

EXCERPT

ROOTS OF CHANGE

A step by step guide to building &
sustaining an advocacy coalition

Ipas

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COALITION BUILDING

This resource is an excerpt from a tool called Roots of Change: a step by step advocacy guide for expanding access to safe abortion. The purpose of this section is to provide you with the key considerations and practical resources necessary to ensure a sustainable and well-functioning coalition for your advocacy work. Ipas is available to provide additional assistance based on the information in this resource. Please contact advocacy@ipas.org if you have further questions.

A coalition is a powerful tool for mobilizing stakeholders in support of a collective goal. Forming and sustaining a coalition, however, can be extremely challenging and resource-intensive. Think carefully about the composition of your coalition, ensuring that each stakeholder is committed to achieving the advocacy goal you have articulated. If there is already an existing coalition dedicated to broader sexual and reproductive health goals, consider how you might join forces to achieve the advocacy goal you identified.

In general, the groups working in your advocacy coalition should:

- Include groups that represent the beneficiaries of your work
- Specialize in a priority area (law, health, women's rights, etc.)
- Have contacts and experience that allow them to act strategically
- Have or be able to obtain funding to cover the costs of anticipated activities
- Be committed to the goals of the coalition

Determine where there are gaps or weakness in your coalition and identify groups or individuals who could fill those gaps. Make sure you know who controls access to the relevant health services and plan to include them in some way. For instance,

are only certain health providers authorized to provide certain services? You may need to invite a highly-respected provider who supports your issue to join your group. Are NGOs working on your issues interested in the coalition's cause? Maybe they can help you tackle the issue using rights language and concepts. *Use the stakeholder mapping table from Section 2 of the Roots of Change advocacy guide to identify key coalition members.*

Try to identify and involve all parties who have some stake in what happens with your issue; failing to include certain groups now may lead them to oppose or undermine your efforts later. Try not to limit your coalition. Strive for the right complement of partners at the start, but be willing to take a new look at your coalition periodically to see if additional groups should be invited to join.

Advocacy Pitfall: Obstacles such as distance, lack of transportation, lack of funds, and linguistic or cultural barriers can make it hard to involve grassroots women in national coalitions. For example, women from rural areas may be less experienced with rights-based activism than women who live in capital cities. But without the participation of rural women, does your coalition really reflect the full population? Will your coalition be perceived as representing only a select group?

The rest of this section contains key considerations for you to keep in mind as you develop and work to sustain an advocacy coalition. These are topics that, if not understood and addressed, can cause problems for your coalition that reduce and impede its effectiveness. Review each consideration carefully and think about how it does or could affect your coalition.

Decisionmaking and authority structures

Key challenges you may experience:

- Lack of established and validated governance structure
- Coalition is new, inexperienced, and has insufficient funding
- Coalition members have different advocacy priorities (family planning vs. abortion)

Solutions and resources:

- Adopt a coordinated and validated structure
- Recruit qualified and committed members
- Adopt bylaws and statements of commitment
 - *Bylaws* are the written rules that control the internal affairs of the coalition. They can define things like the group's official name, purpose, requirements for membership, officers' titles and responsibilities, how offices are to be assigned, how meetings should be conducted, and how often meetings will be held. Bylaws also govern the way the group must function, as well as the roles and responsibilities of its officers. They are essential in helping an organization map out its purpose and the practical day-to-day details of how it will go about its business.

Bylaws Template

This is an example of coalition bylaws that you may use or adapt as appropriate for your needs

Bylaws of

Article I: Name and Purpose.

Section 1: The name of the organization shall be

.....

Section 2: (Name of organization) is organized for the purpose of

.....

Article II. Membership.

Section 1: To become a member of (name of organization), potential members must meet the following requirements:

.....

(include commitment statement if desired)

Section 2: Members of (name of organization) have the following rights and responsibilities:

.....

Article III. Officers and decisionmaking.

Section 1: The governing structure of (name of organization) is as follows:

.....

(Insert Task Force or Executive Board structure that will govern coalition.)

Section 2: Task Force officers' titles and main duties are as follows:

a. President:

b. Vice President:

c.

d.

Section 3: Procedures for filling and vacating offices. An officer shall be dropped for excess absences from his or her office if he or she has unexcused absences from meetings in a year. An officer may also be removed under the following circumstances:

.....

