

## From Coalitions to Community Constituents

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Sample Workbook

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## Overview

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### Purpose

- Create or rejuvenate coalitions for greater reach and impact
- Utilize coalitions as a tool to create strong, supportive, engaged community constituents
- Leverage coalitions for increased community visibility, support, and attention.

### Preface

Coalitions, alliances, or task forces are a means to an end. They can be valuable to share ideas, research, and best practices; to collaborate on activities; to pool resources; and to create programs or attain results. They can prove that the whole is greater than the sum of the parts.

However, community coalitions are typically underutilized as a resource to effect community change. Coalitions can be an invaluable tool to build a strong and broad base of support and loyal and engaged constituents.

### *Constituents*

Those people who are necessary to the success of your program.

They are the people that you serve, or that are necessary in order for you to meet strategic goals in programs, marketing, and fundraising. They are an integral component, without which the program would have little meaning. The core is your target market – those who care or potentially care enough about the program or cause to take significant, meaningful action on its behalf.

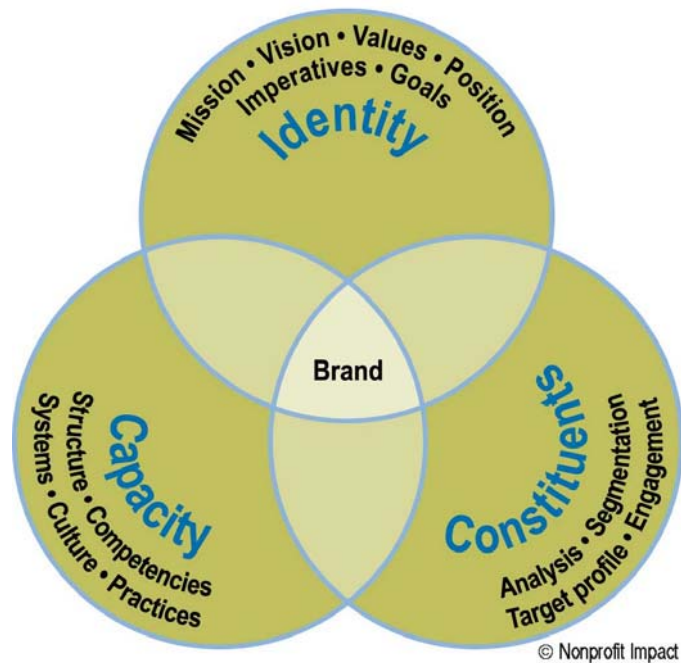
## Worksheet: The Coalition “PLAN”

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**Do not proceed. Do not pass go. Do not collect \$200... until you can answer these questions!**

- What is the purpose of your coalition?
  
- What *must* the coalition accomplish in the next 12 to 18 months?
  - 2 or 3 goals, not all the activities!
  
- Who *must* be part of the coalition in order for it to be successful in bringing about change in this community?
  
- What are the specific responsibilities of coalition members and how will they be held accountable for carrying out those responsibilities?
  
- Whose role is it to ensure the coalition functions as a team in which the whole is greater than the sum of the parts?
  - Note: meetings do not create teams, and teams are more than a group of people working together on a task
  
- Do coalition members understand their role in creating loyal, engaged constituents towards specific community results? And do they have the power, influence, and skills to do so?

### The *Integrated Strategy* for Success and Sustainability

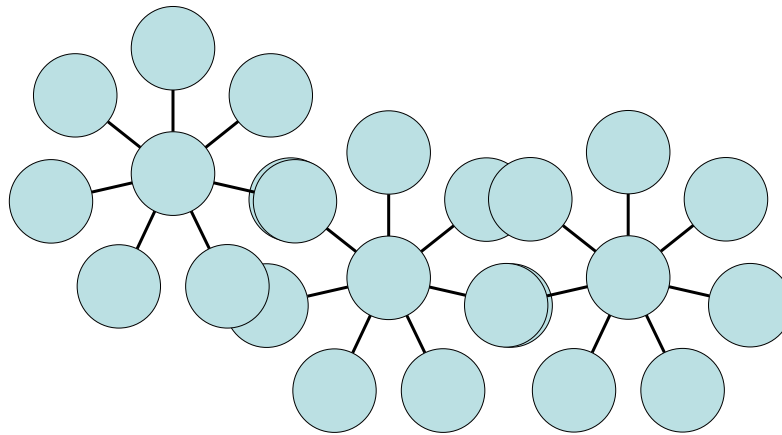


To be most potent and sustainable, an organization needs a clear and strong identity, loyal and engaged constituents, and sufficient capacity to achieve goals. When all three components are well developed and aligned, an organization creates a solid brand and enhances its ability to attract resources to achieve mission-related results.

