



Model Workshop Trainers' Manual:

Building Coalitions for Tolerance and Non-Discrimination

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Introduction & Preparation

This model workshop demonstrates how to use the lessons and tools provided in ODIHR’s new manual, “Coalition Building for Tolerance and Non-Discrimination: A Practical Guide”¹ (the Guide), to launch a new coalition. It is intended for an audience of practitioners with a range of experience levels who seek to start a coalition focused on promoting tolerance and non-discrimination.

Goals of the workshop

- ▶ To familiarize participants with tools, resources and facilitation techniques that support coalition building;
- ▶ To educate participants about the best practices for building and sustaining coalitions;
- ▶ To support participants’ efforts to start coalitions in their home countries and reinforce their sense that they can successfully do so; and
- ▶ To establish a network for individuals and organizations building coalitions across the OSCE region.

Materials

- Two to four flipcharts and stands;
- Markers;
- Masking tape;
- Copies of the Guide and printed handouts of relevant tools provided in the annexes; and
- Computer and video projector.

¹ Like the Guide, Tom Wolff and Debra F. Erenberg both contributed to drafting this manual.

Design – 2 days

This workshop is intended to be delivered by two or more facilitators over the course of two days. If begun at 9:30, both days will run until 17:30. If your schedule differs, be sure to adjust the timing of breaks so that meals occur at an appropriate time and so that participants have enough time to eat, visit or take care of other needs.

Day	Time	Exercise
Day 1	09:30 – 10:00	Welcome & Introductions
	10:00 – 10:20	Agenda, Goal Review & Agreements
	10:20 – 10:45	Introduction to Coalitions
	10:45 – 11:00	Break
	11:20 – 12:00	Ice Breaker Discussions
	12:00 – 12:45	Spectrogram Exercise
	12:45 – 14:00	Lunch Break
	14:00 – 15:00	Visioning Exercise
	15:00 – 15:45	Building the Coalition: Stakeholder Analysis
	15:45 – 16:00	Break
	16:15 – 16:45	Role Play: Stakeholder Outreach & Recruitment
	16:45 – 17:15	The First Meeting
	17:15 – 17:30	Day 1 Closing
	Day 2	9:30 – 10:00
10:00 – 10:15		Coalition Structure
10:15 – 11:15		Coalition Governance
11:15 – 11:30		Break
11:30 – 12:45		Coalition Planning
12:45 – 14:00		Lunch Break
14:00 – 15:00		Sustainability
15:00 – 16:00		Tracking & Evaluation
16:00 – 16:15		Break
16:15 – 16:30		The Life Cycle of a Coalition
16:30 – 17:00		Tools & Resources
17:00 – 17:30		Wrap-Up & Evaluation

Note: This agenda allows enough time for each exercise so that facilitators should not have to worry about starting a little late or taking longer than expected to return from breaks. This is to be expected and is desirable (up to a point) given that one of the workshop’s goals is to build relationships.

Symbols



This symbol means “what you DO.”



This symbol means “what you SAY.”



This symbol means “what you WATCH FOR.”
(So that you can notice things that make you a better facilitator).

Information that appears in text boxes is intended to inform and enhance the trainer’s presentation, but not to be read to the participants.

Pre-Workshop

Before the workshop, distribute the survey found in Annex 1 via email or online survey tool. If time allows, feel free to personally contact the participants to elicit their responses.

The training team should review the responses and discuss:

- ▶ **What is the experience level of the group?** Do most participants have a similar amount of experience? Should the training outline be adjusted to account for the group having more or less experience? If there are vast differences in experience, how can more experienced participants share their expertise with less experienced peers?
- ▶ **Which participants are doing similar work or facing similar challenges?** Prior to the workshop, determine the groups that you will put participants in, considering their pre-training evaluations. Use this opportunity to maximize productivity and mitigate possible tensions.
- ▶ **Do these conversations raise any concerns** about possible group dynamics or facilitation challenges? Talk through potential issues and how the team will handle them.

The Guide

Prior to delivering this workshop trainers should read and be familiar with, the Guide as well as the resources listed in Appendix 1 of the Guide. Familiarity with the Guide and Appendices will help the trainers tailor the workshop to their respective audiences.

Model Workshop Trainers' Manual: **Building Coalitions for Tolerance and Non-Discrimination**

Day 1

09:30 – 10:00	Welcome & Introductions
10:00 – 10:20	Agenda, Goal Review & Agreements
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15:45 – 16:00	Break
16:15 – 16:45	Role Play: Stakeholder Outreach & Recruitment
16:45 – 17:15	The First Meeting
17:15 – 17:30	Day 1 Closing

Welcome & Introductions

TIME: 30 MINUTES

-  Welcome participants, introduce yourselves and preempt relevant logistical questions.
-  Ask participants to introduce themselves and briefly address where they are from, what they do within their organizations and whether they have any experience working with coalitions. Also, ask them to share what they are hoping get out of the workshop.
-  Write the expectations shared on the flipchart. This will allow you to further tailor the workshop and debrief the exercises to meet participants' needs. Use this list as a reference point throughout the workshop.

Key Messages

This guide contains three key messages: (1) coalitions can make a difference in creating more tolerant and just societies; (2) coalitions should be models for the world they seek to create; and (3) a coalition is a web of relationships. It is important that those creating a coalition get to know coalition members as people and understand their histories and struggles. This will not only strengthen the coalition's work, but will give it more meaning. It will also increase members' sense of shared commitment to each other and to the changes they are jointly creating.

Agenda, Goal Review & Agreements

TIME: 20 MINUTES

-  Review the agenda and discuss the goals with the participants. Use the expectations written on the flipchart from the introduction session to contextualize the training. Mention the timeframe for breaks and lunches, explain where meals and coffee will be served, and where the restroom facilities are located.
-  Many of the activities in this workshop serve two purposes. First, they support one or more of the goals previously discussed for the workshop itself. Second, they provide a model for how to conduct a similar activity when the participants start their own coalitions.

For example, one activity that the participants will want to undertake with their coalition when they come together for the first time is to establish a set of ground rules or agreements that will guide how they interact with one another.

This sets the tone for mutual respect and a safe space, and provides written guidance that anyone can refer to if they feel like someone is not following the established norms of behaviour.

Running the Exercise

 Have the group brainstorm a list of rules, agreements or sensitivities that they would like to help guide the discussion. Ask participants to explain their ground rules if needed to be sure everyone at the workshop understands. Write ground rules on the flipchart.

 You might suggest:

- One person speaks at a time;
- Listen to what other people are saying;
- Silence cell phones, step outside to answer an urgent call;
- No mocking or attacking other people's ideas;
- Agree to disagree – it is okay if people do not see eye-to-eye on everything;
- Respect each other and do not judge; and
- “Step up/Step back” – this is a technique to help those who do not usually speak much at meetings to *step up* and participate more, and to remind those who speak a lot to *step back* and give others a chance to be heard.

 Make sure everyone agrees to the ground rules at the end of this brainstorming session.

 Make it clear that the plurality of personal and professional experiences will enhance the workshop. Hang the final list on the wall where it will be visible throughout the workshop.

Introduction to Coalitions

TIME: 25 MINUTES

 Write the word “coalition” at the top of the flipchart.

 Ask participants to define a “coalition” in their own words.

 Write down brief summaries of what people are saying. If the group stops offering answers before key concepts have been noted, ask leading questions such as, “If two organizations decide to put on an event, is that a coalition? Why not?”

While running this exercise it is useful to remember the definition of a coalition:

Defining “Coalition”

The word **coalition** refers to a group formed when multiple entities agree to work together towards a common goal. A coalition is a form of collaboration or partnership for a specific purpose. It differs from the common understanding of the term “partnership” in that coalitions involve more than two partners. It also differs from a dialogue – an activity adopted by many coalitions for tolerance, but which does not constitute a coalition except as part of a broader strategy in which participants work together towards a shared goal.

Differences and Commonalities

Coalitions can operate at the local, national, regional or international levels. The geographic focus of a coalition may shift over time as policy developments at one level threaten goals at another level, or as the coalition sees opportunities to replicate a successful model.

Coalition goals vary widely, but often involve one or more of the following: (1) **influencing** or developing public policy around a specific issue; (2) **changing** people’s behavior; and (3) **building** a secure community. The term “security” generally refers both to the community’s physical security and its social and psychological security and, as such, encompasses violence prevention, diversity, education and youth development, among other areas.

-  If someone says something that doesn’t fit with how the Guide defines a coalition, engage in a discussion with the participant and the group with the goal of making their understanding of coalitions align with that of the Guide. If you are unable to reconcile the difference, acknowledge the validity of the participant’s contribution but explain that for the purpose of the workshop you will be working with the definition offered in the Guide.
-  Discuss with participants why people form coalitions. Write down their responses on a flipchart. When they start to slow down, ask why people form coalitions to address intolerance and discrimination, specifically? Add those responses to the list.

Why Coalitions?

There are many reasons why organizations and individuals choose to form coalitions. The most common is that they can accomplish more together than they

could alone. The more complex the problem, the more resources, experience, skills and connections it will take to address it. By bringing together partners with a variety of perspectives, coalitions can develop and implement powerful, innovative and inclusive strategies that can lead to significant change.

At its most basic, coalition building is about doing together that which cannot be done alone. The problems of intolerance and discrimination are deeply embedded across the OSCE region. Addressing these problems requires the efforts of many parties and cannot be accomplished in any large measure by just one group acting on its own. This is the importance of building coalitions.

Unlearning prejudices that have developed over centuries requires changes at all levels – within individuals, families, institutions, communities and, ultimately, societies. Coalitions may choose to approach the problem on one or more of these levels. Regardless of the approach, a productive and respectful partnership must be formed with the people who are most directly affected by the issue: those who are the targets of prejudice, discrimination and intolerance.

- ▶ Ask the group to name some characteristics of successful coalitions. What is important for a coalition to succeed? Write down their responses.
- ▶ You might suggest:
 - A clear vision and mission: Having an explicit vision that is created and shared by the whole coalition is critical to success.
 - Action planning: If the coalition is to enact changes, it must draw up and implement action plans to realize its vision.
 - Developing and supporting leadership: Successful coalitions understand that different voices can foster trust and legitimacy among different beneficiaries. They work to identify leaders across all coalition partners, continually develop leadership within the coalition, and recognize that sharing leadership strengthens the coalition's ability to achieve its goals.
 - Documentation and ongoing feedback: The coalition must track its activities and outcomes and provide regular feedback to all coalition members.
 - Technical assistance and support: The most successful coalitions recognize when they need help and seek advice from consultants, outside facilitators and peers conducting similar work.
 - Securing resources: Coalitions require some resources to be successful. This may include hiring dedicated staff or acquiring funds to organize events,

or having the means to print materials and maintain a website. These resources may be secured through fundraising or by collecting in-kind contributions from coalition partners.

- Making outcomes matter: In successful coalitions, results matter most. It is critical never to lose sight of how the coalition's work will lead to changes in line with its vision.

