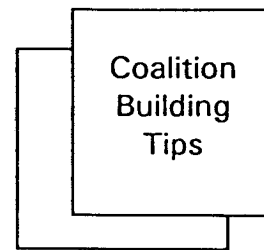


Coalition Planning

by David Foster, Community Partners

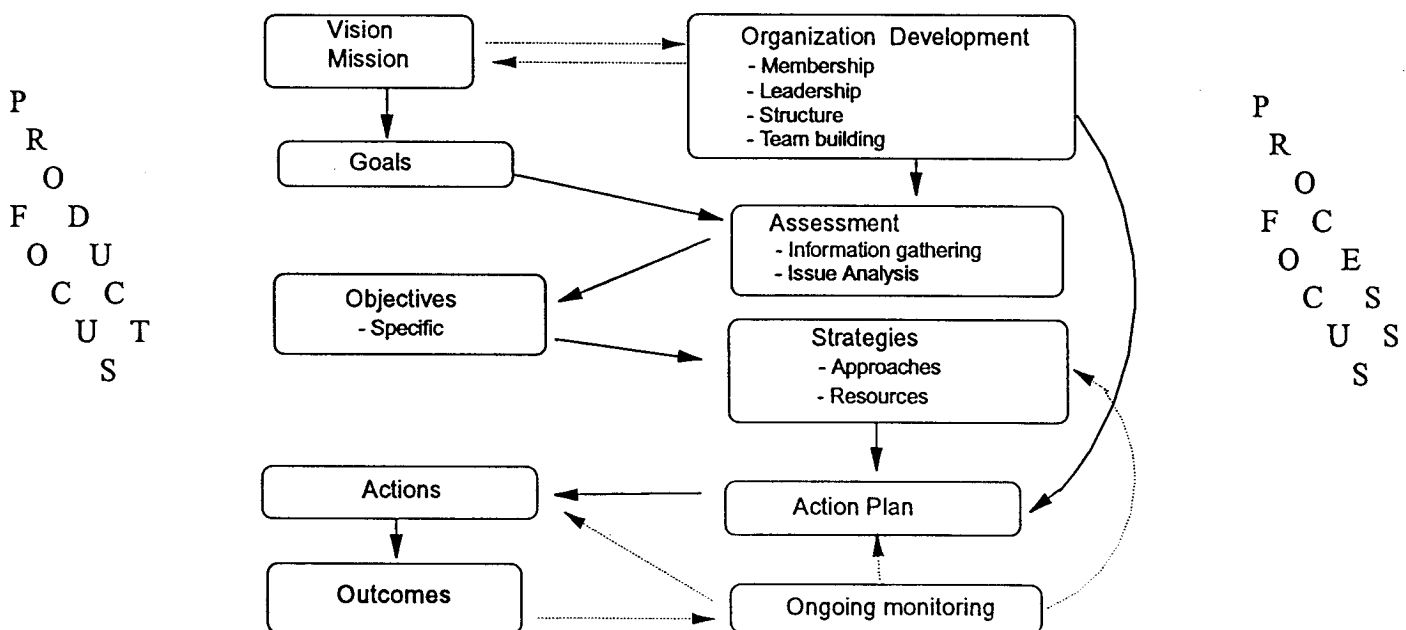


"If you're not sure where you're going, any road will get you there," said some wise person, but the journey will likely be a meandering and unsatisfying one. Coalitions, particularly new ones, often struggle with the consequences of this. Unless they are required by some external force (e.g., a funder) to have a clearly articulated plan, there is often little inclination to do real planning. This may be due in part to the absence of structure, particularly hierarchy, at the outset. If it's no one's "job" to instigate the planning, it often doesn't happen. Activity often results from reacting to a crisis or taking on some member's special concern, but there is no mechanism for taking a long view, setting priorities, or being proactive.

Planning by coalitions is designed to systematically define the desired products (destination) and develop a workable process (route) that results in the actions needed to create the desired products. As shown in the diagram below, there are several stages in defining the desired products, each becoming more specific, and several aspects of process which, when woven together, lead to concrete action and the desired outcomes, if all goes well.

