



BLUEPRINT FOR A MULTIRACIAL, CROSS-CLASS CLIMATE MOVEMENT

THE WORKBOOK FOR COALITIONS

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INTRODUCTION

By now, you've hopefully read through The Report on Coalitions. This workbook is meant to help you translate the analysis and recommendations we provide there into workable features of your organizing. Whether you're currently involved in a multiracial, cross-class climate coalition, thinking about starting one, or evaluating a past coalition on reflection, we hope this workbook clarifies for you and your coalition partners the breadth of considerations and decisions you should be prepared for.

This workbook is divided into the recommendations we arrived at in the report. We provide a short commentary on why we think each recommendation is important and then break the concept down into a series of questions meant to kickstart discussions between you and your coalition partners. These conversations will (hopefully) lead to a greater sense of trust and clarity among you all as you step into your work. Full descriptions of each recommendation can be found in the [report](#) (page 35).

These exercises are, at their heart, about making your individual assumptions explicit to each other. By having clear conversations with coalition partners on these points, you can avoid harmful miscommunications that, at best, slow down the work of the coalition and, at worst, can splinter the coalition altogether. With that said, finding alignment may not be easy or quick, so we also foreground the importance of trust, cooperation, and empathy when approaching these discussions. While these questions are framed in terms of a new coalition getting off the ground, feel free to rephrase them to whatever stage matches your coalition's trajectory.

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BUILDING THE COALITION

Clarify your shared goals, and revisit them frequently

Be explicit with the vision, goals, and desired benefits of your coalition, and refer back to them when assessing strategy and tactics

- When, where, and how will you work with coalition partners to identify your overall goal or goals? Will that conversation be revisited and, if so, how often?

- In terms of policy outcome, will there be any benefits that are “must-haves” (the benefits that have to be in the outcome for it to meet the coalition’s goals)? How will you identify and agree upon “red lines” (those pieces that can’t be compromised at all)?

- What benefits or protections would different constituencies get if you were to reach the desired policy outcome? How would you know if those benefits are delivered?

- How will you make those benefits well-known to the affected constituencies?

- How will you discuss expectations regarding how you will treat one another and/or commitments related to interpersonal relationships? When will that conversation come?

BUILDING THE COALITION

You can collectively create group culture

Coalition members should take the time to discuss not only shared goals but also their collective values and principles

- How will members be able to share past coalition experiences, which could provide points of comparison as you collaborate on how you want to work together?

- Which values or principles – e.g., equity, justice, solidarity – will ground the coalition in this work?

- How will you ensure that everyone involved has a shared understanding of what those principles look like in terms of the expectations for behavior?

- How will you assess if you are realizing your shared relational culture values during the course of the coalition? How often will that process take place? How will you reintegrate those insights and course-correct if needed?

- What will happen when someone's behavior is inconsistent with the values you all have committed to?

BUILDING THE COALITION

Identify who's in and who's out

Clearly define boundaries internally and externally to clarify expectations and reduce confusion about coalition membership

- Thinking about those most affected by the issue at hand, how will you commit to those constituencies being involved in leading the coalition?

- What are the expectations (around capacity, resources, etc.) for individuals and organizations "in" the coalition? How will you communicate those expectations to individuals and organizations that are "in" the coalition?

- Will it be possible for organizations to be involved in ways that are less of a lift or more episodic than full commitment? If so, how will you decide what is expected of a group and its members given x level of involvement?

- What criteria must a new group meet to be considered for inclusion? Who will decide whether that organization can join?

- What information or processes will be essential to provide to new groups or individuals? Who will make sure onboarding happens in a timely way?

BUILDING THE COALITION

Be candid about existing resources and the need for up-front investment

Provide support for under-resourced member groups in order to address internal power differentials that threaten participation

- What capacity will be required for specific levels of commitment to the coalition? What process of accountability will there be if an organization's level of capacity or resources drop?

- Will any or all groups be expected to ask their funding sources (whether grantmakers, organizational members, or individual supporters) to support the coalition's work?

- If you plan on applying for grants, who or what group will be responsible for preparing any application, updates, or evaluation materials?

- Who will be responsible for deciding how funding is allocated – either to a group or a given campaign need?

- How will you take inventory of the in-kind resources that each group could provide the coalition?