Break

TIME: 15 MINUTES

Ice Breaker Discussions

TIME: 40 MINUTES

Goals

- ▶ To get participants thinking about the principles of coalition building in their respective contexts.
- ▶ To allow participants the opportunity to network and share experiences.
- ▶ To get everyone talking. People who are more reserved or shy are more likely to speak up in the group if first given an opportunity to “find their words” with a smaller audience.

Running the Exercise

 Assign people to the groups as agreed upon with your team prior to the workshop. Participants will stay in the same groups for the remainder of the workshop.

 Have each group appoint someone to take notes and report back on the group's responses. Give the groups about ten minutes to talk among themselves about the following questions:

- What are the greatest threats to tolerance and non-discrimination in your society?
- What specific topic could your coalition focus on?
- What strategies could a coalition use to address that topic?
- What are obstacles that a coalition may face in addressing that topic?

 At the end of the designated time, call on each group to give their responses to the first question. Write the answers on a flipchart. Go through the rest of the questions using the same process.

-  Ask if anyone has any observations they would like to share based on what they've heard.
-  Observe any common themes that arose. Note these issues and examples and address them later in the day in the respective sessions.

Spectrogram Exercise

TIME: 45 MINUTES

Goals

- ▶ To get participants thinking about the live questions and controversies related to the work of coalitions.
- ▶ To enable participants to understand that there is no single, authoritative solution for coalition building.
- ▶ To allow participants to see that differing opinions can contribute to the success of coalitions.

Running the Exercise

Instruct the participants as follows:

-  I am going to read you some questions that ask you to decide where you fall along a continuum. If you feel like you completely agree with the statement, please move to the left side of the room. Conversely, if you completely disagree with what you hear, you should move to the right side of the room. Then we will have the opportunity to hear from people about why they have placed themselves where they are.

There are no “right” or “wrong” answers. This is meant to make us examine our own beliefs and strategies and learn from others. Don't worry if the two ends of the spectrum don't seem mutually exclusive. Just place yourself along the continuum as best as you can, depending on how closely this reflects your views. You might find that after hearing from others you will want to move to a new place along the spectrum. Feel free to do so.

-  Write “completely agree” on a flipchart and move it to the left side of the room. Write “completely disagree” on another flipchart and move it to the right side of the room.

Read the statements below to elicit responses from the group. Feel free to tailor these statements to the specific context, but be sure to address scenarios where there is no clear-cut right or wrong answer.

- “I am willing to work with anyone who shares the goal of creating a more tolerant society, even if we don’t share the same values on anything else.”
- “The concept of tolerance and non-discrimination is objective, and not subjective. It means the same thing to everyone, everywhere.
- “You should never start a coalition unless the people most directly affected by the issue are at the table.”
- “Individuals or organizations not affected by the issue that a coalition seeks to address should not take part in the coalition.”
- “Smaller, more specifically focused coalitions are likely to be more effective.”
- “A coalition is always an effective solution to addressing tolerance and non-discrimination.”

After people have placed themselves along the spectrum for each question, conduct quick conversations with two to three participants, depending on time available. Try to get someone from both extremes and the middle, asking for volunteers to share why they picked their spot on the spectrum, and try to talk to everyone by the end if possible.

The purpose of the exercise is to allow for the participants to share why they placed themselves where they did on the spectrum, and to be able to share their opinion with the other participants. To evoke answers with more substance try to use open questions, such as “Why do you agree/ disagree with the statement?” or, “How might your position on this question affect the work of a coalition you might want to create?”

Lunch Break

TIME: 75 MINUTES

Visioning Exercise

TIME: 60 MINUTES

-  Ask participants to sit with their previously assigned groups.
-  For the purposes of this exercise, each of your small groups is now a newly forming coalition. Use the sample descriptions of a coalition below for each group. Sample descriptions, located in Annex 2, can be printed and distributed to participants.

Vision Statement

A vision statement is a short proclamation that summarizes your coalition's dream for the future and which you will be able to use to communicate with the broader community. Vision statements should ideally be broad enough to include various viewpoints, inspiring and uplifting, and easy to communicate. "Education for all" or "peace on earth" are basic examples of vision statements. Mission statements are similar to vision statements but more concrete. A mission statement should describe what the group is going to do and why it is going to do that. Ideally, they should be concise, outcome-oriented and inclusive.

* *The following organizations are fictitious.*

Example: The Teaching Alliance works to promote human rights, tolerance and diversity through education about the Holocaust and anti-Semitism through media literacy. The network has developed teaching materials and methodologies to empower educators, librarians, archivists and others to take an active role as educational multipliers and effectively promote and share information that leads to changes in attitudes and behaviour.

Example: The Eurasian Council of Interfaith Women has worked with the Media Diversity Institute and several other civil society organizations on the "Get the Bullies Out!" project to encourage young people to combat discrimination and religious intolerance on social media. The current phase of the project includes monitoring and responding to diverse forms of hate speech, including anti-Muslim and anti-Christian sentiments, and attempts to turn public opinion against migrants and asylum-seekers.

Example: A large group of the most active members of an interfaith coalition throughout Central Asia formed a non-profit organization called Learning through Solidarity. The organization provides integration workshops for recently arrived refugees and operates a community centre that brings together long-time residents and new arrivals to build understanding, increase economic opportunities and address prejudice.

Example: The Baltic Council Against Xenophobia hosts webinars and massive open online courses that feature tools on organizing to combat racism and examples of ways that groups from around the world have come together to achieve political change.

Example: The Central European Hate Crime Recording Network is made up of 22 civil society groups, with various European Ombudspersons as observers. The network was formed to help fill gaps in official data collection systems and to address the need to better co-ordinate civil society's efforts in recording hate crimes. The coalition publishes an annual report on hate crime incidents in several European countries.

Running the Exercise

-  Write the scenario and questions from “Part 1” and “Part 2” below on two separate flipcharts.
-  Instruct the participants to think through the scenarios and questions with their groups.

Part 1: Imagine that we are now five years in the future, and everything has gone right for this coalition.

- How would we describe the world we are seeking to co-create?
- How would you make this vision come true?
- What opportunities can we seize?
- What are the supporting factors? How do we strengthen the supporting factors?

Part 2: Imagine your disaster scenario.

- What seem to be the most significant and probable risks?
- What are the forces working against us? How do we reduce those forces?

-  Answer any questions that may arise as groups are discussing the questions.
-  Have each group report on both of their scenarios, taking notes on the flipchart. Based on these scenarios, ask the group to identify key factors of success and points of vigilance.

Building the Coalition: Stakeholder Analysis

TIME: 45 MINUTES

-  Ask the participants to stay in their groups. For the purpose of this exercise they will continue to simulate membership in the previously assigned coalitions.
-  This exercise is devoted to identifying who should be part of a new coalition. Come up with a list of individuals and institutions that you will reach out to.
-  Distribute a handout with the Stakeholder Identification Process Flowchart found in Annex 3 and walk through the process. Ask if there are any questions. Then give participants time to go through the process with their small group.
-  Walk from group to group and offer suggestions if anyone seems to be struggling or if they seem happy with a small and limited list. Notice if anyone seems reluctant to build a broader or more inclusive coalition.

-  Ask each group to report back on whether they came up with surprising groups to reach out to or types of entities that they hadn't considered before, such as law enforcement, teachers, judges, media personalities or professional organizations.
-  Ask the participants to prioritize their outreach and think through why different stakeholders might want to be part of their coalition.
-  Distribute a handout with the "Stakeholder Analysis Worksheet" found in Annex 5 to each group. Review the worksheet and ask the groups to fill in at least three columns. See if there are any questions.
-  Walk from group to group and offer suggestions if anyone seems to be struggling or if they seem happy with a targeted list.
-  When everyone has completed the task, ask if anyone would like to share what they filled in for one of their potential coalition members. Discuss the potential barriers they might encounter in bringing particular individuals or groups into the coalition. Ask how these barriers can be overcome.

Break

TIME: 15 MINUTES

-  Before your break, ask for six volunteers for an upcoming role playing activity. Ensure gender parity. Pair the volunteers into three groups of two. Hand out the role playing scripts found in Annex 4. After each pairing has had a chance to read their scripts, meet with each pairing individually and answer any questions they may have. Explain to the pairings that each simulation is intended to take two to three minutes.

Role Play: Stakeholder Outreach & Recruitment

TIME: 30 MINUTES

-  During the break, set up two chairs facing each other at the front of the room.
-  Now that you've started to prioritize the stakeholders you'd like to invite to join your coalition and thought about why *they* would want to be part of the coalition, let's role play some scenarios that could come up when you first meet with them to discuss the coalition. Several volunteers have graciously agreed to simulate a very familiar scenario for coalition members.
-  Invite team one to the front of the room and ask them to initiate the simulation.
-  Let's all give them a round of applause for volunteering! Now, what did you

notice that first volunteer did well? What suggestions do you have for ways to improve?



Go through this process with teams two and three. Debrief in the same way as above.



Ask participants for their ideas about other strategies that can be used to reach out to potential stakeholders:

- Social media;
- Public event;
- Community meeting, etc.



Ask participants why some of the stakeholders might not say yes. Does anyone have thoughts on how these coalitions should respond if the stakeholders they invited turned them down?

Why stakeholders may not be interested

Not all potential members will want to join the coalition. It is important to accept this, but also to ask them about their concerns and to listen carefully to the subtext behind their words. The following is a number of reasons why people decline, and each may require a somewhat different response.

Concerns with the coalition's approach: Some people may have concerns about how coalitions approach a particular issue. If this seems to be the case, it is a good idea to open a dialogue with them and explore the issue further. Examine whether there is anything about the language the coalition uses, the strategies that it plans to employ or its current leadership that seems unwelcoming or inappropriate to those who experience discrimination and intolerance.

Wait and see: Some people and organizations will never join a brand new coalition. They may consider themselves too busy or simply want to see how things develop before they invest time and energy into an untested initiative. If they are generally supportive but still hesitant to join, ask if they would like to be added to the coalition's mailing list so that they can keep track of what's going on, or ask if the coalition can approach them at a later date.

Issue owners: It may be that there are people already doing work similar to, or even overlapping with, the work envisioned by the coalition. Many of these people will welcome the added legitimacy and support that a broad coalition can bring, but others may feel that the coalition infringes on "their" turf. They may view it as a potential competitor for funds and media attention. Consider

approaching these people periodically with opportunities to be part of the coalition's programmes (perhaps as an expert speaker) or to sign on to advocacy efforts. As the coalition continues to engage them and acknowledge their expertise, they may come to see the value of collaborating more closely.

Hostility towards current partners: Some people are simply unwilling to work with other individuals or groups that are part of the coalition. This may be due to prejudices within society or institutions, or a result of interpersonal or inter-agency disagreements.

Overcoming Obstacles

If the concern involves personal or organizational dynamics, the individual could be invited to participate in the coalition through a working group in which the other individual or group does not participate.

If a community or organization will not participate because another coalition member works on separate issues that this community or organization opposes, discussions can be held to see whether the two groups would agree to co-operate in order to address the limited area where their interests overlap. It may take multiple conversations to arrive at such an agreement.

