

# 13 Steps to Building Effective Coalitions

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# About API



AMERICAN PETROLEUM INSTITUTE

- National Trade Association representing all aspects of the oil and natural gas industry
- API Standards
- API Certification
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# Focus of the Presentation: 13 Steps to Building Effective Coalitions

1. **The Long Game: Build relationships before you need them**
2. **Define the Goal**
3. **Define who needs to be in the room**
4. **Define the issue and target audience**
5. **Define anticipated activities**
6. **Address key questions about organization**
7. **Define Boundaries**
8. **Address Funding**
9. **Define targets for coalition membership**
10. **Create recruiting documents**
11. **Recruiting**
12. **Launching the coalition**
13. **Managing the coalition**

# Step One... The Long Game: Build relationships before you need them

Personal  
Stake



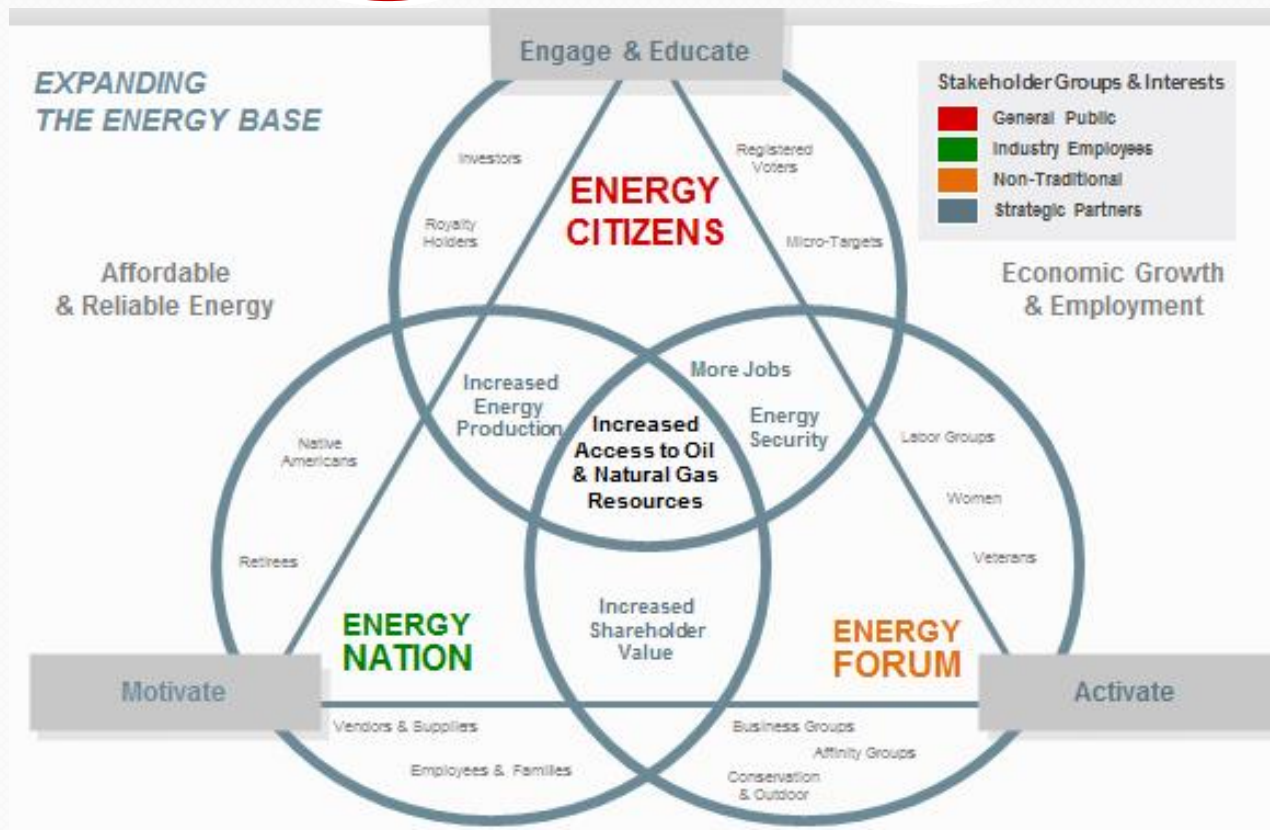
Education



Personal  
Relationship



Educated  
Engaged  
Ally



# Step Two: Define the Goal

What is the goal of the coalition?

