



END CORPORATE RULE. LEGALIZE DEMOCRACY.

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Welcome!

**Local Action Webinar:
Building & Maintaining Coalitions**

August 2, 2011

The webinar will begin in a few moments.

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Webinar Orientation & Participation Tips

- **Participant list:** On the left - see who else is here.
- **Maximize screen:** To get the best view of the presentation.
- **Questions:** Questions will be answered at the end, but you can type them anytime in the chat bar at the bottom.
- If you have **any technical difficulties** viewing the webinar, type your question using the chat bar. If that isn't enough, please e-mail support at support@anymeeting.com



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Announcements

- Affiliate with Move to Amend!
 - Information: <http://MovetoAmend.org/affiliate>
- Democracy Convention + Affiliate Meeting, August 24-28 in Madison, WI
 - Register for the Democracy Convention: <http://democracyconvention.org>
 - Make sure to register for the Affiliate Meeting too! <http://movetoamend.org/register-affiliate-gathering-august-2011>

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We the People of the United States
insure domestic Tranquility, provide for the common defence, promote the ge-
neral Welfare, secure the Blessings of Liberty to ourselves and our Posterity, do hereby
convene and establish this Constitution for the United States

Agenda Overview

1. Coalition basics
2. Advantages & disadvantages of coalitions
3. When a coalition is appropriate
4. Questions to ask before forming a coalition
5. How to form a coalition
6. How to maintain a coalition
7. Challenges of coalitions & suggested solutions
8. Tips on reaching out to specific types of groups
9. Further reading



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Coalition Basics

- Coalition = Multiple groups that come together to work on issue of common interest
 - May also include key individuals
- Duration
 - Short-term: Formed to work on a single event or short-term campaign, or to fight against an immediate threat
 - Examples: To organize a rally, to pass a referendum
 - Long-term: Ongoing collaboration
 - Examples: MTA national org, MTA state chapters (in the future)

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Advantages of Coalitions

- Achieve more!
 - Power in numbers
- Different groups bring different things to the table
 - Volunteers, funding, meeting spaces, personal connections, experience/expertise, different perspectives
- Reach diverse constituencies
- Develop trust, break down stereotypes
- Harmonize messages, coordinate efforts/tactics
- Increased social influence & political clout

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Disadvantages of Coalitions

- Take work to form & maintain!
- Sharing responsibilities & power can be challenging
- Less time for non-coalition work
- Different organizational structures & cultures can create friction
 - As can existing histories between organizations



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When is a Coalition Appropriate?

- When groups share a common interest
- When groups are willing to work together
- When an issue is too big for one group to handle
- When what you can accomplish together is worth the work of forming & maintaining the coalition



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Questions to Ask Before Forming a Coalition

- What do you hope to accomplish?
 - What is your goal?
 - What skills, resources, etc. are needed to achieve it?
 - Is a coalition the best way to do this?
- Is your group organized enough to start a coalition?
 - Get yourselves organized before reaching further
- Do you have the time & resources to devote to building/maintaining a coalition?



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Getting Started

- Clearly articulate the problem, & how you think a coalition could help address it
- Clearly articulate your expectations
 - Would this be a short-term or long-term effort?
 - What would its geographic scope be?
- Put together a core group for initial planning
 - Could be a committee of your group (could also include individuals from other groups)
 - Should include group leadership
 - Helpful to include well-connected individuals

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Getting Started

- Identify potential coalition members
 - Which groups have obvious common interests? (e.g. pro-democracy groups, election reform groups)
 - Which have common interests that may be less obvious? (e.g. small businesses, labor unions, environmental groups, religious organizations, students)
- Consider breadth of interests among groups
 - Broader is more powerful, but harder to form/maintain
- Consider diversity among groups
 - Race/ethnicity, socioeconomic, geographic, age, etc.