The planning scheme described here represents a comprehensive approach that will be useful for most coalitions. In reality it is rarely followed in its entirety, often due to a feeling that it takes too much time or that the group already knows what needs to be done so 'let's just get on with it'. While a variety of short cuts may be taken without serious ill-effects, in the long run coalitions are most productive when they adhere to good planning.

For the readers to whom this is familiar, perhaps it may serve as a reminder of its applicability to coalitions.



□ Vision/Mission

Early in a coalition's development it is important to establish a written mission statement which articulates a broad sense of its common purpose. This establishes the overall arena in which the coalition wants to work and how it hopes things will be different in the future. For some coalitions this is a straight-forward task, for others it is the product of considerable labor and negotiation. *EXAMPLE: The mission of the Coalition is to enhance the quality of life for all residents by ensuring that community resources are maximized and visible, through education, advocacy and action.*

□ Organizational Development

The work of building the coalition into a viable organization goes on in parallel with product-focused work. It is interactive with vision/mission development since the concerns of those initially at the table frame the mission, which then defines who needs to be at the table and how they should be organized (e.g., formal vs. informal). As part of organizational

development, a sound structure is needed, with committees or work groups that will do the work and bring their findings/recommendations back to the whole group for review. *Officers, Committees (Executive, Substance Abuse, Community Health Education, Community Relations, Membership)*

Ongoing attention to team building is essential and needs to be part of the planning process.

Goals

Defining goals helps give focus to the broad direction by establishing the basic domains that need to be acted on and the general outcomes that will help achieve the mission. *To educate community residents about health issues affecting infant mortality.*

Assessment

Once these broad goals are established, a variety of information is often need before they can be operationalized. The assessment process involves gathering information and analyzing it. It addresses questions such as: what are the real issues involved in achieving these goals? what needs to be done to achieve them? what forces are already at work? who's affected, interested or already involved? what are realistic outcomes - amounts, time frame?

Objectives

With the information from the assessment process, the group can develop specific objectives. These serve to define the desired outcomes in more precise terms, with quantified targets and time frames whenever possible. *Train two teams (10-12 people each) of community health outreach workers in the next eighteen months.*

Strategies

These specific objectives lead directly to a discussion of strategies - how do we get there from here. What needs to be done? Who needs to be involved (who will be most affected)? What material resources are required? How can they be obtained? What barriers can be anticipated and how might they be overcome? What is the best sequence of activities? These discussions are about building a strong, well-thought-out foundation for action. *Have coalition staff work with tenants' council to recruit neighborhood residents; get coalition members to volunteer as trainers.*

Action Plan/Actions

With these strategy questions answered, it is a relatively simple task to devise a written plan for action. This lays out specific action steps, in sequence and/or in parallel, to implement the strategy. The plan should identify a specific individual or work group who is responsible for each action and set time frames for its completion. *Within two weeks, "X" will recruit "Y" and "Z" from the coalition to teach 2 sessions of the training.*

The implementation of this plan by coalition members is in some sense the culmination of the planning process, leading to the outcomes defined in the goals and specific objectives.

Ongoing Monitoring/Evaluation

But how do we know that all is happening the way it's intended? Ongoing monitoring is a critical process of keeping track of what is supposed to be happening and how things are going. It asks if the people assigned tasks in the action plan are getting them done. It then considers how we know what the actual outcomes of the completed action are, and whether they are what the coalition had intended (in terms of type and amount). Finally, it asks what adjustments in earlier steps (strategies → actions) may be needed to improve the quality or quantity of outcomes. *At each Executive Committee meeting the prior months' minutes are reviewed to assure there has been follow-through on tasks assigned.*

An evaluation steps back further to see if the mission is still valid, if the goals need to be updated, if the structure is working effectively, if the group's work is valued by those within and/or outside the coalition, if member morale and commitment are high, etc. *There will be an annual member satisfaction survey to determine how the coalition is, and is not, meeting the members' expectations.*

This process is doable, but it requires a collective discipline within the coalition, along with a willingness to take the time needed to help assure a better outcome and thus a more sustainable coalition.