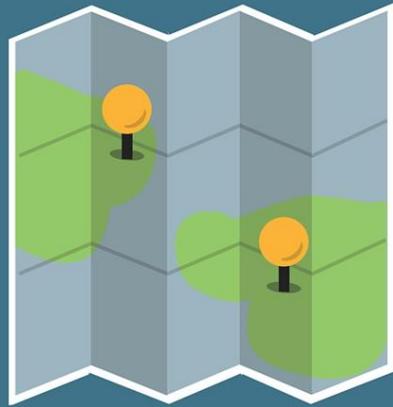# ACTION TO IMPACT:

# A COALITION-BUILDING ROADMAP

# Action to Impact:

## A Coalition-Building Roadmap

## SIDE TRIPS

# Action to Impact:

## A Coalition-Building Roadmap

## SIDE TRIPS

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*Leveraging collective expertise for impact.*

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# Action to Impact:
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**SIDE TRIPS**

## SIDE TRIPS

Knowing when and how to source the right kind of external support, to fill coalition gaps or to amplify the work, can be critical to maintaining coalition momentum. External support may come in the form of new research, tools and tips, case studies and lessons learned from other coalitions or expert consultants. Information in this section answers several key questions:

➢ Where can I find valuable resources to help make our coalition more efficient and effective?

➢ What local coalitions exist today that could serve as potential models, partners or learning labs for our coalition's work?

➢ What are common lessons learned about how to minimize or avoid inevitable bumps in the road? The Centers for Nonprofit Excellence and Partnerships for Strategic Impact partnered with the Community Mental Health and Wellness Coalition (CMHWC) to build a consultative experience around the needs of the coalition. This work was the launch pad for this Roadmap, and we share all our collective lessons learned here!

➢ When is the appropriate time to bring in the expertise of a consultant? What are the benefits and costs of working with a consultant? What is the best way to prepare for a consultant? How do you best form relationships with consultants and how do you then transition back to internal capacity?

The information in this section also includes Key Virtual Resources that were used in the development of the Roadmap.  Curated documents, articles, tools and templates from these sites were used throughout the Roadmap.  This section also details how local coalitions have tackled this work to provide a reference point and continue to highlight and make available all the local capacity we can for this work.  SIDE TRIPS highlights the lessons learned from working with the CMHWC and other local coalitions.  Finally, it provides a reference for how to determine when bringing in outside support, in the form of consultants, is necessary.

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## KEY VIRTUAL RESOURCES

We recommend the following resources for a deep dive into collaboration, collective impact and coalitions. At the end of this section, you can find topic-specific resources used by local coalitions. Selected resources from these sites are used throughout the Roadmap.

### Collective Impact Forum

The Collective Impact Forum is a resource bank for those practicing collective impact. Collective impact is the collaboration of a group of individuals and organizations from different sectors seeking to find a solution to a complex social issue.  The Collective Impact Forum houses valuable tools, case studies, templates and advice to advance the efforts of a collaborative effort. The Collective Impact Forum is a network of individuals coming together to share experience and knowledge to accelerate the effectiveness and adoption of collective impact. Created by *FSG* and the *Aspen Institute Forum for Community Solutions*, the Collective Impact Forum is a resource for organizations using collective impact to address social problems.

### Collaboration Hub by GrantSpace

Home to resources for collaboration in the social sector, this Hub includes valuable publications, questions and answers, links to videos and podcasts, blog posts and a comprehensive, searchable collection of 650+ profiles of vetted collaborations submitted for the Collaboration Prize in 2009 and 2011.  We encourage you to start by searching the *Nonprofit Collaboration Database*, where each profile provides information about the collaboration's participants, methods, successes, challenges and lessons learned.

### CoalitionsWork

CoalitionsWork, based in Yorktown, VA, houses a wealth of tools and resources designed to help coalitions develop, build and strengthen partnerships.  It includes checklists, surveys and a virtual library which includes a step-by-step guide for building a coalition. Further, CoalitionsWork can develop custom tools or adapt their current tools to fit the individual needs of your coalition.

