



# **BLUEPRINT FOR A MULTIRACIAL, CROSS-CLASS CLIMATE MOVEMENT**

## **THE WORKBOOK FOR COALITIONS**

SECOND EDITION

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# HOW TO USE THIS WORKBOOK

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By now, you've hopefully read through The Report on Coalitions. This workbook is meant to help you apply the recommendations to your organizing practice and culture. Whether you're currently involved in a multiracial, cross-class climate coalition, thinking about starting one, or evaluating a past coalition, we hope this workbook clarifies for you and your partners the breadth of considerations and decisions you will likely face.

The structure of the workbook mirrors the report recommendations. We break each suggestion 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 as you step into your work. Full descriptions of each recommendation can be found in the report (pages 38-43). Additional links to selected resources are provided at the end.

## **Special note for coalition facilitators and coordinators**

As a coalition facilitator, your role is not just to guide discussion but to help create the conditions where trust, honesty, relationships, and strategy can flourish. Facilitation in coalition spaces often means balancing diverse perspectives, surfacing unspoken assumptions, and keeping the group grounded in shared goals. This workbook is designed to support in that role by offering guidance questions and self-reflection prompts that can sharpen focus and guide you to design agendas and facilitate meaningful dialogue within your coalition.

To get the most out of the workbook, we presume users to have some skill with facilitating potentially difficult conversations. In particular, we emphasize the skills of shaping a healthy environment for discussion, listening, and bridging opinions. If you are unsure of your ability to lead that type of conversation, consider inviting in a trusted coalition partner or outside facilitator. Each section begins with a brief reflection question so that you can organize some thoughts about the appropriate container for discussion before jumping into the group exercises.

These exercises are, at their heart, about making your individual assumptions explicit to each other. Candid conversations on these points can help avoid harmful miscommunications that, at best, slow down the work of the coalition and, at worst, splinter the coalition altogether. 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 some of these questions are framed in terms of a new coalition getting off the ground, feel free to rephrase them to match your coalition's trajectory. Beyond the specific considerations in each section, we recommend that you revisit the following framing questions throughout your conversations.

### ***Setting the Container***

- > What do you need to do to create a safe and respectful environment for this conversation?**
- > What grounding rules can you establish to ensure listening, trust, and empathy are present?**
- > How will you handle moments of conflict or tension in ways that build rather than erode trust?**

### ***Clarity of Purpose***

- > Do you and your partners have a clear shared goal for this conversation?**
- > What is the larger purpose of this discussion in the context of the coalition's work?**
- > Are you prepared to help members of this coalition connect this dialogue to your larger strategy?**

### *Coalition Alignment*

- **Do coalition members understand and agree on your collective goals?**
- **Where might there be unspoken assumptions, and how might you surface them gently?**
- **What would buy-in look like here and how will you know you've reached it?**

### *Strategic Orientation*

- **How will you ensure this conversation stays tied to your broader strategy rather than drifting into side debates?**
- **How do you help and support participants to see the difference between emergent issues and long-term strategic priorities?**

### *Self-Checks for Facilitators*

- **Are you clear on your own assumptions and biases before stepping into this conversation?**
- **What questions or concerns are you carrying into this conversation?**
- **What support do you need (from co-facilitators, allies, the coalition at large) to hold this conversation effectively?**

### *Post-Reflection Questions for Facilitators*

- **Did the coalition stay focused on the shared goal of the discussion?**
- **Were all voices invited in and respected during the process?**
- **Did you strengthen trust and clarity, or did new tensions surface that need attention?**
- **What assumptions, blind spots, or misunderstandings emerged that you should return to later?**
- **What worked well about your facilitation, and what could you adjust for next time?**
- **How can the insights from this conversation feed into your coalition's larger strategy and next steps?**

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# SHAPING THE COALITION

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## Clarify your shared goals, and revisit them frequently

Considerations for facilitators: Be explicit with the vision, goals, and desired benefits of your coalition, and refer back to them when assessing strategy and tactics. Are you and your coalition partners already in agreement about what your coalition means to achieve and why those goals are important? Is there a mission statement or North Star you can refer back to during these exercises?

- 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?

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- In terms of desired campaign outcomes, 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)?