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Getting Started

- Do your homework
 - What issues does each group focus on? What is its mission?
 - How does this relate to your coalition's focus?
 - What is the group's history? Geographic scope?
 - Who are its current leaders? What is their contact information?
- Assess your list of groups
 - Are any of these groups essential? If so, plan to devote more energy to reaching out to them



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Reaching out to Groups

- Identify people in your group with personal relationships with other groups, & enlist their help
 - These connections are very valuable - use them!
- Decide in what order to contact groups
 - Earlier joiners may determine later joiners
 - Prioritize diversity from the beginning
 - Enlist the help of earlier joiners to recruit others
 - Contact any “essential” groups first
 - Let them know that you believe their participation is very important

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Reaching out to Groups

- Do initial outreach in a way that is culturally and organizationally appropriate. For example:
 - Send an email, follow up with a phone call
 - Send a formal letter, follow up with a phone call
 - Arrange a personal visit with a group leader
 - In some cases, it may be important to spend time getting to know each other before getting to business (& maybe more than one meeting)



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Reaching out to Groups

- Explain clearly why you are forming a coalition, and why you believe it is in the group's interest to join
- Invite the group to send reps to an initial meeting
 - Can be a conference call/video conference if long distance
 - Can poll groups to find a time that works for most
- Follow up before the initial meeting to confirm participation



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Initial Meeting

- Plan well
 - This meeting sets the stage for future success (or lack thereof)
 - Don't just get everyone in a room and expect things to magically come together!
- Pick a talented and experienced facilitator
- Draft the agenda with care
 - Identify substantive decisions to make as a group
- Respect people's time
 - Include time limits on agenda items
 - Keep the meeting short (an hour - or hour and a half max)



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Initial Meeting

- Make it pleasant
 - Choose a comfortable and convenient location
 - Offer refreshments
- Help people get to know each other and begin building trust
 - Include time for introductions
 - Consider using icebreakers
- Articulate a vision
 - Remind people why they are at the initial meeting
 - Inspire! Get people excited and optimistic about shared work

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Initial Meeting

- Make substantive decisions
 - It's important to accomplish things by the end of the initial meeting, so that people will come back
 - Makes clear that decision-making power will be shared
- Ask participants to take on specific commitments
 - Either individually or as part of working groups
- Decide when to hold the next meeting
 - Or decide on a regular meeting schedule



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Important Early Discussions/Decisions

- Come to a shared understanding of the problem or issue
- Identify common interests and shared values
- Identify questions & concerns, and discuss them
- Come to a shared understanding of the function of the coalition
- Identify desired outcomes and specific goals
- Assess resources within the group
 - Identify likely needs for additional resources
- Write down what you decide
 - Develop vision and mission statements
 - Create an action plan

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Important Early Discussions/Decisions

- Decide on a decision-making structure
 - Short-term coalitions may operate in a loose, informal way, but longer-term coalitions generally benefit from more structure
 - Questions to consider
 - How is membership in the coalition decided? What are the criteria? Rights? Responsibilities?
 - Will there be a steering committee? How will it be chosen? Who will chair it?
 - Will there be officers? How will these be chosen?
 - Will there be committees? Who will chair them?
- Write down what you decide
 - E.g. constitution, bylaws

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After the Initial Meeting

- Coordination is essential when forming a coalition!
- Follow up with participants
 - Distribute notes, & remind people about next meeting
 - Reach out to anyone invited who didn't come
- Follow up with committees/work groups
 - The real work of the coalition will probably happen here - so worth spending some energy on them
 - Check in with them, help populate them
- Make sure next meeting scheduled & logistics handled

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Maintaining a Coalition

- Doesn't happen automatically - takes work!
- Similar in some ways to maintaining any org
 - Success is motivating
 - Bite off reasonable chunks at reasonable intervals
 - Celebrate victories!
 - Recognize contributions, & thank people
 - Make meetings and coalition events enjoyable
 - E.g. by including trainings/presentations, providing refreshments, scheduling social time after meetings, etc.

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Maintaining a Coalition

- Similar to maintaining any org (cont.)
 - Increase benefits of participation, decrease costs
 - Include substantive decisions in all meetings
 - Help people get to know each other & build trust
 - Make meeting spaces convenient, comfortable & accessible
 - Remind people of upcoming meetings
 - Work to maintain a positive culture
 - Learn & practice anti-oppression
 - Learn to respect and value differences
 - Learn to agree to disagree
 - Proactively address negative situations (disrespect, bullying, interpersonal conflicts)

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Maintaining a Coalition

- But also different than other orgs
 - Develop multiple contact points
 - Good to have same reps attend meetings for consistency, but encourage other members to get to know each other
 - Encourage organizations to reach out to others in coalition for help on their own campaigns
 - Anticipate challenges to the coalition and identify solutions
 - A discussion early on can help avoid later problems
 - Be on the lookout for possible new coalition members
 - When new members join, make sure to treat them as equals
 - If coalition is dispersed and relies mainly on conference calls or videoconferences, try to schedule one or more face-to-face meetings each year