It may be that a community working on an issue that the coalition plans to address is prejudiced against another community represented in the coalition or holds strong beliefs that they view as incompatible with those of a coalition partner. In this case, there are a few options:

- 1) Attempt an open and productive dialogue about this issue. Communities and organizations are made up of individuals, and it may be possible to find someone with the desire and influence to bridge these divides. Once identified, the coalition can keep this individual informed of its activities and find ways to support them in opening up a dialogue within their community or organization.
- 2) If the objecting organization has an interest in supporting some coalition activities in spite of its unwillingness to co-operate with certain members, keep them informed of the coalition's plans and ways to get involved. Never exclude the other group from meetings or events to satisfy the objecting organization. The coalition's mission is to counter intolerance and discrimination, not to reinforce it.
- 3) Be prepared to acknowledge that some organizations conducting similar work

may not truly support the coalition's mission. These individuals or groups are simply not appropriate partners. In such cases, the coalition must go about its work and engage with these organizations in the same way it engages with other groups, communities or organizations that it seeks to educate and to inspire a more tolerant view.

Encourage participants to consider stakeholders from both the formal and informal sectors.

You can give the following definitions as guidance:

- **Formal sector:** The organizations, agencies and other established entities that make up a coalition. Formal sector entities usually have a budget, staff, a website and other useful resources.
- **Informal sector:** This includes groups and individuals who have good connections to the people most affected by the issue a coalition is addressing, but who may not have the same resources or staff capacity as those in the informal sector.

The First Meeting

TIME: 30 MINUTES

Setting the Right Tone

The first step is to identify a time and place where coalition members can come together in one place to discuss what the coalition should do and how it should function. It can often be difficult to find a time that suits everyone, so it is important to ensure that a diverse cross-section of the membership is represented at the meeting. Meeting organizers should be particularly mindful of making sure that the communities with the most at stake are well-represented. Online scheduling tools can be used to find a time that works for most coalition members.

The first meeting of a coalition is important in setting the right tone for a respectful, engaging and constructive gathering. To this end, the coalition's close partners can be involved to help plan the meeting. If participants feel unwelcome or if the meeting is poorly managed, hostile or boring, they may not come back.

Welcome newcomers as soon as they arrive and help promote friendly interac-

tions before the meeting begins. Provide refreshments. Bear in mind that food choices also send a message about how welcoming and inclusive the coalition is. It is a good idea to ask participants beforehand if they would prefer kosher, halal, vegetarian and/or vegan options. Avoid foods and beverages that could create divisions among the group.

Make sure that the meeting location is accessible and that appropriate arrangements are made so that participants caring for children, including breastfeeding mothers, and anyone with disabilities or language-related barriers can fully participate.

Circulate a sign-in sheet to record the contact information of everyone present. Make sure the meeting has a clear agenda (circulated in advance) and stick to it. Respect participants time and be sure that the meeting does not go on longer than announced.

Goals

- ▶ To discuss the importance of setting the right tone for a respectful, engaging and constructive gathering.

Running the Exercise

- 🔊 Once you've invited your stakeholders to join the coalition, it's time to plan your first meeting. This meeting is very important. Stakeholders may come to the meeting to see whether the coalition seems like a group that is worth their time. Setting the tone that the coalition will be effective, respectful and focused will increase the likelihood that people will continue to participate.
- 🔊 You begin setting that tone before the meeting even begins. What are some of the things we did before this workshop that made you feel more positive about participating?
- 👏 Write "Pre-Meeting" at the top of a flipchart and note the things people say. (Talk to them in advance about expectations, ask about accessibility, maternity and/or childcare needs, provide needed information, distribute agenda and other relevant materials, etc.)
- 🔊 What else could you do before your coalition meeting to make participants feel welcome and ready to collaborate? Now, looking specifically at the stakeholders on your list, what else could you do to make them feel like they wanted to be part of this coalition?
- 👏 Add these to the list.

Introductions

It is important to keep in mind that some participants may not know each other, some may work together frequently, while others may have had a bad experience during a previous attempt at collaboration. The participants cannot be expected to work together productively without first building trust and understanding within the group.

People who are meeting for the first time will often make assumptions about each other based on appearances. This can make some feel that they are being judged harshly or undervalued. Spending time at the beginning of the meeting to help build a sense of connection and get participants aligned around a common language and approach will pay off significantly in the long term.

Meetings often start with introductions and sometimes an “ice breaker” – a question or activity designed to get people talking and to get to know each other. It is a good idea to begin the coalition start-up meeting by going around the room and asking participants to introduce themselves (including information such as name, organization or affiliation, if any), but it is also important to give participants more time to really understand who is in the room and why they are there.

 How can you build trust and understanding among the participants?

 Add these to the flipchart list.

Initial Questions

At its initial meeting, the coalition will need to address a series of questions. It is important not to rush participants from one question to the next. Make sure that each participant has the chance to provide input and that their input is recorded (ideally on a flipchart or whiteboard for all participants to see). The goal of the meeting is not just to address questions, but to generate a sense of mutual understanding and connectedness so that participants feel positive about coming together to take collective action.

 It is important to ensure that the right questions are addressed at the start of the meeting. What questions should be addressed at the initial meeting?

 You might suggest:

- What community or issue does the coalition address? Who is it hoping to mobilize?
- What are the context, history and community climate of the issue?
- What are the root causes of the issue that the group has identified?
- What is currently being done to address the issue? Where are the gaps in current efforts?
- Why will building a coalition be a helpful approach to addressing the issue? What is it that coalition members can do together that they cannot accomplish separately?
- What values should inform the work of the coalition and how coalition members interact with each other?
- What is the coalition's purpose and vision? How will the coalition put its values into action to move towards its vision?
- What issues are important and closely related to the purpose?
- Who should be part of this effort? How will the coalition engage them?

 Add offered answers to the list.

Finishing Strong

It is a good idea to schedule time at the end of the meeting for a closing that will leave participants motivated to continue the coalition's work.

If possible, figure out when the next meeting will be, what that meeting will accomplish and what needs to be prepared in advance.

Ask each participant to list what they will do to follow up on the meeting. If they cannot think of anything, ask them who they can invite to the next meeting or prompt them to take on another unassigned task. Make sure that everyone leaves with a follow-up task to undertake before the next meeting.

Ask each participant to say one or two words describing how they feel about the coalition now. If the meeting went well, participants are likely to use words such as "energized" and "inspired". It is also likely that some participants will respond with "overwhelmed". If a participant voices a surprising or concerning response, it is a good idea to talk to them one-on-one after the meeting.

In closing, remember to thank everyone for coming and for contributing their thoughts and ideas to the coalition's efforts.

Follow-up

The day after the meeting, send an email to participants thanking them again for coming. Include information on any decisions made at the meeting and make a note of participants' follow-up commitments and the timeline. Remind them to put the next meeting on their calendars and ask for volunteers to help plan that meeting. This immediate reinforcement is extremely important in ensuring that coalition members continue to feel like they are a valued part of a well-managed effort.

It is also a good idea to call a few participants to ask how they think the meeting went, and for their advice on how the coalition should move forward.

It may be that not everyone who showed an interest in the coalition turned up at the first meeting. Get in touch with those people and ask if they would like to know what happened and the coalition's next steps. Ask if they would like to receive updates about future meetings. If they are supportive but have no time to participate, ask if they can send someone else from their community or organization, or reach out to someone who could bring a similar perspective.

When preparing for the next meeting, contact people who took on important tasks to see if they need any support in their roles. It is likely they will appreciate the reminder, and this communication can be used as an additional opportunity to see how members feel about the coalition before the next meeting.

🔊 What can you do after the meeting to make people want to be part of the coalition?

👋 Write down participants' responses.

🔊 You might suggest:

- Sending an email to participants thanking them again for coming;
- Providing information on any decisions made at the meeting;
- Making a note of participants' follow-up commitments and the timeline;
- Remind participants to put the next meeting on their calendar and help for volunteers to plan that meeting;
- Call participants to ask how they think the meeting went and ask for their advice on how the coalition should move forward; and
- Get in touch with people who couldn't attend and ask if they would like to know what happened and the coalition's next steps.

Day 1 Closing

TIME: 15 MINUTES

-  Briefly review what has been done and achieved during Day 1. Review the goals and agenda for the Day 2.
-  Based on Day 1, is there anything participants would want to change for Day 2? Review the start time for the next day and any logistical instructions (check out of your room before you come, etc.). If there is an evening activity, remind people where and when to gather.

Model Workshop Trainers' Manual: **Building Coalitions for Tolerance and Non-Discrimination**

Day 2

9:30 – 10:00	Day 2 Opening
10:00 – 10:15	Coalition Structure
10:15 – 11:15	Coalition Governance
11:15 – 11:30	Break
11:30 – 12:45	Coalition Planning
12:45 – 14:00	Lunch Break
14:00 – 15:00	Sustainability
15:00 – 16:00	Tracking & Evaluation
16:00 – 16:15	Break
16:15 – 16:30	The Life Cycle of a Coalition
16:30 – 17:00	Tools & Resources
17:00 – 17:30	Wrap-Up & Evaluation

Day 2 Opening

TIME: 30 MINUTES

Goals

- ▶ To welcome people back into the space.
- ▶ To provide a Day 1 recap.
- 🔊 Check with the participants if they have any reflections from the first day before proceeding with today's agenda. You can ask each person to say one thing from yesterday's workshop that they plan to do or that helped them think differently about some aspect of building their coalition.
- 👏 Ask for a volunteer to start things off, then move to the person next to them and continue around the room until everyone has responded.
- 🔊 Did anyone have any questions or other thoughts you'd like to share about what we covered yesterday?
- 🔊 Today we will discuss in more detail about how coalitions operate.

Coalition Structure

A coalition is a collaborative effort that requires both collective decision-making and power sharing. As such, the coalition's structure and leadership style should differ in form and function from that of a traditional hierarchical organization. In order to be effective, a coalition for tolerance needs an appropriate and explicit structure that reinforces these principles of collaboration.

It is important for coalitions to spend time discussing how they will make decisions and the best structure for accomplishing their work. Coalitions must be aware that the decisions they make can either reinforce or undermine the values that they are working towards.

Structure and Governance

The structure of a coalition is the framework around which it is organized. All groups have some structure, whether they consciously choose it or not. Coalition structures vary, and no one structure works best for all collaborations. The governance of a coalition refers to how decisions are made in the coalition, who is empowered to make those decisions and how leadership responsibilities are assigned and shared.

Putting it in Writing

The coalition should have a clear, written understanding of its structure and governance, even if this amounts to just a one-page description or list of coalition operating principles. Once established, a coalition's structure and governance will evolve over time and may look quite different within a few years. This is to be expected, since coalitions are living dynamic systems and need to modify as they grow and adapt to changing situations. The structure and governance plan will allow the coalition to realize its goals. Core elements of a successful coalition's structure and governance include: (1) clear communication; (2) principles for shared decision-making; (3) roles and responsibilities; and (4) the capacity to act.

Coalition Structure

TIME: 15 MINUTES

Collective decision-making

All coalition members should have some input in decisions about the coalition's structure. Shared decision-making is a key principle for successful coalitions and needs to be a part of this process as well. At the same time, the coalition should not get so immersed in the process of creating a structure that the project takes up significant time that could be used in moving towards their agenda.

