

## **Key Elements of a Successful Coalition**

The following information is based on the experience of Mary Anne Kelly and her colleagues at the Southwestern Pennsylvania Partnership for Aging as well as the Pioneer Network's experience in providing technical assistance to individuals and organizations establishing new coalitions and sustaining existing coalitions. This information is not intended to be prescriptive or a one-size-fits all guide to what will work or how you should proceed. The steps taken in each state should be based on your own unique culture and created by the stakeholders at the table.

- **Articulating the Need for the Coalition** – All of the existing state culture change coalitions started because someone (one person or a number of people) recognized a need to work together with other individuals and organizations to advance culture change in their respective states. Many (not all) of the coalitions were established as a result of the Saint Louis Accord conducted in 2005 by Quality Partners of Rhode Island and the Pioneer Network which brought together state long-term care stakeholders (provider associations, quality improvement organizations (QIOs), state long-term care ombudsmen, and citizens advocacy groups) to educate them about culture change and encourage them to establish coalitions in their respective states. For those states that did not already have a culture change coalition, the QIOs were asked to be the conveners.
- **Identifying Stakeholders to Invite to the First Meeting** – It is important to have representation from all of the state long-term care stakeholders that exist in your state which may include provider associations, QIOs, state long-term care ombudsman, state survey agency, direct care worker association, citizens advocacy groups, academia/researchers, culture change consultants, and foundations interested in culture change. You may also want to invite representatives from your CMS Regional Office and individual providers that are on their culture change journey. It is important to be as inclusive as possible for your first meeting. If any of the above mentioned groups do not exist in your state or are not interested in participating, concentrate on those committed to advancing culture change in your state.
- **Establishing a Shared Agenda** – At the first meeting, ask each participant to not only introduce themselves and their organization (if they are representing an organization) but to state why they believe there is a need for establishing a state culture change coalition. Begin development of a vision statement at the first meeting and ask for volunteers to participate in a vision statement task force that will report back at the next meeting. At the second meeting, finalize the vision statement and begin developing the mission statement for the coalition. Ask for volunteers to participate in a mission statement task force that will report back at the next meeting. A set of values should also be adopted (many of the existing coalitions have adopted the Pioneer Network's Values and Principles). Some coalitions have used an outside facilitator for the first meeting or so to help the group do its work. This can neutralize any politics or personalities as well as aid

in moving toward developing shared understandings a culture of consensus decision-making.

- Developing a Shared Understanding of how the Coalition will work together - Some coalitions have made a conscience decision not to develop a leadership structure or have bylaws but do have a coalition accord document and a shared understanding of how the group will work together. Most coalitions have defined how they will make decisions. Some coalitions have a Steering Committee and/or a Board of Directors if the coalition is incorporated as a 501 C-3 (not for profit) organization. These coalitions have identified a chairperson who is a strong leader with a strong public voice who models the behavior they wish to create. They have secured commitments from others present at the first meeting to be a member of the Steering Committee. Some coalitions have officers and other leadership positions, terms of office, etc. and have developed by-laws or another governing document for the Steering Committee (all Boards of Directors must have by-laws). (see sample by-laws and Accord documents).
- Articulating the Message – Focus on developing the coalition message/tag line; choose a logo (see state coalition web sites for examples).
- Developing a Strategic Plan – If possible, use an outside facilitator for a strategic planning session and develop the plan that will guide your coalition’s work for the next year or so. Recognize that starting small is ok; choose realistic, short term projects for initial work while keeping longer term goals in sight.
- Paying Attention to Coalition Basics – Establish a regular meeting schedule; share meeting business via complete and timely distribution of meeting minutes.
- Working the Coalition – Provide educational opportunities for Steering Committee and/or Board; promote networking and information sharing at every meeting; foster growth of interpersonal relationships and build a sense of community and connection among Steering Committee/Board members as well as a sense of shared ownership.
- Establishing Active Working Committees – Many coalitions have the following committees: Education, Communications, Development, and Public Policy but this is not an all-inclusive list. Establish task forces as needed. A Steering Committee or Board member should be the Chairperson of each committee and task force but committee/task force members do not need to be Steering Committee or Board members. Use committees and task forces as a way to get others involved in your coalition and for succession planning for the Board or Steering Committee.
- Attending to Financial Issues – Establish a coalition budget; form a Development/Fund-raising Committee; solicit local or state foundation and corporate grants (most foundations and corporations only award funds to 501 C-3

organizations so if your coalition is not one, explore using another organization's 501 C-3 status); determine other ways to raise revenue for Coalition activities (e.g., accessing Civil Monetary Penalty (CMP) funds, registration fees, sponsorships and/or exhibitors for coalition conferences); decide whether the coalition will have a membership structure with fees.

- **Watching Little Items Easy to Forget Along the Way** – Develop a mechanism for orienting and updating new members on the history and past successes and challenges of the coalition; making sure there is always room for new ideas within your coalition; regularly reviewing coalition resources and productivity to ensure you are keeping pace with objectives, ideas and commitments; recognizing that levels of support and involvement of Steering committee/Board members will vary and that coalition work is usually an “extra” on top of members’ jobs; publicly recognizing and thanking coalition members and supporters; celebrating coalition accomplishments
- **Re-assessing Need for the Coalition, Membership, Leadership and Activities** – Establish a schedule to regularly assess the need(s) that created the coalition; regularly assess membership composition; if there is a general membership (in addition to the Steering Committee and/or Board), regularly assess whether members’ needs are being met; assess coalition effectiveness; identify barriers to the coalition’s vision.
- **Reaching Out to Like-Minded Others** – Network with other state coalitions through the Pioneer Network; attend the Pioneer Network conference. The Pioneer Network is committed to facilitating networking among the coalitions and to assisting you in advancing culture change in your state. Working together, we can change the culture of aging in America!

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