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- What benefits or protections would different constituencies receive if you were to reach your desired campaign outcome? How would you know if those benefits are delivered?

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- How will you make those outcome benefits known to the affected constituencies and the groups representing them?

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- How will you discuss expectations regarding how you will treat one another and/or commitments related to interpersonal relationships? Do you think that the coalition has the internal capacity to facilitate such a discussion at this time? If not, what processes — requesting proposals, setting budget, etc. — will be used to recruit a facilitator or other support?

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## SHAPING THE COALITION

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### You can collectively create Strategic Culture

Considerations for facilitators: Coalition members should take the time to discuss not only shared goals but also the collective values and principles that will ground how the work is done. Are you and your coalition partners aligned on how you will treat each other? Is there a shared understanding of why that answer can determine the coalition's effectiveness? What practices or considerations can help build alignment among the group?

- Do members of your coalition have positive examples of relational culture practices that they prefer or have enjoyed using in the past? What are those practices?

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- What relational culture dynamics have not worked well for members in this coalition or experiences they would like to avoid repeating? These can include toxic patterns of urgency culture, purity culture, radical signaling, and other behaviors.

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- 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?

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## SHAPING THE COALITION

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### Identify who's in and who's out

Considerations for facilitators: Clearly define boundaries internally and externally to clarify expectations and reduce confusion about coalition membership. Accountability for coalition members starts with a clear understanding of what they expect from coalition partners and what the coalition expects of them. Do your coalition members understand what is being asked of them — in terms of how to relate to one another and their coalition responsibilities? How can you get partners on the same page?

- Thinking about the issue your coalition is working to address, how can you ensure that coalition leadership includes the constituencies most affected by it?

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- 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?

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- 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?

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

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

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## SHAPING THE COALITION

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

Considerations for facilitators: Provide support for under-resourced member groups in order to address internal power differentials that threaten participation. Has your coalition spoken explicitly about resources (e.g., funding, staff time, expertise, etc.) and how they will be sourced? What are the hidden (or not-so-hidden) power dynamics at play in your coalition? How can you address those explicitly to make the coalition more strategic?

- 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?

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

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

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

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

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

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## SHAPING THE COALITION

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### Take an audit of existing capabilities

Considerations for facilitators: Assess the skills and knowledge bases that coalition members bring into the collective so that you can match campaign needs to actual capacities. Is it clear what skills each coalition member brings to the larger collaboration?

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

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- 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?

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

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## SHAPING THE COALITION

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### Brainstorm the kinds of work and capabilities the coalition might need

Considerations for facilitators: 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. Is your coalition set up to achieve its goals? If not, what (or who) else does it need? Are coalition members well-positioned to maximize their effectiveness?

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

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- > 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?

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- > 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)?

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

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- > 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?

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## SHAPING THE COALITION

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- What are the responsibilities for each sub-committee of the coalition? What are the boundaries for each sub-committee beyond which they require checking in with the larger coalition body? Are those responsibilities and boundaries well-known to all coalition members?

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- 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?

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

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

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# WAYS TO WORK TOGETHER

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

Considerations for facilitators: Determine the governing structure that works best for your particular coalition and make those processes explicit to all members. How can the values that make up the coalition's Strategic Culture be represented in its collective governance structure? Does everyone in the coalition know who exactly makes what kinds of decisions? Are people happy with that arrangement?

- > 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)?

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

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

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

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- > 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?

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

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

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## WAYS TO WORK TOGETHER

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### Actions should be guided by Strategic Culture

Considerations for facilitators: Maintaining your Strategic Culture means staying true to the values and principles that you and your coalition partners commit to. That doesn't change even when the road gets difficult or parties are tempted to put their self-interest over the coalition's interest. How can you and your coalition partners stay consistent in your commitment to your cause and to each other?

- How will you assess if the coalition is meeting the commitments you made regarding Strategic Culture? How often will that review or reflection take place?

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- How will you reintegrate those insights and course-correct if needed?

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- What are some potential traps, temptations, or bad habits that could threaten your Strategic Culture (e.g., cutting side-deals, falling into urgency culture, renegeing on equity commitments)? How can these be anticipated and planned for pre-emptively?