-  Coalitions differ from organizations in that they rely on shared leadership from multiple partners. The more ownership members feel over the coalition, the more work and resources they will be willing to contribute to its success. There is not one correct structure for coalition governance, but whatever structure you choose needs to reflect and reinforce the values of shared leadership and participation.
-  Draw a common coalition structure on the flipchart. At the top of the flipchart, write "Coalition" and put a circle around it.
-  Your typical organizational chart will likely have either a board of directors or an Executive Director at the top. Coalitions are different in that the "Coalition as a whole" is typically the highest decision-making body.
-  Draw four circles about two-thirds of the way down the flipchart paper with "Working Group" inside.
-  Most coalitions create working groups that are tasked with advancing the coalition's work related to a specific goal or programme.

-  Draw a circle directly below the coalition circle and write “Steering Committee” inside.
-  Most coalitions also have a steering committee (also called an executive committee) made up of individuals in key leadership positions (coalition leaders, working group chairs, etc.). This group is often tasked with developing the agenda for coalition meetings and making sure that the various pieces of the coalition’s work move forward in a co-ordinated way.
-  Some coalitions also have coalition staff, such as a Coalition Co-ordinator or Administrative Director. This individual typically reports to the Steering Committee.
-  Discuss with the participants if they have seen other coalition structures.
-  Check if they have any questions about coalition structures or thoughts they would like to share.

Coalition Governance

TIME: 60 MINUTES

-  The participants should continue working in groups. Distribute the “Operating Principles Template” found in Annex 6.
-  For the purposes of this exercise, imagine that you are starting a coalition with the people at your table. You’ve agreed on your coalition’s mission and vision and some basic ground rules for how you will work together. Now you need greater clarity about how the coalition will move its work forward. That means it is time to develop operating principles. Fill in the template based on what your group agrees will work best to move towards the vision we defined on Day 1.
-  Go from group to group to see if there are questions and make sure everyone is on track. Notice if people are having any interesting discussions that you would like them to tell the group about later.
-  Ask the groups to report back. Ask questions about what values or discussion led to a particular decision. Highlight areas where groups came to different conclusions and ask them to discuss.

Roles and Responsibilities

Coalition members should have clear roles and responsibilities. They all share the responsibilities of attending coalition meetings, keeping the organization they

represent well informed as to what is happening in the coalition or issues that affect its work, volunteering to join a working group and so on. Such activities represent ways in which the members agree to be accountable to the coalition. In some coalitions, new members are asked to sign an agreement outlining their responsibilities before joining and commit to these responsibilities for continued membership. The purpose of establishing roles is to encourage each coalition member to take on some responsibility and to avoid situations whereby members only attend meetings as passive participants or do not participate at all. Other roles and responsibilities can be added as the coalition's structure is developed. The coalition should also determine the procedure for adding new members and renewing continued membership.

It is important that the coalition establishes how decisions will be made, as well as which decisions will be made by which people, committees or working groups. Regardless of the method adopted, the decision-making guidelines must be clear and written down.

Once the coalition has determined how decisions will be made, it must then determine who can take those decisions. It can be valuable to spend some time discussing the different kinds of decisions that the coalition is likely to encounter, and determining where in the coalition's structure those decisions belong. The most important decisions, such as those relating to coalition strategy and identity, should be made by the coalition as a whole. This helps to ensure that all coalition members feel that they have an equal voice in the coalition's direction, allows for discussions about areas of disagreement, and reduces the likelihood that decisions will need to be revisited at a later date.

Developing Strategies for External Communications

Developing a communications strategy can help a coalition advance its goals. While the details of such a strategy are beyond the scope of this publication, the following are a few basic considerations (1) make sure the coalition has clear guidelines on who can issue communications and speak to the media on behalf of the coalition, as well as the procedure for approving these communications; (2) set up a website for the coalition, if possible. At a minimum, establish a presence on social media (such as Facebook and Twitter, or whichever platform is widely used in areas where the coalition works); (3) work with coalition partners to build a list of media contacts that includes reporters and bloggers who regularly write about issues that the coalition addresses, as well as relevant publications and websites. Develop a system (or identify a partner with access to a system) to

distribute press releases and other communications to those on the list. When issuing a press release, be sure to also share it on social media; (4) localized campaigns may also benefit from more direct communications, such as posters, flyers, mail or phone calls. Another idea is to set up an informational table in a local marketplace or at a widely attended community event; and (5) consider starting a mailing list or newsletter to keep other like-minded organizations informed about the coalition's activities. When a potential partner declines to join the coalition, they can instead be invited to join the mailing list so that they can follow the coalition's work.

Break

TIME: 15 MINUTES

Coalition Planning

TIME: 75 MINUTES

- 🔊 Why is planning important for a coalition?
- 👉 Write responses on the flipchart. You might suggest:
 - Builds alignment among coalition partners.
 - Allows everyone see how resources will be used.
 - Gives us a roadmap for our actions.
 - Gives us clear goals to strive for.
- 🔊 How many of you have been part of some sort of strategic planning? Would anybody like to describe the process you used? Was it a useful experience? What challenges did you encounter?
- 🔊 There are many different models to develop a plan. Most of them wind up with something like the “Coalition Plan Template” found in Annex 7. Typically, in a planning meeting, coalition members will define big picture goals and desired outcomes, as well as more specific objectives that show progress towards the goals. They may also begin to identify some strategies or actions that will help the coalition achieve its objectives. At that stage, it is common for coalitions to create a working group associated with each goal (or major area of activity) and task that working group with coming up with more detailed actions, individual assignments and a timeline for completing them. Those working group plans are then discussed, adjusted and approved by the coalition as a whole.

If you and your coalition partners are familiar with an alternative planning model, go ahead and use that. The Guide describes a traditional planning process and also offers an alternative, called the Passport to the Future.²

-  Distribute handout “Passport to the Future” found in Annex 8 to the groups and ask them to discuss and complete the handout *as if they were starting a coalition* (but without the level of detail that would go into a real coalition discussion).
-  Go from group to group to see if there are questions and make sure everyone is on track. Notice if people are having any interesting discussions that you would like them to tell the group about later. Ask the groups to report back about their experience using this planning tool. (Do not ask them to read through the entire worksheet.) Ask if any of the questions led to particularly interesting discussions that they’d like to share. Do they feel like this tool would lead them to the point where the coalition could arrive at a shared plan? Encourage groups to ask each other questions or discuss differences in their choices.

The Purpose of Coalition Planning

The ultimate goal of a coalition is to bring about changes to programmes, policies and practices in order to promote the coalition’s goals (moving beyond mere dialogue). For example, coalitions may come together to promote the adoption of anti-discrimination training programmes in the workplace, pass policies that criminalize hate crimes or change the way that law enforcement officials track reports of bias-motivated crimes. The best way to accomplish these goals is through thoughtful and collective planning. This exercise reviews the elements of a plan and offers a variety of approaches for coalitions to facilitate better planning.

Lunch break

TIME: 75 MINUTES

Sustainability

TIME: 60 MINUTES

-  The Guide provides advice on planning for the sustainability of your coalition and on dealing with some of the most common challenges that coalitions face. Let’s spend some time this afternoon discussing some of the challenges that you may face.

² The Passport to the Future planning model has been adapted from material developed by the Self Help Network at Wichita State University.

-  There are four general strategies to approaching sustainability that the coalition may consider: *policy change*, *institutionalization*, *community ownership* and *finding resources*. Note that these approaches are not mutually exclusive. The coalition should discuss what combination of these approaches is best suited to the goals it seeks to accomplish.
-  Assign one “Sustainability Policy Strategy” handout found in Annex 9 to each group. Give the groups ten minutes to discuss their assigned strategies. After ten minutes ask each group to present their respective strategies. If there are fewer than four groups, the trainer should present the remaining strategies. If there are more than four groups then merge the groups so that there are four.
-  What are the major benefits to this strategy for sustainability? Do you foresee any problems in using this strategy? Can this strategy be used alone, or would it be more effective if paired with other strategies?
-  Facilitate the discussion with the group as a whole with the purpose of familiarizing the participants with all of the strategies and understanding how they may interact with each other in practice.
-  What are some other challenges or sustainability issues that you might encounter?
-  Write responses on the flipchart. Identify a few responses that seem the most common or relevant to discuss, and ask the group if they agree to focus on these issues. Facilitate the discussion with the group as a whole with the purpose of getting them to think through solutions to problems that are likely to arise in their coalition building efforts.

Challenge #1: Dealing with Conflict

Conflict is a normal and even healthy part of any coalition’s development. It can be stressful for all involved, but sometimes that stress can be reduced simply by acknowledging that conflicts are to be expected and by proactively discussing issues with the group. In the long-term, facing conflicts directly can lead to greater understanding among coalition members and to changes that are beneficial to the coalition’s work.

Challenge #2: Member Recruitment and Retention

The importance of ongoing recruitment in developing a coalition has already been mentioned. In addition, it is critical to think about how the coalition will retain its current membership. People first join a coalition because they support its purpose.

They stay involved because they think it is a good use of their time and because they develop a feeling of commitment to their fellow coalition members. If the coalition is not making progress towards its goals, if personal relationships are not forged or if people find that meetings are tense, boring or not an efficient use of their time, then they will eventually become inactive or leave.

Be intentional about building a sense of camaraderie among group members. Make sure members have an opportunity to get to know each other better, both during meetings and in a more social setting. Find opportunities to celebrate with the group and to recognize the milestones and accomplishments of individual members. Make a plan for re-engaging inactive members or members who may not be used effectively.

Challenge #3: Leadership Development

Another important element in sustaining coalitions involves continually developing leadership within the group. A focus on leadership development protects against burn-out by spreading responsibilities and ensures that the coalition will not fall apart when one member or staff person leaves. It also enables the rotation of leadership roles within the coalition, thus promoting the view of equality and avoiding dominance by any one member or group.

Tracking & Evaluation

TIME: 60 MINUTES

- ▶▶ The most effective coalitions continually assess their progress, look for lessons they can learn from past experience, adjust their plans to reflect current progress and seek ways to function more effectively.
- ▶▶ Tracking your coalition's activities is one key way to make sure you stay on track. You can see if there are areas where you need to increase your focus in order to achieve your objectives or if there are some activities that don't seem to be gaining any momentum. Tracking can also be a valuable tool for accountability – so that coalition members can see the progress the group is making and so that you can report to funders and potential funders on your progress. You may track things like the number of events you hold, the number of media mentions you generate, the number of people who participate in your trainings, etc. To be able to better assess its long-term impact, a coalition may keep track of changes in programmes, policies and practices, such as relevant changes in

legislation or improved practices of government institutions. Tracking these elements can demonstrate progress towards longer-term goals, such as creating a safer and more tolerant society and reducing discrimination.

Keep in mind that the numbers alone don't tell you much if you don't have a target that you're striving for. Having a concrete target also tells you whether the person or people responsible for this particular activity are delivering the work they have been entrusted to do. If not, you will hopefully see this before the end of the year and make any needed adjustments.