***Sustainability:*** Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an *ongoing basis*. Sustainability requires the organizational / programmatic infrastructure to carry out core functions *independent of individuals or one-time opportunities*.

## Coalitions AS Constituents

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### Stakeholder Segments

**Target Markets** Those groups of people who behave relatively homogenously relative to the issue, who are most likely to take the desired action

**Partners** Those agencies, organizations, entities that are necessary to achieve outcomes (see strategic alliance information on page 10)

**Grantees** Those to whom we provide funds to carry out specific activities towards outcomes

**Publics** Those groups of people, agencies, organizations, entities with whom we must have positive relationships such that we can achieve outcomes; those with whom we must maintain a positive image

**Influencers** Those individuals, agencies, or organizations that provide significant leverage or influence in helping to achieve outcomes

**Funders / Donors** Those people and agencies that provide the resources to do the work

**Internal Customers** Those people and departments within the agency or organization whom you depend on or who depends on you

## Principles: Stakeholders, Coalitions, and Constituents

- All stakeholders need to become loyal and engaged constituents, but strategies to engage them will vary.
- Not all stakeholders need to be coalition members to be engaged.
- Being a member of the coalition does not guarantee engagement as a constituent.
- Coalitions are only one tool to engage stakeholders and to create constituents.
- Coalition meetings may be necessary, but are not sufficient to creating constituents.
- Creating constituents is about creating relationships.

## Strategic Alliance

- An agreement between two or more entities stating that the involved parties will act in a certain way in order to achieve a common goal. Strategic alliances usually make sense when the parties involved have complementary strengths.
- One essential feature is that a strategic alliance is intended to move each partner towards achievement of some long-term strategic goal.
- Alliances are formed to provide complementary goods and services or to allow new businesses to develop; or to synergistically create value resulting from the coming together of previously separate resources, position, skills, and knowledge.
- It's about creating new value together, not simply an exchange.
- Successful alliances require active collaboration. Active collaboration takes place when organizations develop mechanisms – structures, processes, and skills – for bridging organization and interpersonal differences and achieving real value from the partnership.

*What is the difference between a strategic alliance and a coalition?*

*Should your coalition be a set of strategic alliances?*

## Re-defining Coalitions

- **What is the impact you want to make in the community?**
  - Not all the activities or programs -- the impact, or difference you make
- **How is change brought about in your community?**
  - Influencers? Grassroots up? Top down? Etc.

### **THEN....**

- Who are the key stakeholders and what is their role in the coalition?
- Why is each stakeholder at the table? What do they bring? What do they expect?
- What does your organization or agency bring to the table? What is the value added? What is your distinct role beyond “coordinator” or “facilitator?”
- Who does each coalition member represent? Who are their constituents and why are they important? Does the coalition member “bring” their constituents to the table?
- How can we turn stakeholders into engaged constituents?
- What are the opportunities to reach a broader base of stakeholders through the coalition? Who is on the coalition that is not from the “core” i.e. economic development people, large employers, other?
- How will you cultivate meaningful relationship and constituents withOUT meetings?

## Create Loyal, Engaged Constituents

- Understand your constituents and why **THEY** care!
  - Social marketing – understand the constituents’ benefits and obstacles
  - How does the issue resonate with what the constituents care about?
  - It is not about you and your program’s issues and needs; it is about them and their concerns and values
- Turn stakeholders into core constituents
  - Two-way interaction; not just e-mail updates and not just meetings
  - Opportunities for meaningful, active engagement
  - Engaging constituents is as much about what you **DO** as what you say
  - Listen and adapt (within mission and outcomes)
- Integrate the constituent in everything you do
  - What would change if we asked: “how would our constituent think about this?”

## Understand Stakeholders as Constituents

- Describe your community relative to your program.
- Who are your core constituents and why?
- Describe your core constituent’s values, attitudes, lifestyles, and behaviors relative to the program / the issue.
- How do you reach and engage core constituents to lead to long-term engagement and support? (Programs and outreach strategies)
- What do you do for your constituents on a regular ongoing basis?
- Who are your publics (as compared to the core constituents) and how do you maintain positive community relationships?
- What are your two or three key strategic alliances? What do you bring to the alliance and what do you expect in return? What do you do to make the alliance a viable, long term, mutually beneficial one?

## Building a Team

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### Turning a Coalition into a Team...rather than a Group of Like-Minded People!