Section 4: Committees:

Section 5: Decisions

a. Decisions are to be made as follows:
(Describe voting procedures and minimum votes required to pass a measure.)

b. At least % of the total membership must be present to have a quorum.

c. Amendments to the bylaws must be made as follows:

Article IV. General, special and annual meetings.

Section 1: Regular meetings are to be held as follows:

.....

Meetings may be called by the following people:

.....

For meetings, notice (in writing, via phone, via email)
of at least (days/weeks/months) must be given to members.

Section 2: Special meetings may be called by

.....

(who has authority to call them) under the following circumstances:

.....

Section 3: Annual meeting. The date of the annual meeting shall be set by

and notice (in writing, via phone, via email)

of at least (days/weeks/months)

will be given to members for the annual meeting.

Article V. Task Force or Executive Board

Section 1: Task Force size and role. The task force shall have up to
and not fewer than members. The Task Force is responsible for

Section 2: The Task Force shall meet at least
(frequency), at an agreed upon time and place.

Section 3: Elections and terms. Task Force members will be chosen by

.....
All task force members shall serve (month/year) terms, but (are/are
not) eligible for re-election.

Section 4: Quorum. At least% of the task force members must be present
before task force business may be conducted.

Section 5: Resignations and Termination. Resignations from the task force must be in
writing and must be given to (whom).

A task force member shall be dropped for excess absences from the task force if he or
she has unexcused absences from task force meetings in a year. A task
force member may also be removed under the following circumstances:

.....
Section 6: Special meetings. Special meetings of the task force may be called under
the following circumstances:

.....
These bylaws were approved at a meeting of the

..... (task force, officers, general membership) on
..... (date).

Coalition coordination

Key challenges you may experience:

- Lack of full time, committed, paid coordinators
- Need for logistics and other resources (materials, supplies, etc.)
- Need for a membership committee to manage communications, new member orientation, etc.
- Political pressures

Solutions and resources:

- Consider how to increase funding— are donors willing to pay for formation of a coalition?
- Utilize information sharing systems like Google Groups, Facebook Groups, WhatsApp, etc.
- Appoint an experienced coordinator and chairperson
- Develop a comprehensive workplan
 - A *workplan* helps turn the vision of the coalition into a reality. It describes the way your group will use its strategies to meet its objectives. A workplan consists of several action steps or changes to be brought about in your community. Each action step or change to be sought should include the following information:
 - What activities will occur?
 - Who will carry out these activities (lead, support, be consulted)?
 - By when they will take place, and for how long (timeline)?
 - What resources (money, staff, time, etc.) are needed to carry out these changes?
 - Communication (who should know what?)
 - How will you measure your success and learn from your failures?

COALITION COMMITTEES

Specialized committees are usually action-oriented. Depending upon the issue they address, their initial goals may be very specific or more general. In either case, however, their purpose is to come up with real results. The membership of committees will usually center around a particular area of expertise or representation of a set of relevant stakeholders (for example, communications, health, legal, media, etc.).

How can these committees operate within the context of the broader coalition? There are several options. Three common models:

1. *The task force or action committee operates independently.* In this situation, the larger group delegates authority for the issue in question to the task force that's working on it. It may come back to the initiative for help, support, or resources, or to report on its progress, but the decisions about how to proceed are its own.
2. *The task force operates fairly independently, but reports back to the larger group on a regular basis.* It doesn't need approval to do most things, but can't commit the initiative to anything or act in its name without an official okay.
3. *The task force needs permission to take any action steps at all.* Operating this way, it would probably formulate a plan and get it approved by the larger group. Then, it would have to check with the larger group only if the plan changed.

Regularly check on the status of the coalition using the *Coalition Health Check-up Score Sheet* available on next page.

Diagnosing the Health of Your Coalition

[Adapted from Gillian Kaye, President, Community Development Consultants, Brooklyn, New York]

Using the scale below, rate each component of your organization, then tally your score on the score sheet provided at the end.

Strong or Always 5 4 3 2 1 **Weak or Never**

1. The clarity of your coalition's vision, mission and goals

- A. Your coalition's vision (your dream) and mission (what you are going to do) take into account what is happening in the community.
- B. Your vision, mission and goals are written down.
- C. Residents and institutions are aware of your coalition's vision, mission and goals.
- D. Your coalition periodically re-evaluates and updates its vision, mission and goals.
- E. Your coalition's activities are evaluated in relation to its vision, mission and goals.