-  Suggest that the participants spend some time going through the plans they developed earlier in the day to see what elements they would want to track. Ask them, for each of the activities listed in their plan, to write down at least one thing they would track, as well as a target for each.
-  Give the groups time to work through their plans, then return to the full group.
-  Ask if anyone would like to share something that they will be tracking and their target.
-  Go through a few examples with the group. Write responses on the flipchart. Ask them what this information would tell them. How might they adjust their plan based on the information the tracking is showing them? What other indicators could be tracked to give you a clear picture of progress on this front?
-  Typically, at the end of each planning year, you will want to do a more detailed evaluation of the coalition's progress and its overall health to inform your plans for the coming year. In addition to the items that were already discussed, how else is it possible to evaluate the coalition's health and the impact of its work?
-  Take ideas from the group. If needed, ask the group: How can we evaluate whether we have the right people at the table? Whether we're working well together? Refer the group to the "Tracking and Evaluation" chapter in the Guide for further ideas.
-  Annex 10 has a "Coalition Member Assessment" tool. Asking members to respond to this survey at the end of each year of the coalition's work can be extremely helpful in figuring out how members feel about the coalition and ways it could improve. These responses can inform useful conversations about any needed changes in how the coalition works or how coalition members interact. Tracking member responses to these questions over a period of years can show trends in how the coalition has evolved over time.

Break

TIME: 15 MINUTES

The Life Cycle of a Coalition

TIME: 15 MINUTES

-  In this workshop, we've talked about coalitions as if they follow a linear development process. In fact, many of these activities happen simultaneously, and much of the work you do will occur in cycles.

Let's think back to the discussion we had yesterday about who should be part of your coalition. As you move forward with your work, you may discover that you need people at the table with skills or experience that you hadn't considered before. You may lose some members (or ask them to leave) and recruit others. You should regularly review your stakeholder analysis and see whether there are other groups you should approach (or re-approach) about joining the coalition.

In addition, your coalition should come together at least once a year to review the progress it's made towards its goals, discuss and learn from previous activities, and make any course adjustments needed to be as effective as possible.

Finally, keep in mind that a coalition is a group that comes together to work towards a common purpose. That purpose should be the guiding light for your coalition's work. Always ask, "Is there a better way of achieving this purpose?" and "Has the coalition accomplished its purpose?" If the answer to either of these questions is Yes, the coalition needs to discuss whether it is time to dissolve or change focus. Coalitions are not intended to be permanent entities; when they have fulfilled their mission or outlived their usefulness, it is time to end them. Coalition members may find a desire to build on the relationships established in the coalition by continuing to collaborate on other projects moving forward and this should also be viewed as a sign of success.

Any questions or comments from your own experience?

Tools & Resources

TIME: 30 MINUTES

-  For this part of the training you will need a computer, projector and screen. You may want to prepare a presentation or have the websites open in advance. In the absence of relevant equipment, handouts can be found in the annexes.
-  Let's spend some time reviewing the Guide and other resources available to help you get your coalition started. Ask if anyone spent some time looking through the Guide. See if anyone had any questions that were not answered during the workshop.

Highlight some of the tools and activities that were not discussed in this workshop:

Annex 11 has a “Sample Agenda for a Coalition Start-up Meeting”. Many of the activities will look familiar from this workshop.

Annex 12 has one example of how to facilitate a consensus decision-making process. Most coalitions make decisions using some form of consensus, because it reinforces the coalition’s shared leadership and ensures that minority concerns aren’t swept aside by the majority.

As your coalition gets up and running, you will of course encounter some challenges. Annex 13 has a helpful tool to help you understand the cause of the challenges you are experiencing and suggestions for how to address them.

If you have access to the internet demonstrate the websites referenced in the Resources section (below) to the participants. This will show some of the other tools and support available as the coalition moves forward.

 Visit the websites cited below and discuss what they have to offer. Click on a few links within each site to demonstrate relevant tools.

First, note that [ODIHR offers many reports and resources](#) related to addressing intolerance and discrimination on its website.³ Other resources include:

[The Community Tool Box](#): Content on starting a coalition;⁴

[Coalitions Work](#): Resources and tools for coalitions;⁵ and

[Seeds for Change](#): Resources on consensus building, facilitation, and skills for working in groups.⁶

 Explain that there are more suggested websites mentioned in the Guide. Remind the participants that everyone in the room is a potential resource too. They can learn from each other’s experiences, share materials and provide moral support. Ask for permission to send around a contact list of meeting participants. Encourage them to keep each other informed about their activities and reach out when they have questions or challenges.

 Does anyone have any other resources they’d like to share?

 Does anyone have any final questions before we wrap up?

³ <https://www.osce.org/odihr/tolerance-and-non-discrimination>

⁴ <https://ctb.ku.edu/en/table-of-contents/assessment/promotion-strategies/start-a-coalition/main>

⁵ <http://coalitionswork.com/resources/tools/>

⁶ <https://www.seedsforchange.org.uk/resources>

Wrap-Up & Evaluation

TIME: 15 MINUTES

Goals

- ▶ To close the workshop.
- ▶ To get some feedback for next time.
-  Use this session to gather initial informal feedback and give an opportunity for the participants to reflect on what they have learned. Distribute the survey found in Annex 14 for more substantial, concrete comments. Kindly ask the participants to fill out the survey so that their feedback can be incorporated into future trainings. If electronic feedback is not practical, distribute a paper version and collect it as participants leave the training.
-  Draw a T-shaped chart with plus and minus symbols as headers of the two columns. Ask the group to give feedback on the workshop, listing positive aspects (what they found most useful) and parts that they would change or improve.
-  Have each person say something to close out the workshop. You could have each person say one word that describes how they are feeling about coalition building, or say what they most got out of the workshop. Closing by having everyone say something makes participants feel valued, and gives a clean breaking point for the day.
-  Thank the participants for coming and wish them every success!

Model Workshop Trainers' Manual: **Building Coalitions for Tolerance and Non-Discrimination**

Annexes

<i>Annex 1</i>	Sample Pre-Training Evaluation Form for the Coalition Building Workshop
<i>Annex 2</i>	Visioning Exercise: Challenges and Solutions When Building a Coalition Scenario
<i>Annex 3</i>	Stakeholder Identification Process Flowchart
<i>Annex 4</i>	Stakeholder Analysis Roleplaying Exercise
<i>Annex 5</i>	Stakeholder Analysis Worksheet
<i>Annex 6</i>	Operating Principles Template
<i>Annex 7</i>	Developing a Coalition Plan Template
<i>Annex 8</i>	Passport to the Future
<i>Annex 9</i>	Sustainability Policy Strategies
<i>Annex 10</i>	Coalition Member Assessment Tool
<i>Annex 11</i>	First Meeting Sample Agenda
<i>Annex 12</i>	The Stages of the Consensus Process
<i>Annex 13</i>	What to Do When Things Go Wrong
<i>Annex 14</i>	Sample Post-Training Evaluation Form for the Training Session

Annex 1

Sample Pre-Training Evaluation Form for the Coalition Building Workshop

First name: _____

Family name: _____

Organization: _____

Country of origin: _____

Email address: _____

Telephone number: _____

Gender

female male other/prefer not to say

Dietary restrictions

Vegetarian Kosher Halal Other: _____

Will you require nursing/childcare facilities?

Yes No

If yes, please describe the facilities you require:

Do you have any specific mobility needs?

Yes No

If yes, please describe the assistance you require:

May we share your contact information with other workshop participants?

Yes No

Do you consent to photos of the workshop being taken?

Yes No

Please describe your work. What population(s) do you mostly focus on?

What experience do you have working in or starting coalitions?

Are you currently involved with or considering starting a coalition? If so, what do you see as the aim of the coalition? What steps have you already undertaken? What challenges are you facing?

What is your objective for participating in the workshop?

Do you have any specific questions about coalitions you would like answered?

Do you have any questions about the training that ODIHR may be able to answer?

Annex 2

Visioning Exercise: Challenges and Solutions When Building a Coalition Scenario

* The following organizations are fictitious.

Example: The Teaching Alliance works to promote human rights, tolerance and diversity through education about the Holocaust and anti-Semitism through media literacy. The network has developed teaching materials and methodologies to empower educators, librarians, archivists and others to take an active role as educational multipliers and effectively promote and share information that leads to changes in attitudes and behaviour.

Example: The Eurasian Council of Interfaith Women has worked with the Media Diversity Institute and several other civil society organizations on the “Get the Bullies Out!” project to encourage young people to combat discrimination and religious intolerance on social media. The current phase of the project includes monitoring and responding to diverse forms of hate speech, including anti-Muslim and anti-Christian sentiments, and attempts to turn public opinion against migrants and asylum-seekers.

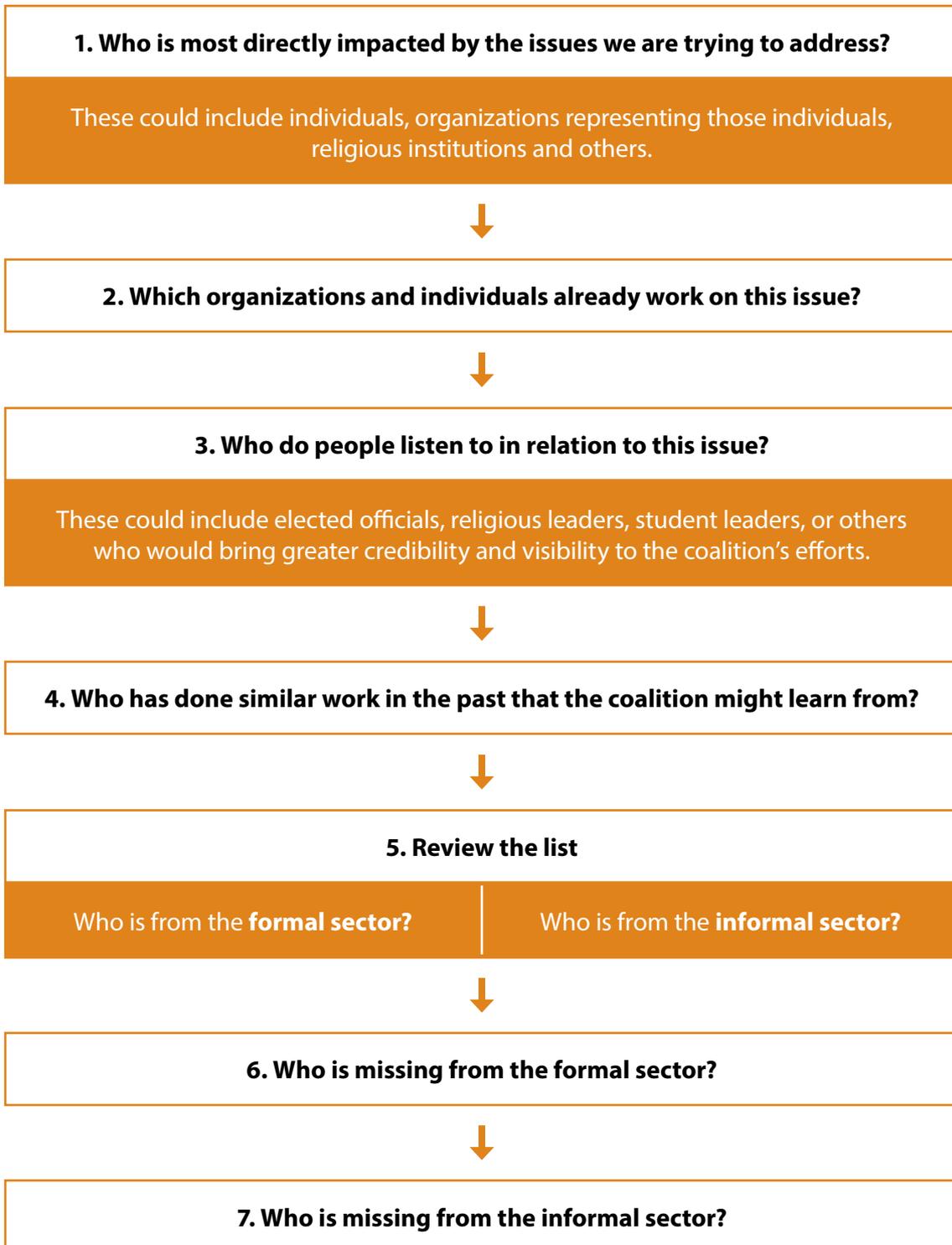
Example: A large group of the most active members of an interfaith coalition throughout Central Asia formed a non-profit organization called Learning through Solidarity. The organization provides integration workshops for recently arrived refugees and operates a community centre that brings together long-time residents and new arrivals to build understanding, increase economic opportunities and address prejudice.