- Will you mark specific times in the campaign when you can assess how any needs have changed or opportunities emerged?

BUILDING THE COALITION

Take an audit of existing capabilities

Assess the skills and knowledge bases that coalition members bring into the collective so that you can match campaign needs to actual capacities

- How will each group identify and share the past success, strengths, and capacities they can contribute to the coalition?

- How can you identify specific tools or systems (e.g., media database, CRM) you anticipate needing? Will members need individual training to use those systems?

- Do you envision those and other resources being the strict purview of a host organization, or are they managed collectively?

- How will you evaluate the make-up of any sub-committees or task-based teams with an eye toward diversity? Does that analysis focus on organizational diversity? Diversity of individual-level demographics or experiences? Diversity of experience with the task?

BUILDING THE COALITION

Brainstorm the kinds of work and capabilities the coalition might need

Similarly, take stock of the skills and capabilities the coalition will likely need in order to succeed, as well as how to distribute tasks and responsibilities

- How will you assess the existing strengths and weaknesses of the coalition? How will weaknesses be addressed?

- How will you leverage people's past coalition and campaign experiences to build a list of anticipated roles, processes, or protocols needed to get the work done?

- If there are critical skills that are missing, who will be involved in discussions about how to fill them (e.g., hiring a consultant, investing in training, inviting a group with that capacity to join)?

- Which roles do you envision being permanent? If you decide to have temporary roles, how will you figure out when they start and end?

- How will you divide the work of the coalition? Will it be broken up by organization or by creating sub-committees from people across orgs?

- How will you make sure that you have people available to step in when surprises arise?

- When and how will you check if the division of labor and skills matches the campaign's needs once it's underway?

WAYS TO WORK TOGETHER

Map out how and by whom decisions – big and small – will be made

Determine the governing structure that works best for your particular coalition and make those processes explicit to all members

- What decision-making model will your coalition use? Is that model to be applied coalition-wide, or is there flexibility for people to rely on a different system for specific kinds of decisions or in certain contexts (e.g., when the decision is time sensitive)?

- Will debate be limited by time or any other factors?

- If there will be some kind of leadership body, what kinds of decisions will they be accountable for compared to other groups?

- How will you address potential internal power dynamics and disparities in material resources and capacity between coalition members?

- How will any leadership positions be allocated and filled – by an organization, by a specific person? Will the leadership structure be more or less permanent, or will the coalition rotate positions over time?

- What thresholds of agreement will be necessary to move forward different kinds of campaign decisions?

- How will you ensure that all participants can see or ask how decisions came to be, and by whom?

WAYS WE WORK TOGETHER

Inclusion matters in decision-making, not just coalition composition

It's not enough to just be at the table – decisions need to include those who are closest to and most affected by the issue at hand

- How will inclusion look in your coalition? What criteria will be the basis for inclusion? Inclusion into what parts of the coalition?

- For any given task or decision, which people and viewpoints should be involved or consulted?

- How will you assess to what extent members feel strategically empowered (as opposed to merely being in the space)?

WAYS WE WORK TOGETHER

To build trust going forward, recognize when it has been betrayed in the past

Potential partners do not enter into coalitions as blank slates, so leaders need to develop ways of expressing credible commitments that build (or rebuild) trust

- Have constituencies or organizational members been able to name and discuss any past harms, hesitations, or betrayals of trust with other members? Will there be a process or guideline about how those parties process and move forward? Who will participate in setting up or facilitating that process?

- If individual members of the coalition have a history of rocky encounters, how will that history be addressed to ensure it does not get into the way of collaboration?

- Given that trust will likely falter over the course of the campaign, where can safe discussions about ongoing or new issues take place?

- When disagreement arises in interpersonal or group contexts, what facilitation practices will your coalition use to make any differences productive?

- How will individual organizations demonstrate the seriousness of their commitments to one another?

WAYS WE WORK TOGETHER

Set expectations about behavior and accountability mechanisms for addressing present and future conflict or violations

Conflict within coalitions is inevitable; consequently, coalitions need to develop principles and procedures to correct and potentially sanction bad behavior

- If someone is experiencing harm, will there be a particular person or group they can look to for support?

- How will you identify any specific grievances that would warrant formal processes or collective discussion?

- How will you make grievance procedures explicit and well-known across the breadth of the coalition?