Defeat/pass legislation, ordinance, resolution?

Regulatory issue?


Defeat/pass ballot issue?

Pure Education?

Other?

# Step Three: Define who needs to be in the room

Some questions to ask to determine who needs to be in the room for initial planning

- 
- Who is so influential over the target audience, they are critical to the coalition?
  - Who has the ability and relationships to help recruit?
  - Who has critical assets needed by the coalition?
  - Are there groups or individuals that you feel you have to have on the coalition to be successful?

# Step Four: Define the issue & target audience

## What is the issue and who is your target audience?

**Is it a ballot issue or before an elected body? At what level? Federal? State? Local?**

- **Voters:** All voters should be able to look at the coalition and see someone they identify with:
  - Someone they voted for
  - A leader or organization they respect
  - An organization they are a member of
- **Elected body:**
  - Targeted legislators/elected leaders
    - Leadership or those that can influence other votes
    - Committees and their chairs
    - Those on the bubble
  - Who are third party influencers that would have an impact on an elected leader?



# Step Five: Define anticipated activities

**What are the anticipated activities of the coalition? Depends on the goal**

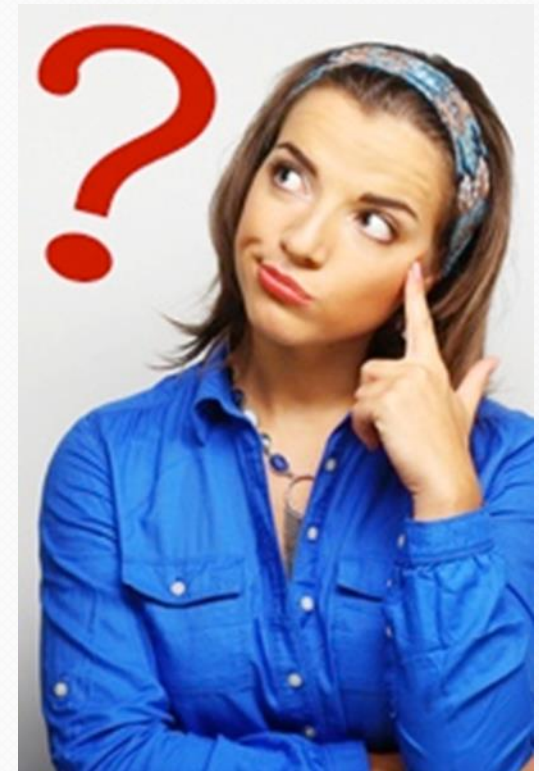
- **Defeat/pass legislation, ordinance, resolution**
  - Testimony
  - Contacts into elected leaders
  - Earned, social and/or paid media,
  - Mail, calls, radio, TV and other tactics to provide cover or apply pressure
  - Research?
- **Defeat/pass ballot issue**
  - Voter education: mail, phones, paid media, earned media, social media, canvassing, literature, events
  - GOTV
  - Research?
- **Education**
  - Educational materials
  - Events/meetings
  - Mail/phones, paid media, earned media, social media, etc
  - Research?.