Example: The Baltic Council Against Xenophobia hosts webinars and massive open online courses that feature tools on organizing to combat racism and examples of ways that groups from around the world have come together to achieve political change.

Example: The Central European Hate Crime Recording Network is made up of 22 civil society groups, with various European Ombudspersons as observers. The network was formed to help fill gaps in official data collection systems and to address the need to better co-ordinate civil society’s efforts in recording hate crimes. The coalition publishes an annual report on hate crime incidents in several European countries.

Annex 3

Stakeholder Identification Process Flowchart



Annex 4

Stakeholder Analysis Roleplaying Exercise

Team 1

Volunteer 1: Coalition Member 1, you are a member of The Coalition Against Xenophobia which has the broad goal of countering anti-Semitism, nationalist hatred, religious intolerance and xenophobia. Your coalition is the only existing platform of co-operating non-governmental organizations and activists formed specifically to discuss the problems of xenophobia and religious intolerance in your country. You are meeting with Stakeholder 1, a well-known social activist who writes a weekly blog on tolerance and non-discrimination. Your goal is to convince Stakeholder 1 to join your coalition. Please introduce yourself to Stakeholder 1, briefly explain the goals of your coalition, and attempt to convince him/her to join.

Volunteer 2: Stakeholder 1, you have become known to the public through your weekly blog in which you address issues of tolerance and non-discrimination. For quite some time you have been aware of the work of The Coalition Against Xenophobia, and are interested in joining the coalition. You are meeting with Coalition Member 1 who you know is going to try to convince you to join this coalition. Please ask him/her to describe the coalition and how you may contribute to its work. After realizing that joining the coalition will be mutually beneficial, consent to joining.

Team 2

Volunteer 3: Coalition Member 2, you are a member of The Coalition Against Xenophobia which has the broad goal of countering anti-Semitism, nationalist hatred, religious intolerance and xenophobia. Your coalition is the only existing platform of co-operating non-governmental organizations and activists formed specifically to discuss the problems of xenophobia and religious intolerance in your country. You are meeting with Stakeholder 2, the leader of a civil society organization who works to promote tolerance and non-discrimination. Your goal is to convince Stakeholder 2 to join your coalition. Please introduce yourself to Stakeholder 2, briefly explain the goals of your coalition, and attempt to convince him/her to join.

Volunteer 4: Stakeholder 2, you work tirelessly to run a civil society organization focused on promoting tolerance and non-discrimination. You're meeting with Coalition Member 2 who is a member of The Coalition Against Xenophobia. You're aware of The Coalition Against Xenophobia, and take offense to their claims that they are the only existing platform of co-operating civil society organizations and activists formed specifically to discuss the problems of xenophobia and religious intolerance in your country. You're aware that Coalition Member 2 is going to invite you join the coalition. Hear him/her out, and think about whether or not your efforts would be best spent working with the coalition. Don't make a decision now.

Team 3

Volunteer 5: Coalition Member 3, you are a member of The Coalition Against Xenophobia which has the broad goal of countering anti-Semitism, nationalist hatred, religious intolerance and xenophobia. Your coalition has an "all inclusive" approach to engaging partners, and as a matter of policy you don't deny organizations interested in joining your coalition in doing so. As a result, you have unlikely coalition members who don't see eye-to-eye on many issues. You believe this plurality of perspectives contributes to the work of your coalition. You're meeting with Stakeholder 3, the founder of a civil society organization known for his/her controversial views and abrasive relationship with other non-profits in the area. You feel he/she would be a perfect coalition partner. However, you're worried that he/she may take issue with two of your most active members: Controversial Member 1 and Controversial Member 2. If he/she inquires about their membership, explain to him/her why contrasting views can be positive in a coalition.

Volunteer 6: Stakeholder 3, you are the founder of a civil society organization, well-known for your unwavering views and dedication to your cause. You're meeting with Coalition Member 3, a member of The Coalition Against Xenophobia which has the broad goal of countering anti-Semitism, nationalist hatred, religious intolerance and xenophobia. You're aware that two organizations you have no interest partnering with, Controversial Member 1 and Controversial Member 2, are members of The Coalition Against Xenophobia. Allow him/her to make his/her pitch, but ultimately refuse to join the coalition, offering your opinion that collaboration with Controversial Member 1 and Controversial Member 2 would not be productive.

Annex 5

Stakeholder Analysis Worksheet

TOOLS FOR CHAPTER 2 OF THE GUIDE: BUILDING A COALITION

Stakeholder definition: “Stakeholders” are those who have a stake in the outcome of the coalition’s work. This will include those who are directly impacted by the issues that the coalition seeks to address, individuals and organizations that are currently involved with efforts to address these issues, opinion leaders (people who shape others’ understanding of an issue), and those whose lives or work may be affected by the coalition’s efforts. When developing a recruitment plan, focus on identifying stakeholders whose interests align with those of the coalition.

To perform a stakeholder analysis, list the stakeholders at the top of each column and answer the questions contained in each row of the first column.

Stakeholder analysis questions	Stakeholders		
	Stakeholder 1	Stakeholder 2	Stakeholder 3
<p>What skills, capacities, and or/resources would the stakeholder bring to the coalition?</p> <p><i>Knowing this can help the coalition identify those stakeholders with the most to offer.</i></p>			
<p>What is their potential role within the coalition?</p> <p><i>This allows the coalition to define what stakeholders might contribute to the group’s efforts.</i></p>			

Stakeholder analysis questions	Stakeholders		
	Stakeholder 1	Stakeholder 2	Stakeholder 3
<p>What is their self-interest? Why would they join?</p> <p><i>Consider why they would benefit from being a member of the coalition, and use that information to encourage them to join.</i></p>			
How will you recruit them?			
What barriers might exist to recruiting them?			
<p>Who will approach them and when?</p> <p><i>In addressing the question of when, prioritize those who have the most to offer the coalition and those with the greatest self-interest in the coalition's work.</i></p>			

Annex 6

Operating Principles Template

TOOLS FOR CHAPTER 4 OF THE GUIDE: STRUCTURE, GOVERNANCE AND LEADERSHIP

Template for establishing a coalition's operating principles

I. MISSION: An effective mission statement contains a compelling description of the coalition's purpose and the strategies it will employ to accomplish it.*

II. NAME: What name should the coalition adopt to clearly communicate what it is trying to do?

The coalition's name is the _____

III. STATUS AND LIMITATIONS: What is the coalition's structure and intent?

Example: In order to achieve its mission, this entity is organized as a voluntary coalition.

Members of the coalition will uphold the mission and abide by its operating principles.

IV. MEMBERSHIP: Who is eligible to be a member of the coalition? What groups should be involved in order to successfully achieve its mission?

Example: The coalition is led by its members. Members can include public, private and not-for-profit groups, and citizens, volunteers and educators. Membership is open to any organization and/or individual who subscribes and commits to the coalition's mission. Interested parties will be discussed, reviewed and approved by existing members.

Each member is permitted to have up to two representatives serving on the coalition.

* See, for example, Francis Pandolfi, "How to Create an Effective Non-Profit Mission Statement", Harvard Business Review, March 14, 2011, <https://hbr.org/2011/03/how-nonprofit-misuse-their-mis>.

V. ROLES AND RESPONSIBILITIES: What is expected of coalition members?

Example: Members are expected to: _____

- Regularly attend meetings, or send an appropriate delegate (no more than two representatives), and participate in working groups;
- Actively collaborate on and help execute a strategic plan that includes strategy, key messages, measures of success and tactics;
- Receive and acknowledge all communications;
- Make decisions as a group;
- Serve as a spokesperson of the coalition when appropriate;
- Utilize, if appropriate, their separate organizational channels to help promote the mission of the coalition and to disseminate relevant information and tools; and
- Allow their organization's name and logo to be referenced in coalition materials, if approved by the necessary parties of their organization.

VI. DECISION-MAKING PROCESS: How will the coalition make decisions?

Example: Whenever possible, decisions will be made by consensus, in order to encourage the opinions of everyone to be heard and discussed. The majority decision will be followed, provided there is no major objection.

VII. ADMINISTRATION: How will the coalition stay organized and on-track? Who will organize and manage meetings, record minutes, etc.?

Example: The activities of the coalition will be administered by

Coalition working groups will meet monthly, or as needed, either through videoconference or teleconference. The coalition as a whole will meet in-person quarterly. An administrative team member will participate in every meeting to facilitate, record minutes and co-ordinate next steps and future plans.

VIII. COALITION FUNDING: How will the coalition's activities be funded? What are coalition members expected to contribute? Could coalition members be possible beneficiaries of coalition funds?

IX. EXTERNAL COMMUNICATIONS: What guidelines or review process should be established to ensure that external communications related to the coalition are consistent and approved by all members?

Example: Any communication referencing the coalition, its membership or its work, must be reviewed and approved collectively by all members.

Annex 7

Developing a Coalition Plan Template

TOOLS FOR CHAPTER 5 OF THE GUIDE: DEVELOPING A COALITION PLAN

Sample coalition plan template

See Chapter 5 of the Guide for more details on how to use this worksheet. A coalition plan contains the following elements:

Goals: Goals translate the coalition’s mission and vision into concrete directions, defining what it will achieve by the end of the planning period. Goals represent the broader purpose of the coalition and, as such, should be developed to reflect each of its key functions.

Objectives: Objectives are the major accomplishments that the coalition seeks to achieve over time. Objectives differ from goals in that they are specific and measurable; they are the intermediary achievements that the coalition sets in order to realize its goals.

Strategies/Tactics: Strategies are the specific tasks the coalition will perform in order to achieve its objectives. Make sure that the coalition’s strategies are specific and lead logically to its objectives.