- Will there be a clear set of standards for conditions under which an organization or person is asked to leave the space?

- In addition to time set aside to assess political strategy, will you allocate time to reflect on how people are relating to one another? What opportunities do participants have to share positive and negative experiences with collaboration?

WAYS WE WORK TOGETHER

Where possible, discuss any out-of-bounds policies or thresholds ahead of time

Individual organizations all have their own values and “red lines” they will not cross. These should be shared explicitly and revisited when needed to limit potential misunderstandings and divisions

- Think back to the “red lines” decided upon by the coalition. What is the plan to check in on the necessity of those “red lines” as campaign dynamics and political conditions change over time?

- How will you collectively discuss how the coalition’s principles – justice, equity, etc – translate into policies, programs, or other solutions?

- Who will represent the coalition with lawmakers, lobbyists, media, or other social movement organizations?

- What kinds of decisions will they be authorized to make themselves versus bring back to the larger group?

- How many people (and from what kinds of organizations) will have to agree for a policy change or compromise to be accepted?

STAYING ALIGNED

When in doubt, over-communicate

Misunderstandings are the biggest threat to any relationship, so develop strong norms of explicit communication and information-sharing to keep everyone on the same track

- What systems will you have in place to share information and updates? At what intervals will new information be circulated?

- Who will lead on internal communication? What norms will you establish around note-taking, email updates, or standing meetings?

- What will organizational representatives need to keep their individual constituents informed and engaged?

- What processes will you put in place for two-way communication – giving constituents the chance to share updates or reflections that then get passed back to the coalition?

STAYING ALIGNED

The more predictability and routines you can build into coalition work, the better

One way to build trust among coalition members is to develop and follow through on the expectations partners set for each other around the work itself and how they will relate to one another

- How will you brainstorm or role-play to identify expected campaign needs, then establish processes or protocols to match?

- Is there a set part of meeting agendas or a specific person responsible for collecting and responding to questions about internal processes? How will you keep everyone up to speed about any changes or additions?

- Will you have a written record of all protocols and procedures that participants can refer back to? How will it be available?

- How will you make it clear where (in digital or physical space, or to a person) someone should turn for different kinds of information?

STAYING ALIGNED

Remember that political work is emotional

Building a collective identity among coalition members can fortify the emotional resilience needed to overcome internal and external stressors

- Will you try to break down any larger goals into smaller parts that can, when completed, be celebrated as little victories?

- How will you celebrate wins or milestones?

- If there are setbacks or failures, when and how will you give people time to process any loss, disappointment, or trauma?

- Will there be opportunities where participants are encouraged to share individual feelings and experiences?

- What will it look like to practice praise-worthy failures that emphasize the lessons that come from any perceived mis-steps?

STAYING ALIGNED

Give members opportunities to get to know coalition partners

Recognizing and celebrating who advocates are as people – not just movement allies – bolsters mutual trust and credibility

- Will there be small ways – icebreakers, shared meals – where you could encourage participants to share their personal stories and backgrounds?

- What opportunities can you create for coalition members to spend time with each other outside of work time? With what frequency?

- Will social time be structured (e.g., featuring activities or facilitation) or unstructured?

HOW TO KEEP GROWING

Plan for how you'll evaluate strategy

How will you know if you're winning? Determine and develop metrics (whether quantitative, qualitative, or both) that can accurately assess how your coalition is building power

- How will you collectively identify metrics that will empower you to assess whether the current strategy is working?

- What data will be needed for those metrics? How varied will the types of data used and sources of data be? Will you collect qualitative as well as quantitative data? Will you consider both internal and external input?

- Who will be responsible for collecting and/or analyzing each type of data that you might collect?

- At what intervals will you review relevant metrics?

- What indicators will be used to determine whether strategy needs to be adjusted?

HOW TO KEEP GROWING

Learning is key to growth and success

Set aside dedicated time, both during and after the campaign, to reflect on how the coalition is functioning and respond to changes in context

- What system or process will you use to reflect on the coalition's past work? What will be the cadence for those reflections? Who should participate?

- Who will be charged with capturing lessons or other "live" data that could be used for reflection later?

- When will you revise tactics, strategy, and/or theory of change if previous work does not seem to be effective?

- If the coalition is to be formally dissolved, what will the process of retiring it look like?