### FSG

FSG is a national, mission-driven consulting firm that helps communities scale-up lasting social change. FSG houses articles, ideas, resources and tools to help people do their best work with impact.  We recommend starting with resources on *Collective Impact* which provides articles and videos on why collective impact is an approach that empowers systemic change.  We also

recommend the section on *Systems Thinking,* which guides users in developing maps to describe connections in complex systems.

## Ready by 21

Ready by 21 is a partnership of organizations that are committed to providing tools, training and technical assistance to increase the collective impact of community and state efforts to ensure that all kids are ready for school, work and life by the age of 21. Ready by 21 provides strategies to communities to help them work across sectors to make their goals a reality. Four toolkits provided by Ready by 21 and worth exploring are:  Broader Partnerships, Bigger Goals, Better Data and Bolder Actions.

## Tamarack:  An Institute for Community Engagement

Tamarack is an online learning community for collaborative leaders who work on multi-sector issues. It features relevant blogs, podcasts and a library of more than 500 resources ranging in topics from Community Engagement to Systems-Level Change to Collaborative Leadership to Evaluating Community Impact.  Tamarack is a free, member-based resource.  It is comprised of a dynamic community of learners communicating to address complex community issues and create change.

## The Bridgespan Group

The Bridgespan Group is an advisor and resource for social sector leaders to help scale impact, build leadership, advance philanthropic effectiveness and accelerate learning.  The site houses a wealth of publications, blogs and advice on a variety of topics, including collaboration.

## LaPiana Consulting

LaPiana Consulting houses valuable resources on:  Nonprofit Collaboration and Strategic Restructuring.  We encourage you to explore *The Collaborative Map* which illustrates the variety of ways that independent organizations can come together around a common goal. We also recommend that you explore the *Insights – For the Sector* section which houses resources on "Getting Started" and "Digging Deeper" into collaboration and strategic restructuring.

## Community Tool Box

Community Tool Box is a site that provides resources for those working to bring about social change.  It has 16 toolkits and over 300+ educational modules for use in teaching, training and technical assistance to help local communities connect people, ideas and resources.  We

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encourage that you begin by exploring the following: *Conducting Needs Assessment Surveys*, *Conducting Focus Groups*, *Conducting Surveys*, *Conducting Interviews* and *Developing Action Plans*, and the *Collective Impact* section (*Section 5*) of the Tool Box. The Community Toolbox is an extensive set of practical resources and toolkits that are thorough and easy to navigate.

Urban Institute

Although there are a seemingly unlimited number of resources provided by The Urban Institute, we encourage you to begin with the cross-sector initiative on *Performance Measurement and Management*. This resource can help you manage programs, make decisions and improve service in your community. Specifically, we recommend that that you explore the *Outcome Indicators Project* in the Projects Focused on Nonprofit Organizations section.

The following list of resources includes additional toolkits and resources for developing coalitions on *specific* topics. These toolkits have been used locally by CACHY, Smart Beginnings, MAPP, GRACE and CMHWC, respectively.

- ✓ Applying the Strategic Prevention Framework, Substance Abuse and Mental Health Services Administration. (CACHY)
- ✓ Building Effective Early Childhood Coalitions: A Literature Review by Altarum Institute for the Virginia Early Childhood Foundation, Altarum Institute (Smart Beginnings)
- ✓ Mobilizing for Action through Planning and Partnerships (MAPP), National Association of County and City Health Officials (MAPP)
- ✓ Best Practices to Address Community Gang Problems, Office of Juvenile Justice and Delinquency, Office of Justice Programs, U.S. Department of Justice (GRACE)
- ✓ Various resources from Prevention Institute, (CMHWC)
- ✓ Various resources from Community Anti-Drug Coalitions of America, (CMHWC)
- ✓ Virginia Community Health Data Portal, Community Commons (CMHWC)
- ✓ Virginia Community Health Data Portal, The Virginia Atlas of Community Health, (CMHWC)

## *LOCAL COALITIONS IN ACTION**

Here is a list of multi-sector, multi-stakeholder local coalitions engaged in ongoing community change efforts. Coalitions are developing, evolving and disbanding all the time and they define themselves differently at different stages of their development. This list includes coalitions identified as of July 2017.