# Step Six: Address key questions about organization

Several questions about organization need to be answered

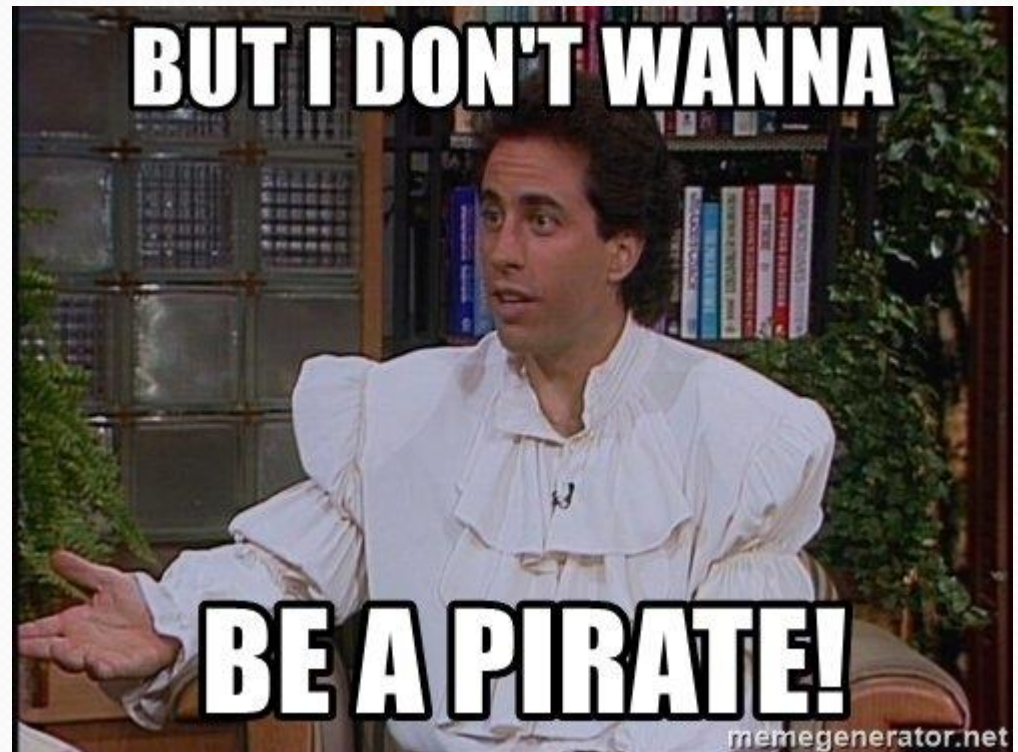
- **Who needs to be in the room to determine organization?**
- **Legal organization**
  - Create a legal entity? What type?
  - Coalition in name only?
- **Leadership?** Who will be responsible for driving the train?
- **How will decisions be made?**
  - Core coalition team? If so, who will be on core team
  - Full coalition?
  - Unanimous decisions or majority?
- **Who will manage/execute the coalition's activities?**
  - Hire a consulting firm?
  - Split responsibilities among coalition members?
- **Type and regularity of communications/meetings?**
- **Long term coalition? Short term coalition?**



# Step Seven: Define Boundaries

Determine not only what the coalition **WILL** work on but also what it **WON'T** work on

Defining what the coalition won't do, can be almost as important as defining what it will do.



# Step Eight: Address funding

**How much funding will you need, and how will you raise it?**

**Create a budget based on anticipated activities**



**Determine how you will obtain needed funding. Some key questions:**

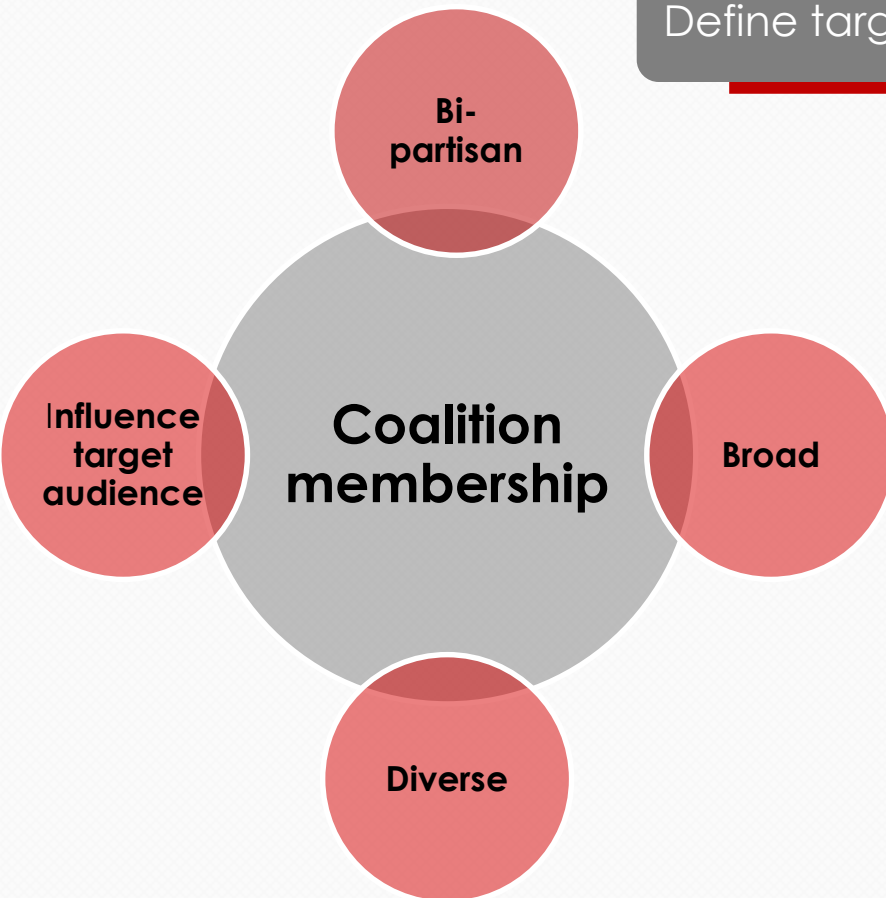
- Will one or a core group of coalition members provide all or a significant portion of the funding? If so, will that allow them greater decision-making power? Define.
- Will coalition members have to pay to join?
- Will you need to raise funds from outside of the coalition? Need to hire a fundraiser?

