (or coalition's) evolution.**

**Use [this Network Diagnostic Tool](#) from the Monitor Institute to understand where your coalition's strengths and areas for improvement.**

**Deepen your knowledge with Network Impact's [resources on network evaluation](#).**