### Community Mental Health and Wellness Coalition

The Community Mental Health and Wellness Coalition's (CMHWC) mission is collaborating to promote behavioral health and wellness through planning, advocacy and access to effective service delivery for our region. The Coalition is a multidisciplinary group composed of organizations and leaders throughout the City of Charlottesville and the County of Albemarle who recognize that our efforts will be stronger together by working together. They focus their efforts towards four primary goals, which are:

- ➢ ***No Wrong Door -*** Facilitate access to behavioral health and wellness services that ensure individual wellness promotion.
- ➢ ***Community Service Capacity -*** Strengthen service infrastructure and coordination in behavioral health and wellness.
- ➢ ***Advocacy and Information -*** Advocate, collect and share data and knowledge to promote behavioral health and wellness promotion.
- ➢ ***Healthy Coalition -*** Support a collaborative, engaged coalition for behavioral health and wellness.

The Coalition has regular Full Coalition meetings, as wells as meeting of Steering, Data, Service System and Communications / Public Relations Committees. For more information about the Coalition and how to get involved, contact Coalition Director Rebecca Kendall at rebecca.kendall@regionten.org.

### Thomas Jefferson Area Coalition for the Homeless

The Thomas Jefferson Area Coalition for the Homeless (TJACH) aims to make homelessness rare, brief and nonrecurring in our community. TJACH works to reduce homelessness by initiating creative solutions and coordinating regional resources and services. TJACH is the HUD-designated coordinator of the Continuum of Care for this community, supporting system improvement and collaboration to ensure a secure safety net for the homeless and very poor. The Service Provider Council, a committee of TJACH's Board of Directors, provides a forum in which providers share information and address concerns. Contact Anthony Haro at executivedirector@tjach.org for more information.

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## City of Promise

The City of Promise, a Promise Neighborhood initiative, is designed to create a continuum of solutions with the potential to significantly improve the educational and developmental outcomes of children and youth in the 10th and Page, Westhaven, and Star Hill neighborhoods. Modeled loosely after the Harlem Children's Zone in New York, City of Promise is a collaborative effort of public agencies, nonprofits, public schools and neighborhood residents to "change the game"—building a community where all children get what they need to succeed in school, work and life. The partners in the initiative were first convened in 2010 to respond to a Request for Proposals from the US Department of Education for funding to build a Promised Neighborhood. The partners won a grant in 2011, and the initiative has continued to build resources and capacity for supporting a director and administrative and direct service staff. The initiative closely tracks both individual student data, as well as community-level data to ensure that the most effective services are in place. For more information contact Denise Johnson, Executive Director, at djohnson@cityofpromise.org or 434-295-9525.

## Early Education Task Force

The vision of the Charlottesville-Albemarle Early Education Task Force is to ensure that every under-resourced or at-risk child in Charlottesville-Albemarle has free access to a high-quality early education program. The Task Force has a work plan that maps out goals, objectives and strategic actions related to the community's pre-Kindergarten class capacity, quality, funding and public awareness. For more information, contact co-chair Erika Viccellio, Executive Vice President of The United Way, eviccellio@unitedwaytja.org.

## Outcome Collaborative

The Outcome Collaborative is a collaborative convened by The United Way – Thomas Jefferson Area, and stems from their focus on high quality early childcare and education leading to school readiness. The partners link data from home visiting programs, pre-Kindergarten and public school to understand how the continuum of services are impacting the children served, to inform improvements to the service system and how services are delivered. While the initial conversations about linking data started in 2010, the Memorandum of Understanding was not signed until the spring of 2016, and the first consents were signed by families that same summer. For more information, contact Barbara Hutchinson at The United Way, bhutchinson@unitedwaytja.org.