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- What will happen when someone's behavior is inconsistent with the coalition's values and shared commitments (in other words, out of line with your coalition's Strategic Culture)?

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## WAYS TO WORK TOGETHER

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### **Inclusion matters in decision-making, not just coalition composition**

Considerations for facilitators: 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. Is anyone missing from decision-making processes that represent those core constituencies? If someone or some group has been excluded from the coalition, is there a clear and strategic reason why?

- Are there specific organizations or constituencies present in the coalition that have been historically excluded from power in your issue area?

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

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- How will you make sure all members feel empowered to help make decisions (as opposed to merely being in the space)?

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## WAYS TO WORK TOGETHER

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

Considerations for facilitators: Potential partners do not enter into coalitions as blank slates. Leaders need to develop ways of surfacing past problems and expressing credible commitments that build (or rebuild) trust moving forward. How could you assess the level of trust among coalition members, both to each other and to the collective effort? What might be standing in the way of 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?

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- 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?

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- Have members shared positive and negative examples of conflict management practices? Has the coalition identified practices to repeat or avoid?

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- If trust is damaged over the course of the campaign, how should the coalition surface these issues and recommit to each other?

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- When disagreement arises in interpersonal or group contexts, what facilitation practices will your coalition use to make any differences productive? What frameworks will be used, and how will participants be familiarized with them?

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## WAYS TO WORK TOGETHER

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### Set expectations about behavior and accountability mechanisms for conflict

Considerations for facilitators: Conflict within coalitions is inevitable; consequently, coalitions need to develop principles and procedures to correct and potentially sanction bad behavior. What processes and practices will the coalition use to work past conflict? Examples of possible conflict resolution frameworks include: the SCARF model's relational approach (see Blueprint Report Second Edition); the Interest-Based Relational Approach, which seeks to identify overlapping interests between parties; Transformative Mediation, which emphasizes conflict as potential for growth; and Reciprocal Cognitive Behavioral Therapy, which seeks to reduce emotional reactivity in unpacking disagreements.

- What training or resources will be provided to coalition partners to address the complex dynamics of race and class that might occur during the coalition's work?

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

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

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- How will you make grievance and conflict management procedures explicit and well-known across the coalition?

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## WAYS TO WORK TOGETHER

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- Will there be a clear set of standards for conditions under which an organization or person is asked to leave the space? What does the process look like for that party to re-enter the coalition?

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- 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?

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## WAYS TO WORK TOGETHER

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

Considerations for facilitators: Individual organizations all have their own “red lines” they will not cross. These should be shared explicitly and revisited when needed both to limit potential misunderstandings and to navigate political contingencies. How can your coalition pre-empt conflict by clarifying what items (policy concepts, tactics, etc.) are likely to arouse controversy?

- Have partners had a chance to articulate the policy red lines that are not up for negotiation versus those where there is room for compromise? What is the plan to check in on the necessity of those “red lines” as campaign dynamics and political conditions change over time?

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- How will you collectively discuss how the coalition's principles – justice, equity, etc – translate into policies, programs, or other solutions? How will you commit to sticking to this Strategic Culture?

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- Who will represent the coalition with lawmakers and lobbyists? What about with media? What about with other social movement organizations?

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

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

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# STAYING ALIGNED

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## When in doubt, over-communicate

Considerations for facilitators: 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. Does your coalition have a culture of clear communication and routines and processes to support that? If not, where are the breakdowns and bottlenecks that are holding you back?

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

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

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- If organizational representatives are expected to keep their individual constituents informed and engaged, what resources or support will they need?

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- 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?

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## STAYING ALIGNED

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

Considerations for facilitators: One way to build trust among coalition members is to develop and follow through on the expectations partners set for each other around work and how they will relate to one another. Predictability – when paired with collectively-shared values – can ground coalition members when conditions get chaotic. How can your coalition build in more predictability?

- How are the values that make up your Strategic Culture replicated through the practices and processes of the coalition's work? Are there coalition practices or processes that do not seem to mesh with your Strategic Culture?

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- How will you establish new processes and protocols to match new campaign needs as they arise? What tools (e.g., collective brainstorming, role play, small groups) will you use to develop new ideas?

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- Is there a set part of meeting agendas or a specific person responsible for collecting and responding to questions about internal processes?