Maintaining a Coalition

- Periodic review
 - Can help identify problems & opportunities for improvement
 - Use for reflection, evaluation, to identify needed changes in direction, procedure or mission
 - Internal vs. led by someone outside your group
 - Aim to hold at least yearly (more frequently when launching a new coalition)
 - Can make this fun (a potluck, retreat, etc.)
 - So doubles as a social/bonding opportunity



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Dealing with Attrition

- Like with any group, some participants will drop out
- Follow up with groups that stop attending
 - Ask them why not participating
- Sometimes withdrawal is fine (e.g. because their interests are not served by the coalition)
 - If so, thank them for participating, and let them know that you hope to work together in the future
- Sometimes withdrawal is due to problems
 - Identify these and try to address them



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Challenges of Coalitions

- Turf battles
 - Groups can be uneasy about sharing issues, target populations, and funding
 - **Potential solution:** Identify how benefits of joining the coalition trump the disadvantages for the organization
- Negative histories between organizations
 - Can result from turf battles, interpersonal conflicts, or misunderstandings that were never corrected
 - **Potential solution:** Talk to both sides, identify the sources of friction, solicit potential solutions, mediate between parties



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Challenges of Coalitions

- Some groups able to contribute more than others
 - Should this lead to greater decision-making power in the coalition?
 - If yes, the less powerful groups may be unhappy
 - If no, the more powerful may be unhappy
 - **Potential solution:** Discuss this situation early on, when you are deciding rights & responsibilities of membership. Use an inclusive, democratic process to come to a solution that is acceptable to everyone.



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Challenges of Coalitions

- Friction from different organizational structures & cultures
 - E.g. Prioritizing efficiency vs. fuller discussion, disagreement over using Robert's Rules vs. consensus
 - **Potential solutions:**
 - When deciding operational procedure early on, use an inclusive, democratic process to increase buy-in & support.
 - If friction arises, identify the problem. Ask different individuals how they conduct affairs in their own organization, and what they like and don't like about how the coalition is operating. Ask them to focus their remarks/criticisms on procedure, not individuals. Take time to discuss potential solutions.



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Challenges of Coalitions

- Some individuals/organizations see themselves as the experts, and may try to dominate decision making
 - Can discourage others from contributing, & create unhealthy dynamics
 - **Potential solutions:**
 - Manage in a way respectful to everyone. Recognize contributions, but also provide support & encouragement for those with less power (i.e. proactively seek their input, provide guidance in unfamiliar procedures such as Robert's Rules, etc.)
 - If needed, take the self-proclaimed “experts” aside. Phrase suggestions in a positive way (“your expertise is really an asset to this coalition, so I’d like your help in making sure that everyone is contributing to the discussion...”)

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General Tips for Outreach to Groups

- Ideally done by a member of that group (but if not possible, ok)
- In some cases, best to meet first to start developing a relationship before ask to join coalition
 - E.g. minority, environmental, or other groups with less political culture
 - Ask to meet to talk about mutual interests, & how can work together
 - Can give eventual goal of coalition as concrete reason
 - Come prepared, know what your goals are, be professional
 - Don't bring too many people from your group (1-3)
 - Good to do this well before you want their help (e.g. with a resolution campaign), though you can let them know your plans for the future
- Ask existing members to help with further outreach

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Tips for Outreach: Minority Communities

- Make sure to do this from the beginning, not as an afterthought
- Important to show respect & build trust
 - Nurture personal relationships
 - Be sensitive to different ways of doing things - don't assume that what comes naturally to you is the best or only way
- Communicate that you are interested in working together as equal partners
 - Not “we want to add you to our coalition”



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Tips for Outreach: Minority Communities

- Recognize that these communities often most affected by abuses of corporate power
 - E.g. through voter suppression, pollution, poor nutrition, low wages, regressive taxes
- Can also explain how corporations usurped the 14th Amendment to serve their own interests
- Members of these communities often understand the importance of MTA issues better than others
 - May become some of your most committed allies
 - However, realize that these groups may be stretched for resources, or committed to addressing immediate needs of their communities