## Juvenile Justice Advisory Committee (JJAC)

The JJAC started in 1998, as a workgroup of the Charlottesville/Albemarle Commission on Children and Families, as a ground swell of interest of the professionals involved in juvenile

justice with the strong support of the City and County governments. The original charge of the JJAC was: To convene community stakeholders on an ongoing basis to study juvenile justice system practices and implement strategies to prevent delinquency, promote accountability and rehabilitation, and improve efficiency and quality of the juvenile justice system in Charlottesville City and Albemarle County. The activities of JJAC have been guided by the objectives established in the first major accomplishment of the JJAC, which was a Comprehensive Juvenile Justice Plan written 2000. The JJAC has been flexible and responsive to community needs and conditions, responding to where the sense of urgency is in the community, and both generating and responding to community needs found in needs assessments. For more information, contact Rory Carpenter at the City of Charlottesville, carpenterr@charlottesville.org.

## Charlottesville Task Force on Racial Disparities in the Juvenile Justice System

In response to a request of the Charlottesville City Council, the city created a task force comprised of community members, stakeholders, and persons working within the juvenile justice system, with the intent of examining and explaining the disproportionate number of minority youths associated with the criminal justice system. The task force interviewed a wide array of persons working within or associated with the juvenile justice system, including police officers, attorneys, and judges, and documented the qualitative data derived from those interviews. They also analyzed previous data on local juvenile records, and held multiple forums within the community to engage the community in identifying and solving the problem of disproportionate minority contact in the juvenile justice system. The task force drafted an extensive report on their findings, which included suggestions for addressing and correcting the issue within the Charlottesville area. Contact Gretchen Ellis, the City of Charlottesville's Human Services Planner, at ellisg@charlottesville.org for more information on the Task Force.

## GRACE Task Force

In January 2012, former Albemarle Police Chief Colonel Steve Sellers, along with his former counterpart in the City of Charlottesville, Chief Tim Longo, convened a multidisciplinary task force to address the growing evidence of and concerns about gangs in the area with a collaborative, preventative approach. Part of the initiative led by the Chiefs was to implement the Comprehensive Gang Model endorsed by the Office of Juvenile Justice and Delinquency Prevention (OJJDP). In June 2012, the task force adopted by-laws and the name Gang Reduction through Active Community Engagement (GRACE). GRACE adopted the OJJDP Comprehensive Gang Model, which is considered a "best practice" for social intervention. The Model's key distinguishing feature is a thorough strategic planning process that empowers communities to assess their own gang problems and create a complement of anti-gang strategies and program activities. The first step of this approach was to conduct a comprehensive assessment of gang

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activity. For more information, check out this 2014 Comprehensive Gang Assessment report to GRACE or contact Albemarle County Police Department's Regional Gang Prevention Coordinator Michelle Busby at mdianabusby@gmail.com.

### Jefferson Area Coalition to End Elder Abuse

Announced on June 15, 2016, Charlottesville and Albemarle's Commonwealth Attorneys have partnered with attorneys, nonprofit advocates, city, county and state police, nursing homes, hospitals, area banks, the Federal Bureau of Investigation, the U.S. Attorney's Office and the U.S. Attorney's Office of Adult Protective Services to "enhance communication and cooperation to better prevent, identify, refer and prosecute elder abuse and exploitation in the local [Charlottesville] community." For more information contact attorney Doris Gelbman, dwgelbman@gelbmanlaw.com.

### Charlottesville Albemarle Coalition for Healthy Youth (CACHY)

The Charlottesville/Albemarle Coalition for Healthy Youth (CACHY) is a collaborative group of community members and agencies who care for and about young people. The partners convene to identify needs through available data, to harness resources, and to advocate for services for young people, provide information, and raise awareness about current trends and programs in our community. The partners collaborate through information sharing and supporting the work of service providers and partner agencies to create a strong and healthy community for young people and their families. For more information, contact Mary Williams at Region Ten Community Services Board, mary.williams@regionten.org.

### Charlottesville Area Alliance

The Charlottesville Area Alliance has as its mission to make the Charlottesville region the most age-friendly community in the country. Made up of 13 local organizations, the Charlottesville Area Alliance seeks to provide a singular regional voice for aging issues, as well as be an advocate and clearinghouse for resources. To start, the Alliance aims to measure eight factors that contribute to a healthy, age-friendly community as defined by the World Health Organization. For more information, contact Alliance co-organizer Marta Keane, CEO of Jefferson Area Board for Aging, mkeane@jabacares.org.