2. The effectiveness of your coalition structure

- A. Your coalition has a regular meeting cycle that members can count on.
- B. Your coalition has active committees.
- C. All of your members have copies of the bylaws.
- D. Your task force or executive board and committees communicate regularly.
- E. Your task force or executive board meets on a regular basis with good attendance.

3. The effectiveness of your outreach and communication

- A. Your coalition has a newsletter or another method of communication that keeps the community updated regularly and informed about your activities.
- B. You use a survey or other method to collect information about members' interests, needs and concerns.
- C. You always publish those survey results and use them to guide your coalition's projects.
- D. The survey is conducted every year or so because the community and residents change.
- E. Your coalition conducts its outreach where the members are, including where they live, shop, and work.

4. The effectiveness of coalition meetings

- A. Members feel free to speak at a meeting without fear of being confronted for their views.
- B. Your coalition advertises its meeting with sufficient notice by sending out agendas and fliers in advance.
- C. You provide childcare, transportation and translation when needed.
- D. You accomplish the meeting's agenda in meetings that start and end on time.
- E. You hold meetings in central, accessible and comfortable places and at convenient times for all members.

5. Opportunities for member responsibility and growth

- A. Your coalition makes a conscious effort to develop new leaders.
- B. You offer training and support to new and experienced leaders, either through your coalition or through outside agencies.
- C. You give committees serious work to do.
- D. Leadership responsibilities are shared; for example, you rotate the chairing of a meeting between members.

6. The coalition's effectiveness at planning, implementing and evaluating projects

- A. At the beginning of each new year your coalition develops a workplan that includes goals and activities to accomplish during the year.
- B. These plans are based at least in part on information collected from member surveys.
- C. After each activity or project, the leadership or the committee evaluates it learn from the experience.
- D. Your coalition always organizes visible projects that make a difference to members.
- E. When you undertake projects, you develop action plans that identify tasks, who will do them, and by what target dates.

7. Your coalition's use of research and/or external resources

- A. Your coalition works with other coalitions in the community on common issues, and with other organizations that address critical community concerns.
- B. Your coalition utilizes the resources and information of other organizations that can help the community, such as training workshops.
- C. Your coalition keeps updated on issues affecting communities across the districts and country.
- D. Outside speakers come to meetings to address topics of interest to members.

8. The coalition's sense of community

- A. Your coalition builds social time into meetings so that people can talk informally and build a sense of community.
- B. You plan social activities.
- C. Everyone in your organization is treated equally.
- D. You recognize and reward all member contributions, large or small.
- E. You make all residents welcome in the coalition regardless of income, ethnicity, religion, gender, age or education level.

9. How well the coalition meets needs and provides benefits

- A. You make resource lists and important contacts available to members on a regular basis.
- B. You hold workshops with experts who can provide specific services to members.
- C. Your coalition helps members out with issues of individual need.
- D. Your coalition holds meetings and workshops in which residents can meet elected policymakers and government personnel to voice their opinions and learn about resources and programs in the community.

10. Your coalition's relationship with elected officials, institutional leaders and other power players

- A. Coalition leaders know how to negotiate successfully with elected officials and institutional leaders about member concerns.
- B. Your coalition has one or more regular representatives who attend important community meetings.
- C. Coalition leaders and members understand the lines of authority, decisionmaking power, responsibility, and other aspects of the community power structure.
- D. Your coalition meets with officials on a regular basis about the issues that concern members.
- E. Your coalition participates in district-wide activities and demonstrates focus on community issues.

COALITION EVALUATION SCORE SHEET

Fill out this score sheet using the total numbers from each section of the organizational diagnosis.

Section:	Total Score:
Vision, mission and goals
Coalition structure
Outreach and communication
Coalition meetings
Member responsibility and growth
Projects
Research and external resources
Sense of community
Needs and benefits
Relation with power players

For each section, follow the guidelines below:

If you scored between:

- 5–15 Watch out! You may need an overhaul in this area.
- 15–20 Checkup time! It's time for tune up to get everything in good working order.
- 20–25 Congratulations! You're running smoothly and all systems are go. Keep up the good work!