# Step Nine: Define targets for coalition membership

**What individuals or organizations will influence your target audience (from Step Four)**

Define targeted members

Assign team lead



**Potential targets for membership:**

- Elected Leaders (bi-partisan)
- Non-traditional allies: minorities/women
- Business
- Labor
- Conservation/Hook & Bullet
- Agriculture
- Veterans
- First Responders
- Industries relying on energy
- Supply chain companies
- Key Community Groups

# Step Ten: Create recruiting documents

**What documents will you need for potential coalition members?**

- **How you have answered the previous questions, especially on organization, will help determine documents you will need?**
  - Simple document describing the coalition? Make members sign?
  - Formal Agreement outlining goal, organization, activities, fundraising responsibilities?
  - Coalition press release?
  - Creation of legal entity?
  - **Messaging documents on why target members have a personal stake**



# Step Eleven: Recruiting

If you have completed steps one through ten, recruiting will go much more smoothly



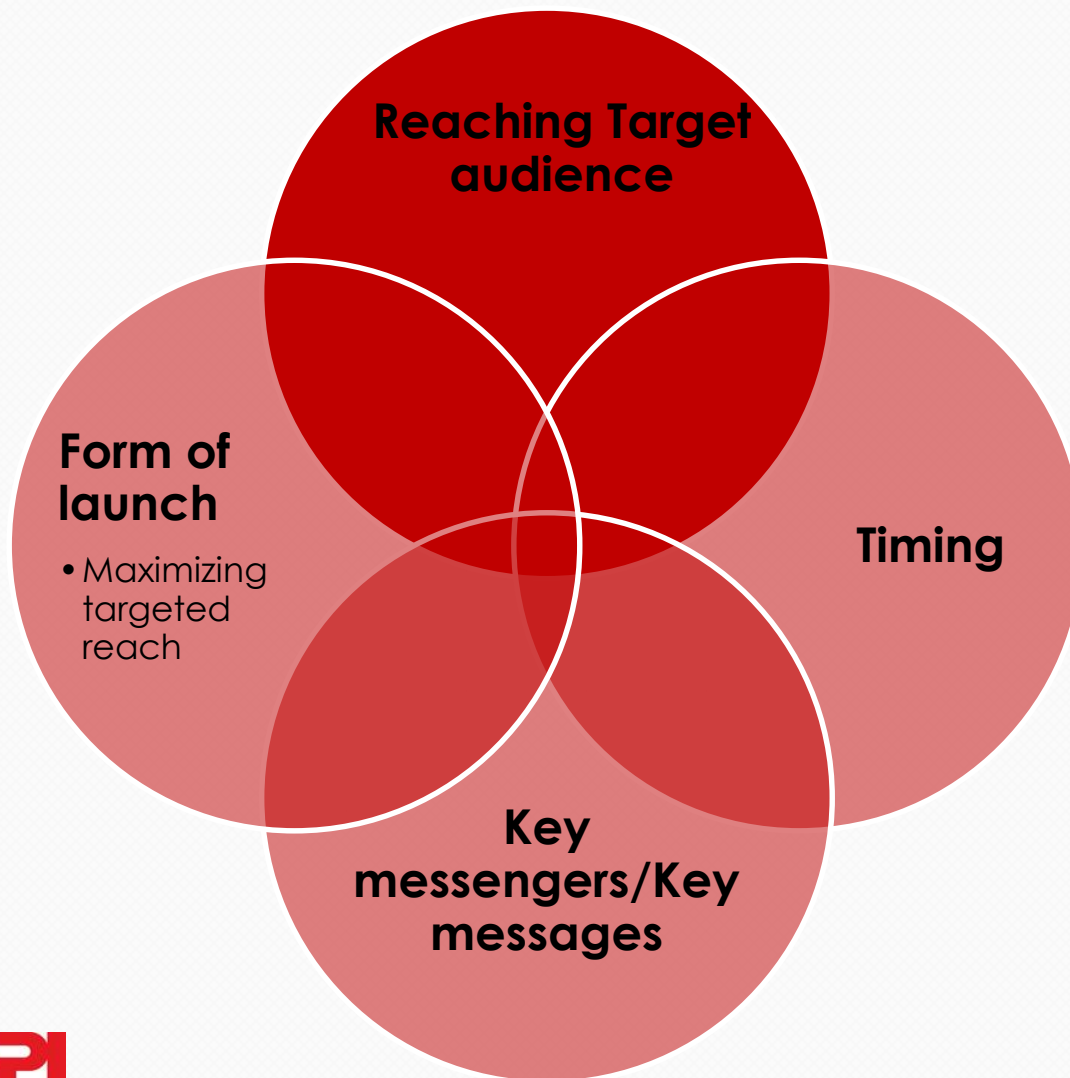
Educate targeted coalition members on the issue, why they have a personal stake in the issue, and how joining the coalition will benefit them.