### Charlottesville Food Justice Network

The Charlottesville Food Justice Network is an emerging collaborative effort among local organizations working to build healthy and just community food systems for all Charlottesville citizens regardless of race, ethnicity, religion, nationality, age, economic background or geographic location. The network is in the process of exploring how it, its partners and

neighbors define a healthy and just food system in order to shape its future strategy. For more information, contact Jeanette Abi-Nader, Executive Director of City Schoolyard Garden, at jeanette@cityschoolyardgarden.org.

*THIS LIST WAS COMPILED AS OF JULY 2017*

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## LESSONS LEARNED HIGHLIGHTS

This section summarizes key *lessons learned* by coalition leaders about how to develop and maintain a healthy coalition during the two-year life of the Community Mental Health and Wellness Coalition *strategy, evaluation, leadership, governance and coordination* consulting project.

**Figure 1:** Lessons Learned Highlights

| Strategy | |
|---|---|
| | ➢ Coalitions are just as likely to have to navigate change as individual organizations, perhaps more so. Expect it, and **know that you will need to continually confirm shared vision and evaluate and adjust your strategy** in response to the emerging priorities of coalition partners who represent different community stakeholders, as well as new environmental trends such as the availability of new data or shifts in the funding landscape. |
| | ➢ **Regularly re-affirm mission, goals and action**. Re-visiting the frame is critical to keeping partners engaged and establishing the clarity needed to refine coalition scope and build an evaluation plan. |
| | ➢ Your **strategic plan should be created in multiple formats** (short and long) for use with different audiences (funders, board members, the public, the coalition itself). |
| | ➢ Start out by focusing on measuring only one or two indicators of outputs/productivity and outcomes/impact that are easiest to collect; **build up your data collection capacity over time**. |
| | ➢ Cultivate prospective donors early, even as part of the leadership team, to generate strong philanthropic partnerships and sustainable financial engagement. |
| | ➢ **Ensure you have a high-level of engagement**, through a consultant or internal capacity, **to translate strategy into an operations plan and then to manage implementation** by the coalition. |
| | ➢ **You need three key ingredients: governance structure, strategic clarity and consistent coalition commitment to yield community benefit**. |
| | ➢ **When building committees, it is a good idea to create written job descriptions** which include how the committees will be led and the process for conducting committee business. This ensures that those who are part of the committee know what the expectations are and how best to focus their work to support the coalition strategy. A link to the City of Promise's Steering Committee Manual can be found here. |
| | ➢ It is important that **trust and open dialogue are used when it comes to navigating competitive funding issues** between the coalition and the partner organizations. Seek input on the issue from coalition members via survey or individual interviews in advance of a group discussion or decision. **Establish fundraising ground rules while still forming the coalition, perhaps even as part of the coalition charter or memo of understanding** between the coalition partners. |

**Evaluation**

- ➢ **Start small, focus on data you can collect and create small data wins over time**. Build the data platform progressively as the coalition demonstrates an appetite and understanding for it and its use.
- ➢ A **coalition needs consistent leadership engagement, broad partner buy-in and regular data review and analysis** to ensure that its evaluation plan evolves to meet the needs of the coalition in charting impact.
- ➢ **Structure the data collected so it can tell a story** to the coalition partners and, ultimately, to the community. What is the cohesive, meaningful story about what the coalition wants to accomplish and what are the key data points to tell that story?
- ➢ Typically, a **coalition will consider three types of data**:  agency-level (ex. demographics), coalition health (ex. partner satisfaction, participation) and community-wide data (ex. graduation rates, teen pregnancy rates). The challenge with community-wide data is how to trace it back to the work of the coalition. Agency-level data may inform service provider adjustments, but may not be the best markers for broad coalition impact. Coalition health data is critical to tracking coalition partner engagement and the effectiveness of the coalition.
- ➢ **Two factors are critical to developing an effective evaluation plan**:  1) Take coalition partners' capacity for data collection into account in designing the system; and 2) Start by identifying data points that are easily accessible and most relevant to the coalition partners.  Once the initial data is successfully collected, lead the partners in learning how to use it. When you have built the competency and capacity within the coalition, add additional data to the mix.
- ➢ **Do not assume the same investment in conducting evaluation across all coalition partners**. Consider the level of engagement and different capacities for data collection among coalition partners before you create the tools and processes for evaluation.
- ➢ **Before you administer a coalition health survey, be sure that there is support among the survey participants for the scope of the survey**. Buy-in can be enhanced if coalition leadership takes time to advocate for the tool and to frame the value of the survey results in the context of the overall strategy.
- ➢ Y**ou need coalition partners who are willing to collect and analyze the data** consistently over time for it to be of any use.
- ➢ **Do not frame data challenges as "failures"** – if you see data that you want to change, consider it an opportunity for improvement, as well as empowerment of the coalition for success.