Membership

Key challenges you may experience:

- Keeping the group together and on track to achieve advocacy goal
- Keeping coalition manageable in terms of size and scope
- Capacity (funding, skills, experience)
- Individual organization mandates that pull members away from coalition activities/priorities

Solutions and resources:

- Consider defining terms of reference (TOR) for members
- Capacity-building trainings for members that build experience and idea sharing
- Evaluate progress. Evaluating progress means to determine the value of the work you are doing as a coalition. You have developed and implemented an initiative in your community, and you want to know how well it's working. Evaluation provides you with this feedback.
 - When should you evaluate progress?
 - When your plan is in action—
 - Determine baselines for behaviors you wish to change. If you want to know how much change your program has brought about, you'll need to know what was happening before your group got started. Focus on the impact your work is having on the community. Continue revising and updating action plans. Keep the group strong and focused on the goals at hand. You may want to use a survey that appraises your community goals, and use the feedback to change your planned priorities.
 - When some of your action plans are complete—
 - Use the evaluation to help the group continue to measure its impact on the community, and to create plans for continuing helpful programs for the future. For example, community level indicators will tell you if your interventions are having an impact on the bottom line.

Event Log Form

The event log form below is designed to help you record major activities of your group's initiative, such as community actions. They are also used to record any changes in the community facilitated by the initiative.

Event log for:

Site: **Completed by:**

For this form, please describe:

- Actions taken to bring about changes in the community related to your coalition goals
- Changes in programs, policies, and practices related to your coalition goals

Date (MM/DD/YYYY)	
Event Give broad information about the event. Include why it is important and what happened as a result.	
Description Who was involved? What organizations were the collaborators? What community sector or objective does this relate to? Was this the first time the event happened? Lessons learned—what would you do differently?	

MAPPING OF MEMBERSHIP CAPACITY

Regardless of the region or country of focus, no law or policy reform effort can succeed without skillful collaboration with a wide range of partners. In the last section, you identified key stakeholders that are relevant for achieving your advocacy goal. A coalition or network should draw directly from the community it seeks to serve; working through a coalition means you can support and strengthen the voices of the key stakeholders you identified in the last exercise. Building and maintaining a strong and effective coalition or network is the key to successful policy initiatives. Bringing together stakeholder support, through formal coalitions as well as more informal partnerships, is key to the success of your advocacy. You may not know the answers to everything, but use this opportunity to ask questions of colleagues and other partners who may have the information you need. Think about the advocacy goal and key stakeholders that you've identified as critical for your work.

Use the *Key Stakeholder Mapping Form* below to better understand current and future partners for the coalition. For each partner, complete the following information to the best of your ability. After you've done this for each coalition partner, you should have a better sense of who the strongest partners are, as well as those who may need additional support and/or capacity-building.

Partner Mapping Form

Partner Name:

Mission Statement:

How does this group represent the community you are trying to serve?

.....

What is this organization's specialty area?

.....

Who does this group know or have access to that will be helpful for your advocacy?

.....

How has the organization previously expressed its commitment to your advocacy goal (public statement, verbal commitment, etc.)? How do you know this organization will be a committee coalition member?

.....

Rate the stability and strength of this organization in the categories below:

(1 being lowest, 5 being highest)

..... *Financial:* The organization has relatively stable funding and has the capacity to seek and manage additional funds.

..... *Operations:* The organization is adequately managed and functions well independently.

..... *Diligence:* The organization operates efficiently and has a reputation for completing work on time.

..... *Human Resources:* The organization is adequately staffed to take on additional coalition work.

..... *Political Resources:* The organization is able to influence public discourse, develop campaigns and has developed strategic partnerships with key stakeholders.

Diversity

Key challenges you may experience:

- Getting the right people to attend meetings, including underrepresented or marginalized groups
- Identifying likeminded organizations outside of capital city
- Ensuring inclusiveness nationwide

Solutions and resources:

- Consider how you might use the broader SRHR framework to pull in diverse partners
- Diversity of coalition member expertise is key
 - If you can bring different types of members into your group, it will be more representative of the full community—your group will stand to gain broader community support.
 - With a multi-sector membership, more opinions will probably be expressed and discussed—that means better decisions may get made.
 - A diverse, multi-sector membership is usually also a larger membership with more talent and variety of talents at your disposal.
 - The contacts and connections made in a diverse, multi-sector group lead to new community relationships, sparking new community initiatives that might never have otherwise existed.