Plan for <Coalition Name> _____

<Dates of the Plan> _____

Adopted on <date> _____

The following coalition members participated in the development of this plan:

Coalition Purpose: _____

Goal 1:	Objective 1:
	Objective 2:
	Objective 3:
	Strategy 1: Who will implement the strategy, by when?
	Strategy 2: Who will implement the strategy, by when?
	Strategy 3: Who will implement the strategy, by when?
Goal 2:	Objective 1:
	Objective 2:
	Objective 3:
	Strategy 1: Who will implement the strategy, by when?
	Strategy 2: Who will implement the strategy, by when?
	Strategy 3: Who will implement the strategy, by when?
Goal 3:	Objective 1:
	Objective 2:
	Objective 3:
	Strategy 1: Who will implement the strategy, by when?
	Strategy 2: Who will implement the strategy, by when?
	Strategy 3: Who will implement the strategy, by when?

Annex 8

Passport to the Future

Passport to the future (Tearless Logic Model)*

- I. What is the purpose of the coalition?
- II. What needs is it addressing? How does it know what the needs are?
- III. What are its goals and the anticipated outcomes of its work?
 - a. What is the ultimate goal, or what would the coalition like to have achieved by a defined date?
 - b. What immediate and intermediate changes does the coalition expect to bring about?
 - c. What resources does the coalition need to achieve its goals?
- IV. How will the coalition realize its aims?
 - a. What is the coalition's current plan?
 - b. What are its current and planned activities?
 - c. How will its activities lead to its goals and expected outcomes?
- V. How will the coalition evaluate its progress? What benchmarks will it apply?
 - a. How will the coalition know when it has reached its goal? What will it look like?
 - b. What will happen when the coalition reaches its goal?

* The Passport to the Future planning model has been adapted from material developed by the Self Help Network at Wichita State University.

Annex 9

Sustainability Policy Strategies*

1. Policy change

Bringing about changes to the legal framework is one of the main reasons to form a coalition and is an effective way for a coalition to sustain the impact of its work. Through advocacy and social change mechanisms, programmes can continue to have an impact long after the coalition has ended. When policy change is the sustainability strategy, the coalition works to **advocate for policy change** and to **train the community and its constituents** to become effective advocates for policy change.

Coalitions can target either large-scale government policies at the national, regional or district levels, or more localized policies (for example, school policies on how hate crime incidents are handled or agreements between local police departments and human rights monitoring groups). One example of a long-term policy change that a coalition can bring about through its advocacy initiatives is the passage of comprehensive hate crime legislation that includes the proper identification, recording and reporting by police and other authorities of bias-motivated incidents.

2. Institutionalization

Institutionalization involves developing tolerance and non-discrimination programmes that are then adopted and owned by other institutions or associations. In line with this approach, the coalition may plan and support programmes that can ultimately be incorporated into existing institutions, including schools, community centres or other organizations and agencies. Alternatively, the coalition may develop resources, for example on conducting interfaith dialogues, and then share these resources with government agencies working to address intolerance and discrimination.

What are the long-term implications for the coalition in sharing its programmes? For example, does the programme provide a significant portion of the coalition's income? Are there coalition members who would likely lose interest in the coalition without this programme? Is the programme closely tied to the coalition's reputation and public image?

* This annex is adapted from: Tom Wolff "Tools for Sustainability", Global Journal for Community Psychology Practice, Vol. 1, No. 1, 2010, p. 40-57.

3. Building community ownership

In this third approach to sustainability, communities claim ownership for the coalition's activities. When the coalition's work is part of a broader development and empowerment strategy, then its goal is to mobilize community members who will continue these efforts. In this scenario, groups that are not part of the coalition can still take responsibility for organizing local responses to acts of intolerance or hate, for example.

Another variation of this strategy is to change prevailing norms. For example, an effective social marketing campaign can influence the attitudes and behaviours of broad segments of society in the long term.

4. Finding resources to sustain the effort

One benefit of coalitions is that they allow organizations with limited resources to band together, creating a whole that is often greater than the sum of its parts. Nonetheless, most coalitions require some financing to operate sustainably and to implement joint programmes. In general, members need to discuss and agree on strategies to fund the coalition's activities. Initially, the coalition may be able to rely only on time and other resources contributed by coalition partners. However, as the coalition grows and its work becomes more complex, it may require independent funding sources. Some coalitions receive funding from foundations or government agencies, some collect dues (or in-kind resources) from members and others receive fees for services performed. Coalition members will likely have experience in funding their own organizations and will have ideas about ways to increase the coalition's financial capacity without competing with member organizations for those funds.

Finding additional resources to support coalition efforts is the most common approach to sustainability and may be combined with any of the other sustainability strategies.

Annex 10

Coalition Member Assessment Tool*

TOOLS FOR CHAPTER 7 OF THE GUIDE: TRACKING AND EVALUATION

Ask coalition members to complete the following member assessment tool in order to determine the health of the coalition. Ideally, coalition member assessments should be conducted at least once a year.

For each item, please circle the number that best reflects the degree to which you agree with the statement about that aspect of the coalition.

	Strongly agree					Strongly disagree				
Vision: Planning, Implementation and Progress										
1.	1	2	3	4	5					
2.	1	2	3	4	5					
3.	1	2	3	4	5					
4.	1	2	3	4	5					
5.	1	2	3	4	5					
6.	1	2	3	4	5					
7.	1	2	3	4	5					
Leadership and Membership										
8.	1	2	3	4	5					
9.	1	2	3	4	5					
10.	1	2	3	4	5					

* Adapted from Tom Wolff, *The Power of Collaborative Solutions: six principles and effective tools for building healthy communities* (San Francisco: Jossey-Bass, A Wiley Imprint, 2010), p. 251-257.

	Strongly agree					Strongly disagree				
11. Administrative responsibilities are shared equitably among men and women, and across all groups in the coalition.	1	2	3	4	5	1	2	3	4	5
12. The coalition creates greater ownership by engaging partners in joint ventures and projects.	1	2	3	4	5	1	2	3	4	5
13. The coalition has a broad membership that is appropriate to the issue it is addressing.	1	2	3	4	5	1	2	3	4	5
14. The coalition's membership is diverse.	1	2	3	4	5	1	2	3	4	5
15. Members display commitment and take on tasks.	1	2	3	4	5	1	2	3	4	5

Structure

	Strongly agree					Strongly disagree				
16. The coalition maintains regular meeting cycles.	1	2	3	4	5	1	2	3	4	5
17. The coalition has active working groups and committees.	1	2	3	4	5	1	2	3	4	5
18. Members receive meeting agendas in advance and minutes after meetings.	1	2	3	4	5	1	2	3	4	5
19. Meetings follow the agenda and the planned work is accomplished.	1	2	3	4	5	1	2	3	4	5
20. The coalition has a viable organization structure that functions competently.	1	2	3	4	5	1	2	3	4	5

Communication

	Strongly agree					Strongly disagree				
21. Communication among members of the coalition is effective.	1	2	3	4	5	1	2	3	4	5
22. Communication between the coalition and the community associated with its chosen issues is effective.	1	2	3	4	5	1	2	3	4	5
23. Coalition members respectfully and productively work through differences.	1	2	3	4	5	1	2	3	4	5
24. All coalition members are listened to and heard, regardless of gender.	1	2	3	4	5	1	2	3	4	5

Activities

	Strongly agree					Strongly disagree				
25. Information gets exchanged at coalition meetings.	1	2	3	4	5	1	2	3	4	5
26. The coalition develops new materials and new programmes.	1	2	3	4	5	1	2	3	4	5

	Strongly agree			Strongly disagree	
27. The coalition advocates for change.	1	2	3	4	5
28. The coalition facilitates the sharing of new perspectives on issues.	1	2	3	4	5
29. The outcomes are more comprehensive than those that could be achieved without the coalition.	1	2	3	4	5

Outcomes

30. What changes have occurred because of the coalition that would not have otherwise occurred?

31. The coalition has been able to achieve its goals and create concrete outcomes.	1	2	3	4	5
32. The coalition serves as a catalyst for positive change related to the issues it has chosen to work on.	1	2	3	4	5
33. The coalition bring about community change as seen in changes to programmes, policies and practices that improve people’s lives.	1	2	3	4	5
34. The coalition has effected changes to programmes, policies and practices in many sectors and systems in the community related to the issues it has chosen to work on.	1	2	3	4	5

Definitions

Programme changes can be new or modified interventions, protocols and products, such as educational materials, marketing or branding materials and new presentations.

Policies can include facility or agency policies, state policies, federal policies and institutional policies.

Practice changes can include changes to facilities and other institutions and organizations; changes by various practitioners (including physicians, nursing or social work staff members or facility administrators); changes by government; and changes by individuals affected by the issue.

35. What specific changes to programmes, policies and practices have you seen that were created by the work of this coalition?

	Strongly agree					Strongly disagree				
36. The outcomes created are necessary and effective.	1	2	3	4	5	1	2	3	4	5
37. After each activity or project, the leadership of the committee or task force evaluates how it went in order to learn from experience.	1	2	3	4	5	1	2	3	4	5

Relationships

	Strongly agree					Strongly disagree				
38. Old or existing partnerships have been enhanced as a result of the coalition.	1	2	3	4	5	1	2	3	4	5
39. New partnerships have been built as a result of the coalition.	1	2	3	4	5	1	2	3	4	5
40. Members of the community associated with the issue now know more about each other’s resources as result of the coalition.	1	2	3	4	5	1	2	3	4	5

Systems Outcomes

	Strongly agree					Strongly disagree				
41. The coalition has brought about systems changes, including changes to relationships in the larger community that works on the issues the coalition has identified and in the capacity of the coalition to address emerging issues.	1	2	3	4	5	1	2	3	4	5
42. There have been positive changes in the community working on the coalition’s issues(s); as a result of the coalition, partners are more collaborative and more cooperative.	1	2	3	4	5	1	2	3	4	5
43. The coalition has helped people in the community access more resources both within and outside the coalition.	1	2	3	4	5	1	2	3	4	5

Benefits of Participation	Strongly agree		Strongly disagree		
44. The community and its residents are better off today because of the coalition.	1	2	3	4	5
45. I have benefited from participating in the coalition through:					
a. Building relationships with other coalition members;	1	2	3	4	5
b. Exchanging information with others and networking;	1	2	3	4	5
c. Working with others on issues of importance; and	1	2	3	4	5
d. Being part of a process that brings about meaningful change.	1	2	3	4	5
46. My organization has benefited from its participation in the coalition through:					
a. Modified programmes;	1	2	3	4	5
b. New programmes;	1	2	3	4	5
c. Access to new or more resources; and	1	2	3	4	5
d. Creating solutions collaboratively with other coalition partners.	1	2	3	4	5

Overall Rating

47. What changes have happened in your own organization as a result of the coalition that would not otherwise have occurred?