## Leadership

➢ **Coalition leaders must have the drive to achieve coalition goals, the skills needed for the work (which differs coalition by coalition) and the time available to do each**.

➢ **Stagger leadership tenure and transitions** so that you do not lose institutional history and founding investment all at once.

➢ **Engage in ongoing succession planning – to groom new coalition leaders** – so that the coalition can effectively manage a leadership transition.

➢ As part of the succession planning, **an honest discussion about the time needed to be an effective leader is critical** to ensuring you have leaders in place with the right amount of backbone support to do their best work for the coalition.

➢ **Build coalition relationships constantly, inside and out, and drive towards early wins to maintain coalition momentum**.

➢ Once you transition coalition leaders, look to **provide past leaders with a meaningful new role to keep them engaged**, particularly as advocates for the work.

➢ **Base steering/executive committee membership on ability and willingness to be a coalition leader**, not just on organization represented.

➢ **To enhance partner engagement, be succinct and communicate top-line information consistently** to the full coalition.

➢ **Make sure your leaders can allocate the time necessary to maintain forward momentum**, particularly if a coalition is in crisis.

➢ **Any coalition has to include systems leaders – those that focus on broad community benefit even if it does not directly impact their organizations**.

➢ As a coalition leader, **include the coalition work as part of your individual agency goals**. Ensure that your board of directors or employer not only support the work that you will be doing, but also that it be deemed a priority in the context of other leadership goals.

➢ **Make sure, too, that your leadership committee (executive or steering) is populated by individuals and agencies most invested in the work and success of the coalition**. Consider inviting potential leadership committee prospects to be part of the coalition in another capacity first so they develop an understanding of the work before they get engaged in coalition governance.

| | |
|---|---|
| **Governance** | ➢ **Make sure meetings are focused, responsive and make the best use of participants' time**. <br> ➢ **Develop a leadership succession plan from the start**. <br> ➢ **Do not assume coalition partner engagement**. Create clear expectations and incentives for participation and accountability among coalition partners. Not just in the charter, but also as part of the work plan. <br> ➢ **Populate your coalition with two kinds of coalition participants – deciders and doers**. Deciders may play leadership roles, such as serving on the executive committee, and doers are critical to carrying out the work of the coalition in committee, in their own organizations and in the community. <br> ➢ **Revisit the coalition charter and expectations** for steering/executive committee and partnership regularly (ex. 1x/year) and refresh when needed. <br> ➢ **Be intentional about outlining leadership structure**. Detail who is on the steering committee, for how long and the roles of all steering committee members while serving. <br> ➢ **A coalition works best if you understand why partners are coming to the table. What is in it for their organization?** These perspectives should drive the work of the coalition. All partners need to feel like they have a role, can make a meaningful contribution and are getting something out of participation. |
| **Coordination** | ➢ **Be clear about what kind of coordinating support is most needed**. Is it administrative? Do you need a coordinator who can be more strategic – ex. by providing coalition voice, managing evaluation, engaging partners and driving the coalition forward? Do you need a coordinator who can raise funds, write grants, or manage a budget? Do you need a coordinator who can collect, manage and interpret data? <br> ➢ **"Backbone support," however structured, is critical for maintaining coalition progress and forward momentum** both to keep it functioning and to hold participants accountable. <br> ➢ **There should be a website or cloud location where all key coalition documents are stored from the start, and where documents are updated on an ongoing basis to be current with operations, so you do not have to recreate coalition history**. <br> ➢ **Decide who will drive the coalition agenda** – is it a *coalition of the willing* which makes decisions and then looks to a coordinator to manage execution or will a coordinator play a leadership role in developing and driving the agenda? <br> ➢ **Develop coalition structure – committees, leadership and communication outlets – based on capacity** so it can be effectively managed and does not become unwieldy. <br> ➢ **Ask partners both what they want out of *and* what they will bring to the coalition**. The needs of all stakeholders should be taken into account in developing the direction, goals and strategy of the coalition. Coalitions should articulate the value of partnership at the outset, be clear about the role and expectations for partners and deliver on the promise of reciprocity in order to encourage active and diverse partnership. |