WHO?

Think of society as being composed of component parts. Just about anything that exists has such components. Living beings have organs and cells; nations have towns and cities; galaxies have stars. In a community, the basic component parts are often called sectors. The sectors of society can be thought of as pieces of the pie. Here's an example of how to think about those sectors:

1. **Social institutions:** These institutions are large and powerful social structures that guide and control much of the community's life. In any community, these are likely to include:
 - **Schools**—especially public schools, local colleges and universities, and possibly private and parochial schools

- **Churches**—which may also include organizations and groups within the churches and across all churches, such as interfaith or ecumenical groups
- **Businesses**—particularly large employers, and/or profitable businesses, acting singly or through collective groups, such as the chamber of commerce
- **Media**—including local newspapers, local radio and TV stations, local cable television, and other community-wide print publications
- **Government**—national, district or city

2. **Other common organizations**

- Clinics, hospitals
- Ethnic clubs or associations
- Hobby groups
- Housing authorities and housing groups
- Neighborhood groups
- Professional associations
- Professional schools
- Recreational groups
- Religious groups
- Service associations (the Rotary, etc.)
- Social service agencies

3. **Individual citizens**

Rapid Response

Key challenges you may experience:

- Lack of spokesperson trainings to respond on short notice
- Lack of communication plan/strategy (including rapid response plan)
- Lack of structure and appropriate messages for responses

Solutions and resources:

- Communications plan/strategy is critical for advocacy (See Section 5)
- Key spokespeople must have ongoing training and support

Financial Sustainability

Key challenges you may experience:

- Lack of a fundraising strategy
- Over-reliance on one donor
- Challenge with respective funding requirements which might conflict with mandates of specific organizations (Global Gag Rule, for example)

Solutions and resources:

- Roadmap for the coalition (How long does it need to exist?)
- Donor mapping (Who is funding this kind of work and will they support your coalition and/or partner organizations?)
- Fundraising strategy
 - Financial difficulties, unfortunately, are an important consideration for all organizations. If your group is like many community organizations, finding the money to reach your goals is a constant struggle. Do we cut staff or programs? What will we do when the grant ends? Where else can we get support?
 - Fortunately, you don't have deal with your financial woes alone. There are people who can take care of the money so that other members of the organization can breathe easier and focus on the work they are expected to do. The people who can help manage your finances may be on the Coalition Task Force, hired grant writers, or (our suggestion) members of a *financial sustainability committee*.

A Financial Sustainability Committee can:

- Help get resources to help your organization survive and thrive.
- Ease the transition from one source of funding to another, such as at the end of a grant period.
- Help find money or goods from many different sources—a financial committee that has members with many connections will help lead to a diverse funding base for your organization, which is one of the most effective ways to ensure sustainability.
- Meet some funders' requirements—sometimes, the existence of a committee for financial sustainability is a requirement for receiving a grant.
- Allow members of your group to focus their time and energy on the jobs they were hired to do. Too often, members of organization spend so much time trying to find resources for the organization they are unable to spend time doing what they were hired to do. A community mobilizer may spend all his/her time mobilizing the community around the need for money to keep the organization going instead of the real issue of child hunger, for example. By having a committee of experts taking care of the finances, you allow the mobilizer to do what s/he knows best.

Alliances Across Movements

(nontraditional SRHR allies like civil rights activists or general human rights defenders)

Key challenges you may experience:

- Lack of understanding of your issue may make other groups reluctant to forming alliances with your organization or partners
- Challenge with the focus and commitment to the cause of certain renowned local movements/networks—they feel nervous/ambivalent about being vocal on your issue

Solutions and resources:

- Consider ways to find common ground with nontraditional partners (for example, by offering them something that they don't have, like a gender or SRHR analysis for their work)
- Identify ways to support nontraditional allies, even if it doesn't directly support your work
 - Building trust and loyalty from allies often involves showing up for them without asking for anything in return
 - They are more likely to follow in turn if you take the first step, but be sure to weigh the cost/benefits before expending too many resources



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