

# Coalition Management

## **Challenge: Getting—and Keeping—Key Stakeholders to the table as Part of a Statewide Asset-Policy Initiative**

*Do you need a coalition to advance a policy agenda? Who are the key stakeholders needed to be at the table?*

The participants agreed that whether a coalition was required depended on the policy agenda and the goals. Some coalitions seek diversity in the types of organizations or sectors that members represent; this is the case in Illinois. Another participant noted that legislators needed to know that the policies you are advocating come from the grassroots.

In other cases, individual groups take on an issue because a coalition would be either unmanageable or too resource-intensive. The participants agreed that the creation, structure, and management of coalitions were state-specific, depending on the political climate, legislative interest, and grassroots support.

For example, some organizations have people in the governor's office championing an idea and putting resources behind it.

Participants stated that coalitions were largely advocates and that there was a lack of service providers. Although convincing new members to be stakeholders is sometimes cumbersome, we must encourage new stakeholders at the table. One participant noted that there was no accountability for members to make progress and maintain the momentum of a successful first meeting or report.


Some participants noted that coalition members sometimes stayed focused on existing programs, such as IDAs, and interest diminished when the coalition moved on to other or broader asset-building goals.

**“In Pennsylvania, getting people to the table is relatively easy because it’s the state and it’s easier to pull together a coalition.... The Cleveland Fed and the PAOFE website have been very helpful to get people together.”—René Bryce La-Porte**

Pennsylvania and California were two of the state groups with websites at the time of the meeting.

APIC manages a statewide initiative and formulates policy based on an IDA program. APIC has been successful in creating a strong task force but has had difficulty recruiting new people into leadership to broaden outreach.

**There is no one-size-fits-all approach to state asset policy work.**



*“How do we ‘sell’ what we’re doing and make it work?”*

The participants noted that removing the specific focus from areas such as IDAs has helped broaden the agenda. Using reports that frame asset building and show how policies and programs fit within the asset-building frame also increases awareness, understanding, and interest in broad asset building and coalitions. In Delaware the asset-building frame started with the broader discussion beyond IDAs to look at the state’s current efforts and what new policies would be meaningful to workers. Another participant noted that when the movement was steered toward asset building, people who were not necessarily typical allies came on board.

For state-asset coalition leaders who work in a distinct nonprofit organization, separating the nonprofit organization from the group or coalition working on the broad asset-building agenda is helpful. A coalition under a different name, with a different logo and branding, and a different website helps keep the conversation separate. One example is the separate website and logo of APIC and EARN, a nonprofit organization in California. Stephanie Upp suggested breaking the connection between APIC and EARN and the possibility of taking IDAs off the table to talk about something bigger.

In one state, groups of IDA providers, business leaders, and other members began with “what are we doing already,” then moved to “what would make a difference to, say, a poultry worker, etc.” In order to get an agenda together, they broke into subgroups where each group worked on an item on the agenda.

The challenge is how to steer policies that help support low-income families toward asset building.

“The state-asset policy work is integral to community work, but there are people who can come on board who believe in asset building but are not bleeding-heart liberals.”—Doug Hall

## **Look outside typical coalition members.**

## **Challenge: Keeping Key People Engaged (and the Momentum Going) over Time**

*How do you develop a clear, focused policy agenda with diverse interests at the table?*

Pennsylvania has an Office of Financial Education with a clear, focused agenda contained in a report from the governor. In other cases, participants noted that reports were produced but not often used. In California and Illinois, suggestions on the policy agenda have come from the community or grassroots level. In California the community makes suggestions or adjusts suggestions and becomes the community voice to the steering committee. The California participants noted that this new approach needed to be evaluated for timeliness and effectiveness.

*How do you deal with numerous, conflicting agendas and with tension among stakeholders?*

In Illinois the coalition did community-based focus groups to determine the one big priority area. At each legislative session the coalition creates a policy roster to follow bills that support IABG's seven asset-building priorities. Arkansas has limited its focus to three major issues.

California has key goals in place: legislative policy and changing public opinion.

However, communication challenges make changing public opinion difficult. California noted that the first step was to have a conversation to clarify the differences between services and assets. Because a broad-based coalition has not been successful there, the suggestion is to move toward fewer decisions.

## **Coalitions must find the balance between pure consensus-based decision making versus effectiveness and saving time.**

Pennsylvania suggested that the key to a successful coalition was independent funding.

Many participants noted that bringing in legislators was a delicate component of building constituency. Although having legislators and policymakers at the table can advance your policy agenda, some legislators are not as effective as others. Sometimes the most interested legislators are not necessarily in leadership roles or may not be reelected.

## Challenge: Managing Different Points of View Regarding Policy Priorities and Specific Policies and Tackling Tension

*Do you need a consensus at all times?*

A participant from Pennsylvania noted that having the governor on board and using all internal funds helped in building consensus. Other participants noted that consensus building had not worked in their states. All participants agreed that consensus was needed on the bigger vision—the broad asset-building agenda—but on a specific issue the need for consensus depended on the issue and the group or coalition supporting it.

All participants spoke of the challenge of having different points of view regarding policy priorities and specific policies. Many participants agreed that the most effective way to manage differences of opinion was to evaluate them on a case-by-case basis. Participants from Illinois said that the coalition did not endorse bills but rather only educated member organizations and noted whether the bill or policy supported or did not support IABG's priorities. Each member organization is allowed to choose whether to endorse and advocate specific policies of interest.

Doug Hall of Connecticut could relate to the “case-by-case” idea because of his own experience in an organization that has been around for ten years. Hall said: “If you have a bunch of folks who want to work together on one thing, bring them together and do the best job you can. Spend some time thinking of who you wish was there but wasn't. **But like a sports team coach—look around, see who you have, and do the best you can.**” Hall believes that smaller ad hoc groups, often funder-driven, can take away from the cohesiveness of efforts of larger groups.

In Illinois and California the coalitions have steering or coordinating committees, which take the recommendations of the members or subcommittees and then make the decisions. In Illinois the committees and the staff make suggestions and bring them to the coordinating committee.

The most effective way to manage the difference of opinion is to evaluate it on a