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## WORKING WITH CONSULTANTS

At times, your coalition may need specific expertise that does not exist within coalition partners.  It may be necessary to have an outside facilitator to help drive the coalition action plan forward, whether self-identified or at the suggestion of a funder, if you lack capacity or if you get stuck. For example, you may find that your coalition needs support for strategic planning, group facilitation, evaluation, communications, fundraising, structuring governance or just to help you assess the situation and ask the right questions. In addition to providing specific expertise, consultants can also offer an objective perspective that may add value when working with diverse partner organizations and stakeholders.

*Benefits* of working with a consultant:
➢ Provides a more objective and unbiased approach; not steeped in the initiative.
➢ Provides technical expertise not otherwise available.
➢ Provides the capacity to work more quickly than when using only internal resources.

*Costs* of working with a consultant:
➢ Potentially increases the price of the work.
➢ Requires regular communication with consultant and monitoring of work.
➢ Can lead partners to consider the work as not their "own" or not their responsibility.

In some cases, pro bono experts can be found in the community who can provide you with the support you need when you need it. Pro bono expertise is easier to find if you have existing relationships with consultants, perhaps even those who are part of the coalition.  Consultants are more likely to work pro bono if they can build professional credibility or expand their own networks through the work.  It also may be that you can source a consultant who will provide a discounted rate, or take on a scope of work for free with the possibility of future paid work, particularly if the consultant is invested in the issue and sees the potential for the coalition work to lead to important community change.

In other cases, it is more effective and efficient to hire a consultant to get the job done. Whether you are hiring an individual, or firm, or working with a university, a consultant can prove to be either a relief or a headache, depending on two factors: your preparation and the structure of the relationship.  The following tips will get you started:

✓ **Preparation**:  Before your coalition starts to recruit a consultant, make sure it has the following:

1. *Capacity*: It is important to be sure that your coalition has the capacity to work with a consultant, in the form of time, funding and commitment to work effectively with your chosen expert. Ask your coalition the following questions: Who do you need to be the key contact(s) for the consultant during the life of the project, whether because of their role or their expertise? Is this the right time to for the coalition to undertake the consulting project? How will the coalition pay for the consulting? If the funding has not been secured, are there new potential sources of funding that the coalition leadership might engage to fund the consultants work?

2. *Clear objectives*: In identifying if clear objectives have been established, ask the following questions:  Has the coalition taken the time to understand the specific goals it has for the consulting project? Is the goal to be more effective? To tackle a challenge that requires specific expertise? Or to objectively review its work? Will the consulting engagement focus on coalition-wide activities (such as strategic planning or building fundraising capacity) or will it have a narrower, tactical focus (such as creating a marketing plan or conducting client surveys)?

3. *Alignment:* Questions to consider when addressing alignment concerns:  Are coalition partners aligned around the consultant's work plan? Is it clear to all what the consultant's job will be while working with the coalition partners? Will coalition partners be available to the project when needed?

**Essential Resources** for information on preparation**:**

✓ [Selecting an Evaluation Consultant,](#) Centers for Disease Control
✓ [Working with an Evaluation Consultant](#), Rainbow Research, Minnesota Department of Health

➤ **Structuring the Relationship**:  Consultants can be found and hired in a variety of ways, including: word of mouth, issuing requests for proposals (RFP's), conducting interviews, short-term test engagements, checking consultant directories, utilizing funder or partner recommendations, or a combination of these. Like hiring for an employee, an important step is to check references and explore working style to confirm fit.