- ✓ Define the nature, scope, and purpose of the task
- ✓ Define the skills, abilities, positions, and representation required
- ✓ Clearly and explicitly define responsibilities, decision making, etc.
  - *See the Task Force Charter for more information*
- ✓ Agree on operating protocols
  - How will the team handle conflict?
  - How will you ensure a diversity of ideas and opinions?
  - How will you ensure that everyone will be able to contribute fully?
- ✓ Define and establish systems for sharing information
  - Agree on communication protocols
- ✓ Hold only useful, substantive meetings
  - Agenda – information, discussion, decision items
  - Process / task balance
  - Outcomes
  - Follow-up
- ✓ Create and use systems for high-accountability to task and to each other

Treat each other like team members; communicate constantly and honestly; build trusting and solid relationships; team members never let each other fail nor do they let each other down.

## Creating a Strategic Alliance: Considerations

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### How do we develop and maintain strategic relationships?

- How will you define contributions and results?
- How will you identify real and potential cost and benefits?
- How will we understand our partner's goals, culture, and activities?
- Where are the potential areas of conflict?
- What are the long-term opportunities? And risks?
- Does each partner have reasons to be equally committed to the alliance?

### What are the terms of the alliance?

- Have you clearly identified goals and explicit desired results?
- Have you clearly defined roles and responsibilities?
- What is the scope, context, content and duration?
- What are joint tasks or interface among tasks?
- How will resources be allocated?

### How will we manage for success?

- What are our measurements of success?
- How will we monitor progress?
- How will we address conflicts or tension?
- How do we hold each other accountable?
- How will we foster and maintain open, honest, ongoing communication?
- Who are the decision makers?

*Excerpted From: Alliance Advantage, The Art of Creating Value through Partnering, Yves L. Doz and Gary Hamel, Harvard Business Review Press, 1998*

## Applying Marketing Principles

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(Note: a marketing plan format is a useful tool to define specific strategies to reach and engage your constituents)

### Marketing / Selling / Communications

- Marketing is *understanding* the interests of your audience and creating the *programs* and *strategies* so they take action on your behalf
- *Not* selling
  - Not persuading someone to buy something they don't want or need
  - Not about reaching everyone who "should" care
- Marketing is distinct from communications, public relations and outreach
  - Effective communications underlies all marketing efforts
  - Marketing is *more* than "the message" or a communication strategy
- Marketing is first, providing programs / services / products (offerings) that resonate and are relevant to the target market
- Outreach strategies include direct contact, advertising, earned media and promotions, increasingly outreach is through an electronic medium
- The future of marketing is customized, individualized marketing to the "masses" and continues to be a customer relationship management (CRM) task
  - Those that manage relationships best, win!

### Segmentation and Target Marketing

- Segmentation based on the way a market behaves relative to your product or service
  - A process that helps define a group of people based on demographics and psychographic such that you can market specifically to them
- Target marketing ensures the most effective return on investment
  - Not exclusive but focused

### Simply ...

- Marketing takes all the great stuff you do and gets tons of other people to be as passionate and engaged as are you and your most loyal, engaged constituents
  - Most organizations do not reach a broader audience to support its work because they do not market to them (but rather have a "if we build it, they will come" marketing strategy)

## A Good Marketing Program...

- Is supported by a well researched, objective and deliberate, *strategic marketing plan*
- Emanates from an “*intimate*” *understanding* of the constituent
- Reaches the constituent in a way that is *meaningful* to them
- Is simple, systematic, *strategic*
- Is integrated through-out the organization
- Creates a “*constituent-centered*” mindset
- Sees the world from the eyes of the constituent
- Achieves specific *goals*

**You never *don't* market.**

***Recognize that your market and potential market is not you.***

## Creating a Marketing Plan

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- Define your marketing goals
  - What are you trying to achieve through marketing?
- Describe the external environment or context
  - What are the social, political, economic, industry trends and issues that impact your work?
- Define the largest potential market
  - What is the scope of your efforts?
- Segment the potential market
  - How does the audience relate to your services or marketing goals?

### ***Select target markets***

Based on target market selection criteria and marketing goals, which markets are most likely to take action on your behalf?

- Know and understand those target markets
  - How do those markets behave, what are their values, attitudes, lifestyles, what do they think about, how do they make decisions, who influences them?
- Design services / programs to effectively engage those markets based on their values and attitudes
  - These are all your programs, services and issues – not just what your marketing department does.
- Create outreach, communication and public relations strategies to reach target markets
  - What strategies provide the most value in the eyes of the market?
- Measure success in meeting marketing goals

## Marketing Plan Matrix

Target Market	Profile	Needs/ Interests (relative to your cause)	Desired Behavior	Position, Message & Brand	Product / Service	Outreach / Promotion / Public Relations

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