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

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

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### Remember that political work is emotional

Considerations for facilitators: Building a collective identity among coalition members can fortify the emotional resilience needed to overcome internal and external stressors. This means that when times get tough, coalition members can be assured that their partners are going to stick by them and to the spirit of their collaboration, allowing them to step up rather than shrink from pressure. From an emotional perspective, what does it mean (or what would you like it to mean) for an organization to be a member of your coalition?

- > Does each organization within the coalition value their continued involvement in the collective effort? If not, what expectations are not being met for them to fully buy in?

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- > How can the coalition break down any larger goals into smaller parts that can, when completed, be celebrated as little victories?

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- > How will you celebrate wins or milestones?

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

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

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

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## STAYING ALIGNED

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### Give members opportunities to get to know coalition partners

Considerations for facilitators: Recognizing and celebrating who advocates are as people – not just movement allies – bolsters mutual trust and credibility. Deeper relational connections can help break down the pretenses that hinder honest communication, thereby strengthening the coalition’s effectiveness and individual members’ engagement. Do you feel that coalition partners are fully participating in coalition matters? Could part of that disconnect be due to a lack of personal connection?

- What are some small ways – icebreakers, check-ins, shared meals – where participants are encouraged to share their personal stories and backgrounds?

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

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- What are the desired end results of social time (e.g., more direct communication, higher attendance at meetings, greater geniality)? Will social time be structured (e.g., featuring activities or facilitation) or unstructured?

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# HOW TO KEEP GROWING

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## Plan for how you'll evaluate strategy

Considerations for facilitators: How will you know if you're winning? Determine and develop metrics (based on quantitative and/or qualitative data) that can accurately assess how your coalition is building power and moving toward its end goals. Are coalition partners aligned on the indicators and metrics you will all use to gauge effectiveness?

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

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- > 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?

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

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- > At what intervals will you review relevant metrics?

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

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## HOW TO KEEP GROWING

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### Learning is key to growth and success

Considerations for facilitators: Set aside dedicated time, both during and after the campaign, to reflect on how the coalition is functioning and respond to changes in context. These are opportunities to show off the flexibility that comes with strong collective buy-in to a Strategic Culture. Does your coalition feel adaptable or is it penned in by rigidity?

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

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- Who will be charged with capturing lessons or other "live" data that could be used for reflection later? How will these lessons be integrated into any reflection or evaluations?

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- If your metrics and indicators suggest that the strategy, and/or theory of change isn't working, what does it look like to revisit those core assumptions?

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## HOW TO KEEP GROWING

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### Be intentional about the fate of your coalition

Coalitions face natural stopping points, transition moments, and/or growth opportunities. Discuss with coalition partners how you will navigate those conversations when the time comes. What is the legacy your coalition hopes to leave behind, not just in terms of policy but impact on your organizing environment? Are there parts of the coalition architecture that should be made permanent to leverage for future fights?

- If the campaign is coming to an end, who will decide the outcome of the coalition? Is there a reason and enough buy-in to sustain transitioning or rooting – whether among the whole coalition or a subset of members?

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- If the coalition is to be formally dissolved, what will the process of sunseting it look like? How will relationships and insights be preserved?

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- Have you identified a process for reviving the coalition if needed? What does each potential partner need in order to collaborate again? What would it look like to integrate past learnings into a new political context?

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# SELECTED RESOURCES FOR COALITION FACILITATORS

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## Coalition structure

- [Designing Resilient Coalitions](#) report and reflection guides (thank you P3 Lab)

## Strategic Culture

- Momentum training slide deck on [Strategic Culture & Movement DNA](#) (thank you to Cicia Lee and Adiel Pollydore)

## Conflict management frameworks

- Climate Advocacy Lab training slide deck on [Coalition Conflict Management](#) (thank you to Assata Harris and Gabby Heidrich)
- [SCARF model](#)
- [Interest-Based Relational \(IBR\) Approach](#)
- [Circles of Influence](#)
- [Transformative Mediation](#)
- [Reciprocal Cognitive Behavioral Therapy \(CBT\) Model for Conflict](#)
- [Turning Towards Each Other: A Conflict Workbook](#) (thank you Community Resource Hub)