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Lessons Learned
Highlights

Working
with Consultants

Once you find your consultant of choice, it is critical to clarify the terms and expectations of the consulting project. You can do this in a letter of agreement or a more formal contract which should include project scope, cost, expected timetable and deliverables. If you expect the scope or deliverables to evolve as the project develops, this too can be a stated expectation in the letter or contract.

Once the consultant comes on board, key actions that will contribute to a successful consulting engagement include:

1. _Confirm_ the primary coalition partners who will work with the consultant. Review the anticipated time needed to successfully manage the consulting project with those partners. Make sure the coalition partners are in regular contact with the consultant throughout the engagement to answer questions and proactively troubleshoot when necessary.

2. _Share_ all relevant documents, such as coalition strategy, partner charters, fundraising goals, grant reports, or other related consulting reports, so that the consultant can more accurately diagnose what is needed. This will help the consultant pursue a realistic and value-added scope of work.

3. _Organize_ an initial meeting between the consultants and coalition partner liaisons to further refine the scope of work and to get action items on the calendar.

4. _Be transparent_ with the consultant, up front, if there is any resistance to the work within the coalition. Give the consultant the information needed to navigate any challenging coalition dynamics. Check in regularly with the coalition partners who are working most closely with the consultant, informally, or as part of a more structured evaluation process, to confirm progress.

5. _Manage_ the scope of work actively. If new issues arise, be proactive about deciding whether the consultant's scope of work should be revised or whether the issue should be handled by others within the coalition. Do not engage in a "scope creep" (uncontrolled changes or continuous growth in a project's scope) discussion after the fact.

➢ **Transitioning to Internal Capacity:** Talk with your consultant about their exit strategy. Be careful not to transition to internal capacity too soon. Your consultant should be able to provide you with a proposal for how the initial work and capacity building will

happen, as well as how they plan to decrease the coalition's need for their services by building internal capacity and confidence. For example, if you've hired an evaluation consultant, it may make sense to go through one full cycle of data collection and analysis before going it alone, especially since measuring impact for coalitions is an ever evolving process. Note too that you can seek stepped down levels of engagement with a consultant once the initial scope of work is complete. You can opt to invite the consultant back, as a knowledgeable observer, and/or use the consultant on an ad hoc basis to get feedback, an outside perspective, or to troubleshoot emerging challenges.

**Essential Resources** for information on working with consultants**:**
- ✓ Nonprofit Leaders Guide to Hiring & Engaging Consultants, The Association of Consultants to Nonprofits
- ✓ Working with Consultants, Strengthening Nonprofits: A Capacity Builder's Resource Guide
- ✓ Working with Consultants, Montana Nonprofit Association
- ✓ Knowledge Base: Hiring a Consultant, Grantspace
- ✓ How to Hire a Consultant: A Guide for Nonprofits, Elaine Fogel, Stanford Social Innovation Review
- ✓ Finding the Right Pro Bono Consultant, Taproot Foundation

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**Local Spotlight:** There are consultants who specialize in working with multi-stakeholder, multi-sector collaborations. Some focus on specific issues, such as the environment or school readiness, while others specialize in group facilitation or other technical skill sets, such as evaluation or governance. In our region, we are fortunate to have consultants with significant expertise in coalition work. Below we list several:

✓ The Center for Nonprofit Excellence offers consulting services via CoLab. CoLab is a collaboration learning lab designed to build the knowledge and skills surrounding partnerships.

✓ Maryfrances Porter of Partnerships for Strategic Impact has a consulting practice that specializes in building on existing strengths to rigorously assess needs and strengths, and evaluate the impact of organizations, programming, initiatives and policies to improve implementation and create sustainable change.

✓ Saphira Baker of Communitas Consulting focuses her consulting on building successful organizational and community change initiatives.

✓ Russ Linden of Russ Linden & Associates is a long-time collaboration thought leader, author of collaboration texts and facilitator for collaborative work.

✓ The University of Virginia's Institute for Environmental Negotiation utilizes its considerable facilitation and mediation expertise to empower communities to create shared environmental solutions via a collaborative approach.