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Tips for Outreach: Groups with Different Political Leanings

- Explain importance in terms of shared values
 - E.g. democracy, fairness, freedom
 - Avoid partisan language
- Be friendly, & treat people as individuals
- Discuss value of working together
- Focus on core issues
 - If veer off topic, “agree to disagree” on other issues
 - Don’t take disagreement personally
 - Keep the relationship positive

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Tips for Outreach: Nonprofit Corporations

- Some may be wary of losing corporate personhood because think it benefits them
 - Most likely for large, established nonprofits
 - Note: Don't "preemptively" bring this up - many not worried
- If so, explain how net effect on nonprofits is negative
 - Increased influence of large for-profits at the expense of others
 - Pressure to spend scarce resources to keep up, but can't win
- Explain effects of excessive for-profit corporate power on nonprofit's constituencies/issues
 - E.g. pharmaceutical costs (seniors), predatory lending (low-income communities), fossil fuel subsidies (environment), etc.

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Tips for Outreach: Labor Organizations

- Some may believe that Citizens United benefits them
- If so, explain how net effect of Citizens United on unions/labor is negative
 - Increases corporate influence more than labor influence
 - Benefits large corporations at the expense of small businesses & workers
- To illustrate broader problem of corporate personhood
 - Under 4th Amendment, OSHA/EPA inspectors restricted
 - Corporations can bar you from organizing at work because of corp. personhood (reason that corp. property is a private place)

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Tips for Outreach: Student Groups

- On college campuses, approach student org leaders & ask to speak at a meeting
 - If possible have college students do this, or at least people roughly the same age as an average college student
- At high schools, more restrictions
 - Important for high school students to do outreach
- If you don't have members who are high school students
 - See if anyone has friends/family who are
 - Another idea ffer to do an educational presentation at a class, and then remain in contact with interested students

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Tips for Outreach: Communities of Faith

- Speak in terms of values and morals
- Government did not create our rights
 - Inalienable rights given by our Creator (Decl. of Ind.)
 - Government granting these rights to corporations is an abomination
- Helpful if a member of the organization does the initial approach
 - Even if leaders wary of working on MTA issues, one of their members may be able to form an internal committee or otherwise get the ball rolling

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Tips for Outreach: Small Businesses

- Explain how net effect of Citizens United & corp. personhood on small businesses is negative
 - Through political spending, large corporations win favors & special treatment that helps them outcompete small ones
 - Small businesses don't have the \$\$ to make large campaign contributions or hire full-time lobbyists, so their voices don't get heard
- Many communities want to help small businesses, but corporate personhood limits their ability to do so
 - Used to be able to give local businesses favorable tax treatment, but no longer can because considered "discrimination" under 14th Amendment

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Tips for Outreach: MTA Member Chapters

- Many national MTA coalition members have local chapters
 - Linked from MTA front page under “Organizations”
- When building your coalition, consider reaching out to these groups
 - Let them know that their parent org is a MTA member (they may not be aware of this)
- Also, try groups that are not MTA coalition members but that are likely allies
 - E.g. Common Cause, MoveOn, DFA, OFA, Libertarians, Dems

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Summary

- Coalitions are useful, but also take effort
- If decide to form a coalition, take care to launch it well & maintain it
- Some challenges of coalitions are familiar from our everyday organizations, some are not
- In the end, it comes down to organizing - working with people, paying attention to detail, and doing the work!



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Further Reading on Coalition Building

- BeyondIntractability.org
 - http://www.beyondintractability.org/essay/coalition_building/
- The Community Toolbox
 - http://ctb.ku.edu/en/tablecontents/sub_section_main_1057.aspx
- GSA Network
 - <http://www.gsanetwork.org/resources/coalition-building/coalition-building>
- Summit Health Institute for Research and Education:
 - http://www.shireinc.org/wp-content/files/Building_Coalitions_among_Communities_of_Color.pdf



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Final Notes

- **Complete the survey** at the end of this webinar (you will automatically be directed there after we end)
- **Next webinar:** First Tuesday of next month
 - Topic: Finances & Fundraising for MTA Affiliates
 - Tuesday, Sept. 6th at 4pm PT / 5pm MT / 6pm CT / 7pm ET
- **Contact Move to Amend** if you have any questions
 - info@MoveToAmend.org
 - (707) 269-0984