48. Have there been any surprising or unplanned outcomes as a result of the coalition?

49. What are the three most significant outcomes resulting from the coalition?

Annex 11

First Meeting Sample Agenda

TOOLS FOR CHAPTER 3 OF THE GUIDE: THE COALITION START-UP MEETING

This agenda can be adapted based on the length of the meeting, participants' familiarity with each other, their past experiences of working together and the specific needs of the coalition. If there is limited time for the meeting, it is better to attempt to accomplish less rather than trying to move through everything more quickly. It is important to remember that groups that have not previously worked together need more time for discussions than those that have collaborated before. If the meeting lasts more than two hours, make sure to schedule adequate time for breaks in the agenda.

Remember to circulate the agenda among participants in advance of the meeting.

Sample Agenda

15 minutes	Welcome, review meeting purpose and agenda
10 minutes	Introductions
10 minutes	Purpose of the coalition: <i>Present initial thoughts on the scope of the coalition that the group hopes to mobilize and the issues it will address. Note that this may change over the course of the meeting. Ask if anyone has preliminary questions or feedback.</i>
5 minutes	Ground rules (see Chapter 3 of the Guide)
10 minutes	Small group icebreaker (see Chapter 3 of the Guide)
10 minutes	Moving debate
60 minutes	Issues mapping (adjust the questions below based on the coalition's specific focus): <i>Of the issues that the coalition seeks to address, what are the most pressing issues facing the community?</i> <i>What are the context, history and community climate of the issues identified by the group?</i> <i>What are the root causes of these issues?</i>

- What is currently being done to address this issue?*
- Where are there gaps in current efforts?*
- Why is building a coalition a helpful approach to addressing these issues?*
- What is it that the coalition can do together that members could not accomplish independently?*
- 20 minutes Coalition values:
- What are the values that members share that should guide the work of the coalition?*
- 30-45 minutes Coalition vision:
- Small group visioning exercise*
- Full group discussion to build a shared vision*
- 30-45 minutes Coalition purpose and goals:
- The purpose of this session is to establish preliminary agreement on the coalition's purpose. A planning meeting should be scheduled shortly after the start-up meeting to more fully develop the coalition's goals and objectives.*
- Based on the issues map, what are the most immediate needs that can be addressed by the coalition?*
- How can the coalition put its values into action and move towards its vision?*
- What other issues are important and closely related to the coalition's purpose?*
- 30-45 minutes Coalition membership:
- Based on the coalition's goals and issues map, who else should be part of this coalition? Who should approach them?*
- Should the coalition establish any criteria or requirements for coalition membership? Is it prepared to work with anyone in order to move towards its goal or are there groups or individuals that it will not work with? Why/why not?*
- 30 minutes Next steps, responsibilities and timeline:
- Who will do what and by when? How will coalition members share responsibilities and hold each other accountable?*
- 15 minutes Closing exercise (see Chapter 3 of the Guide)

Annex 12

The Stages of the Consensus Process

TOOLS FOR CHAPTER 4 OF THE GUIDE: STRUCTURE, GOVERNANCE AND LEADERSHIP

A multitude of models for achieving consensus exist. Some groups develop very detailed procedures, while others follow a more organic process. The following process outlines the stages that are common to most models. While it is not always necessary to go through a formal process for each and every decision the coalition makes, it is a good idea to regularly practice applying a model. A group's familiarity with the process can really help when it comes to making difficult or complex decisions.

This model will work well in groups of about 15 to 20 people. Larger groups may need to build in extra steps in order to ensure that everyone is able to participate fully.

Consensus Flowchart*

Step 1: Introduce and clarify the issue(s) to be decided

Share relevant information. Work out what the key questions are.

Step 2: Explore the issue and look for ideas

1. Gather initial thoughts and reactions. What are the **issues** and **concerns**?
2. Collect **ideas** for resolving the concerns and write them down.
3. Have a **broad-ranging discussion** and debate the ideas:
 - a) List the pros and cons;
 - b) Think about solutions to the concerns; and
 - c) Eliminate some ideas, shortlist others.

Step 3: Look for emerging proposals

Is there one idea, or a series of ideas, that combine the best qualities of the ideas discussed? Develop a solution that everyone might agree on and create a proposal.

* Developed by Seeds for Change. For a more detailed description of the consensus process and other tools for facilitating consensus in a group, see: <https://www.seedsforchange.org.uk/>.

Step 4: Discuss, clarify and amend the proposal

Ensure that any remaining concerns are heard and that everyone has a chance to contribute.

Look for **amendments** that make the proposal even more acceptable to the group.

Step 5: Test for agreement

Have coalition members reached an agreement? Check for the following:

- **Blocks:** A fundamental disagreement with the proposal that cannot be resolved. Participants who block the proposal will want to develop a new one;
- **Stand asides:** When participants do not support the proposal but decide to let it pass without them;
- **Reservations:** When participants voice some reservations but are willing to support the proposal's adoption;
- **Agreement:** When participants support the proposal and are willing to help implement it; and
- **Consensus:** No blocks, not too many stand asides or reservations? Active agreement? Then the group has reached a decision!

Step 6: Implement the decision

Establish the who, when and how. Define the various tasks, assign responsibilities and set deadlines, etc.

Annex 13

What to Do When Things Go Wrong*

TOOLS FOR CHAPTER 6 OF THE GUIDE: SUSTAINABILITY

What to do when things go wrong		
Symptoms	Problem	Solutions
<ul style="list-style-type: none"> • Failure to plan • Failure to act • Delays • Frustration 	Lack of focus or direction	<ul style="list-style-type: none"> • Clarify the coalition's vision, mission and goals • Develop an action plan • Monitor progress in implementing the action plan
<ul style="list-style-type: none"> • Past grievances surface • Unequal sharing of resources • Disruptive meetings • Hidden agendas • Lack of trust 	Turf battles and competition	<ul style="list-style-type: none"> • Recommit to the coalition's vision for the community • Develop statements of the coalition's values • Prevent or openly address conflict • Promote face-to-face discussions to identify partners' concerns and needs • Use informal conciliation • Use third-party mediation
<ul style="list-style-type: none"> • Member and leader burn-out • Unreasonable demands on staff • New members fail to engage in work • Frustration • Resignations occur • Imbalance of power among organizations 	Unequal sharing of power, decisionmaking and responsibilities	<ul style="list-style-type: none"> • Develop written responsibilities and roles for staff, leaders and members • Create memorandums of understanding for all member organizations • Meet with CEO/Director of each organization yearly to clarify expectations • Review action steps at the end and start of meetings • Hold annual coalition retreat to train members on team building and delegation • Allow each organization one vote when adopting decisions, etc.

* Developed by Coalition Work, see: <http://coalitionwork.com/>.

What to do when things go wrong		
Symptoms	Problem	Solutions
<ul style="list-style-type: none"> • Members are uninformed about meetings/events • Infighting erupts • Members and community do not see the results of their efforts 	Ineffective Communication	<ul style="list-style-type: none"> • Promptly circulate minutes • Distribute monthly (electronic) newsletters and items for partners' newsletters • Develop and distribute a one-page organizational message • Hold an annual "state of the coalition" address to review progress and future plans
<ul style="list-style-type: none"> • Dominance by professionals • Some community sectors are not well represented • Coalition is not respected or known in community • Community groups do not support coalition and its work 	Poor links to the community	<ul style="list-style-type: none"> • Conduct a gap analysis to ensure diverse representation • Engage in a serious recruitment campaign • Hold meetings and events in accessible, neutral sites • Speak about coalition opportunities at community events • Support activities of other community partners
<ul style="list-style-type: none"> • Ineffective working groups • Ineffective steering committee • Failure to develop, maintain or rotate leadership • Poor attendance • High "dropout" rate • Lack of ongoing training • Inadequate funding • Lack of results 	Ineffective coalition structure or function	<ul style="list-style-type: none"> • Conduct strategic planning to realign mission and goals with the coalition's structure and function • Develop an organization chart • Hold an annual retreat and orientation for leaders • Institute one- to two-year leader term limits and annual elections • Commit to effective meetings and reporting • Have veteran leaders and members mentor new ones • Establish resource development or steering committees to develop budget, resources and funds

What to do when things go wrong		
Symptoms	Problem	Solutions
<ul style="list-style-type: none"> • Poor or inconsistent attendance • Lack of follow through on tasks 	Time and loyalty conflicts	<ul style="list-style-type: none"> • Use surveys and discussions to identify the best meeting times and fit between talents and tasks • Conduct an annual review of commitment letters • Where relevant, ask organizations to send new representatives with more time to offer coalition • Have Chairs follow up non-attenders and those who fail to finish tasks • Ensure meetings are able to be attended by people with child care responsibilities including breast-feeding mothers.
<ul style="list-style-type: none"> • Coalition is not recognized by media or key community leaders • Coalition's grant or funding applications are unsuccessful • Recruiting members and leaders is difficult • Expected outcomes do not occur • Community problems are unresolved 	Lack of outcomes	<ul style="list-style-type: none"> • Develop a logic model, action plan and evaluation plan • Collect data and consistently monitor short, intermediate and long-term outcomes to hold partners accountable and help align efforts • Co-ordinate each partners' activities via an agreed upon action plan • Use one-page organizational message and social media to broadcast successes to the public, as well as current and prospective members and leaders • Contact foundations and funders to explore funding opportunities

Annex 14

Sample Post-Training Evaluation Form for the Training Session

Gender

- female male other/prefer not to say

Training Confidence

How confident are you in your ability to:

8. *Navigate the Coalition Building Guide?*

- Absolutely not Not really Almost Completely

9. *Build a new coalition or contribute to an existing coalition?*

- Absolutely not Not really Almost Completely

10. *Lead a coalition start-up meeting?*

- Absolutely not Not really Almost Completely

11. *Create a framework for coalition governance, structure, and leadership that reflects the values of your coalition?*

- Absolutely not Not really Almost Completely

12. *Develop a coalition plan?*

- Absolutely not Not really Almost Completely

13. *Encounter problems that are likely to arise in your coalition building efforts?*

- Absolutely not Not really Almost Completely

14. *Incorporate elements of sustainability into your coalition plan?*

- Absolutely not Not really Almost Completely

15. *Track and evaluate the efforts of your coalition?*

- Absolutely not Not really Almost Completely

Learning application

16. How confident do you feel about applying the gained knowledge in your activities?

- Very weak Weak Good Very good Excellent

17. How often do you expect to be able to apply the gained knowledge in your activities?

- Never Rarely Sometimes Often

Satisfaction

18. Was the content of the training session relevant to your needs?

- No, absolutely not No, not really Yes, partially Yes, completely

19. Was the information conveyed during the training session easy to understand?

- No, absolutely not No, not really Yes, partially Yes, completely

20. Was the overall quality of the training session satisfactory?

- No, absolutely not No, not really Yes, partially Yes, completely

Training methods and trainers

21. How did you rate the teaching method?

- Very weak Weak Good Very good Excellent

22. How do you assess the opportunities for interaction with the trainers?

- Very weak Weak Good Very good Excellent

23. How do you rate the quality of the Curriculum, handouts and other training materials?

- Very weak Weak Good Very good Excellent

Please rate your trainers in the following areas:

24. Knowledge of the subject

- Very weak Weak Good Very good Excellent

25. Creating interest in the subject and activities

- Very weak Weak Good Very good Excellent

