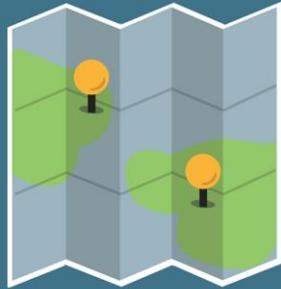


**ACTION TO IMPACT:**



**A COALITION-BUILDING  
ROADMAP**

# Action to Impact:

## A Coalition-Building Roadmap

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Maryfrances Porter, President and Founder  
Partnerships for Strategic Impact

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Summer 2017



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**Partnerships for Strategic Impact**

*Leveraging collective expertise for impact.*



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## ACKNOWLEDGEMENTS

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This Roadmap is the end result of a multi-year governance and evaluation consulting pilot with the [Community Mental Health and Wellness Coalition](#) (CMHWC) in Charlottesville, VA.

The authors wish to give special thanks to CMHWC leaders past and present: Erika Viccellio, Executive Vice President, United Way Thomas Jefferson Area; Karen Osterhaus, Research, Evaluation, Grants Coordinator, Region Ten Community Services Board; Elizabeth Irvin, Executive Director, The Women's Initiative; Erin Tucker, Executive Director, On Our Own; Kaki Dimock, Director of Human Services, City of Charlottesville and Mike Murphy, Assistant City Manager, City of Charlottesville. These leaders have not only guided the CMHWC to achieve real community impact, they have also been true partners in learning throughout the project. They have invested personal time, valuable insights and feedback into the Roadmap with the collective goal of benefiting other coalitions attempting community change in our region. This Roadmap is a true collaborative effort. Any errors contained within, however, are the sole responsibility of the authors.

This Roadmap would not be possible without the participation and partnership of the entire CMHWC, the CMHWC Data Committee and especially the efforts of the staff at the Charlottesville Free Clinic, Region Ten Community Services Board, The Women's Initiative, Thrive, and On Our Own, who worked with Partnerships for Strategic Impact to build a Strategic Impact Map™, to identify impact indicators and to collect and wrestle with the data.

Very special thanks are extended to the [City of Charlottesville](#) and the [Charlottesville Area Community Foundation \(CACF\)](#) for providing partial funding for this project, as well as additional staff time contributed by the Center for Nonprofit Excellence (CNE) and Partnerships for Strategic Impact™ (PSI) which more than doubled the amount of funding contributed. We owe a particular debt of gratitude to Christine Jacobs, CNE's summer 2016 intern and a graduate of the University of Virginia's Frank Batten School of Leadership and Public Policy, who brought her considerable project management skills, web design creativity and sense of humor to the task of: editing, formatting, synthesizing, coordinating, designing and cajoling the authors to complete this Roadmap. We cannot recommend her enough. Special thanks also to CNE student interns and University of Virginia undergraduate students Courtney Morgan, Erin Comerford and Fiona Dale, each of whom enthusiastically gave of their time and their editing and creative talent to bring this project to life.

This Roadmap relies on the significant expertise of practitioners, consultants, thought leaders and experts across the country who are engaged in collaborative communities of practice. We encourage anyone using specific resources included in this Roadmap to cite their work. Should you use or cite the information in this report, we ask that you use the following citation:

Action to Impact: A Coalition-Building Roadmap, Cristine Nardi, Author; Maryfrances Porter, Author. (Charlottesville, VA, 2017)

## WELCOME TO ACTION TO IMPACT: A COALITION-BUILDING ROADMAP

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*Action to Impact: A Coalition-Building Roadmap* is designed by and for local, grassroots nonprofit organizations to help you decide whether building a coalition is the right collaborative strategy for you. Whether you are a *nonprofit* organization seeking to better understand your capacity to collaborate, or a *group* of organizations investigating the potential for better results by tackling a common challenge, or an *existing coalition* looking for advice and guidance to build momentum, identify new strategies to improve work and assess progress, *Action to Impact: A Coalition-Building Roadmap* is for you. It guides readers in implementing a specific type of collaboration – also known as the collective impact model – in which organizations, often cross-sector, come together as a coalition to more effectively solve complex community challenges.

The *Roadmap* provides concrete, actionable and reflective guidance on how to create a coalition structure that is realistic and effective, and how to work in coalition to achieve your common goals. It has information for coalitions at all stages of development – from assessing feasibility, to launching, to taking community action, to achieving impact. The Roadmap includes *how to* information, hand-selected articles and resources for a deep dive into the topics presented and the essential information you need to figure out what resources, expertise or even consultants you may need to position your coalition for success.

This *Coalition-Building Roadmap* combines current research and practice tools on coalition building based on lessons learned from a multi-year pilot project with the [Community Mental Health and Wellness Coalition](#) (CMHWC), in Charlottesville, Virginia, as well as the authors' combined experiences with coalitions over the last 20 years. The Roadmap is tailored to local coalitions, but the key principles are readily applicable to other communities.

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Users will find this Roadmap helpful at any stage of coalition development and are encouraged to move between the READY, SET, GO and SIDE TRIPS sections as needed to build the strongest, most effective coalition.



**READY** This section guides you in assessing whether you have the basic requirements for an effective coalition. It details how to ensure a firm foundation by conducting several key assessments. It describes how to conduct needs assessments and details the purpose, scope, and types of needs assessments. *If you are trying to determine your organization's readiness, whether a coalition is the right model and whether the environment is primed for the benefit of a coalition, the READY section is for you!*



**SET** This section describes essential building blocks coalitions need for success. It details how to set a frame for creating a coalition vision, mission and goals. It guides you through planning for impact by addressing why it feels hard to measure and what approaches can be used to help. Finally, it will support you through how to harness a range of resources by focusing on governance, committing to systems leadership and planning for the funds needed to do the work. *If you are ready to form a coalition and are seeking guidance on how to establish the building blocks for success, the SET section is for you!*



**Go** This section guides you in effectively managing a working coalition by tracking productivity and impact and engaging in data-driven strategic planning. It outlines how to: survey coalition health, develop effective committees, communicate effectively and sustain resources. *If you are ready and set and seeking guidance on how to move through the day-to-day processes of coalition work, the Go section is for you!*



**SIDE TRIPS** This section allows you to further explore effective collaboration. You can take a deeper dive into the Key Virtual Resources that were used in the development of the Coalition-Building Roadmap. This section also describes local coalitions already tackling this work, for your reference. Further, it provides a summary of all Lessons Learned from working with local coalitions. Finally, it provides a section on how to know when working with a consultant is the right move for your coalition. *If you are looking for information on any of these issues, the SIDE TRIPS Section is for you!*

### THINGS TO LOOK OUT FOR...

While using the Action to Impact: A Coalition-Building Roadmap, there are several valuable things to look out for. These resources will be highlighted with the following icons:



Keep an eye out for **Local Spotlights** which describe how *local* coalitions have approached the work!



The **Resources** links will highlight essential articles, tools and templates that you can use right now!



Throughout the Roadmap, look out for **Lessons Learned** from the [Center for Nonprofit Excellence](#), [Partnerships for Strategic Impact](#) and the [Community Mental Health and Wellness Coalition](#) project! A summary of all the [LESSONS LEARNED](#) can be found in the SIDE TRIPS section!

The authors have highlighted some carefully curated online resources throughout the Roadmap. To access these resources, please use the online version of the Roadmap, available at [www.thecne.org/engage/virtual-resources/cne-toolkits/](http://www.thecne.org/engage/virtual-resources/cne-toolkits/).