# Step Twelve: Launching the coalition

Plan your coalition launch carefully to get maximum impact



## COLUMBUS BUSINESS FIRST

### **Bowling alleys among dozens of groups against FirstEnergy's nuke plans**

May 4, 2017, 2:27pm EDT

A bowling-center association is among dozens of groups hoping to send an Ohio utility proposal to the gutter.

The Bowling Centers Association of Ohio is part of the new coalition to oppose FirstEnergy Corp.'s plans to have customers subsidize the state's two nuclear power plants.

# Step Thirteen: Managing the Coalition

**Accountability, measuring success and flexibility are critical**

You have built a plan for goals, management, communications and coalition activities. Under the management structure determined, management must include accountability, measurement of success, and room for some flexibility within defined parameters as the issue evolves.

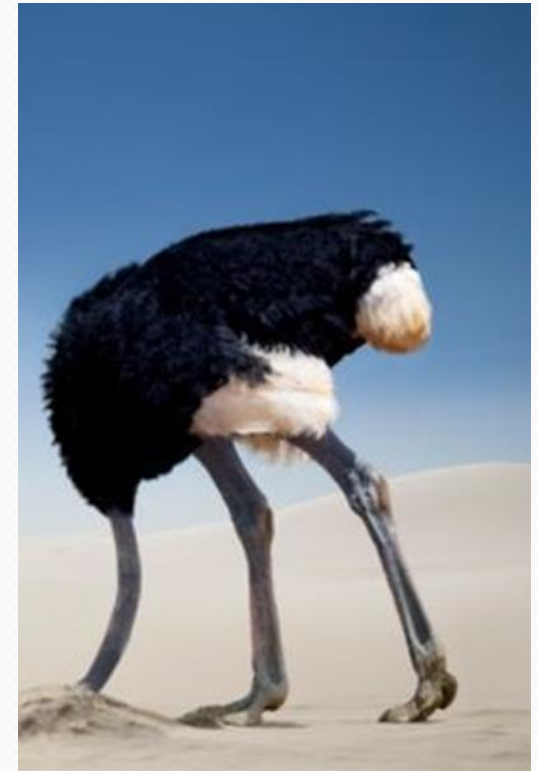




# Avoiding Common Pitfalls

## Some common pitfalls include:

- **Burying your head in the sand:** Wanting to build the coalition quickly and not deal with difficult issues or questions that might slow the process.
- **Skipping steps in building the coalition:** The steps call for clear direction on leadership/management, funding, activities, organization.
- **Defining the coalition too narrowly:** Not anticipating evolution of the issue and the need for some flexibility within defined parameters.
- **Not giving credit to others:** Make sure you give credit to other coalition members when credit is due.



**Questions?**