



ADVANCING HEALTHCARE
EXCELLENCE AND INCLUSION



building bridges
AND ESTABLISHING
community coalitions

Coalition building toolkit

This toolkit includes a step-by-step guide to coalition building, coalition building activities and advocacy information. Use these tools to help your team define your impact area, establish partnerships, set shared priorities and sustain your efforts.

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How to Build a Coalition

A step-by-step guide on engaging community partners to advance health equity

Identify the problem

1. Review data to identify disparities in health outcomes
2. Stratify data by race, socioeconomic status, age and geography
3. Confirm that the identified problem is supported by evidence (objective measures)
4. Review your organization's Community Health Needs Assessment/Community Health Improvement Plan
5. Develop criteria to prioritize issues
6. Clearly define the problem (see *How to write a problem statement*)
 - Identify the gap between where you are and where you want to be
 - Describe how long the problem has existed
 - Quantify the gap (cost, time, quality, personnel)
 - Explain the importance to the organization, the community, a person, etc.

Tools: [Community Assessment](#), Community Anti-Drug Coalitions of America [Community Health Assessment Toolkit](#), AHA Community Health Improvement

Establish your internal health system team

1. Consider inviting staff from the following departments:
 - government relations;
 - public relations/marketing;
 - community health/benefits;
 - advancement;
 - diversity/equity/inclusion;
 - population health and health equity;
 - research;
 - case management/social work;
 - quality/performance improvement;
 - clinical staff;
 - information technology;
 - data analysts; and
 - c-suite leadership.

Tool: [Team Charter Canvas](#), Design a Better Business

Build respectful partnerships

1. Understand each partner's expected level of participation

Tool: [Spectrum of Public Participation](#), International Association of Public Participation

2. The community should be heavily involved in the process of gathering information, with emphasis on community members' voices and lived experience. Facilitate the process of prioritizing and identifying root causes within a community using the tools below.

Tools: [Mobilizing for Action through Planning and Partnership](#), National Association of County and City Health Officials
[Starting a Coalition](#), Community Tool Box

Identify community-based partners and invite them to join your team

1. Understand your community, particularly the agencies/leaders related to your issue
2. Identify potential partners and their assets. Consider infrastructure, leadership support, existing relationships, ease of partnering and whether you have a similar mission

Tools: [Fostering Hospital Community Partnerships](#), pages 16-17, AHA
[Team Charter Canvas](#), Design a Better Business

Organize a kickoff meeting

Determine what kind of meeting will work best.

1. Join an existing community collaborative:
 - If many of your desired partners have an established meeting, ask to join them for a session to pitch your idea and ask for partnership.
 - Reach out to leadership before showing up.
 - Consider sharing information with the group ahead of time.
 - Be open to meetings that do not look like health system meetings.
 - Establish clear next steps.
2. Invite a partner to your existing meeting:
 - If you only need one or two additional community partners, invite them to your meeting.
 - Reach out to their leadership to explain your request and share why you selected them.
 - Seek input on how to make the meeting convenient — this may mean modifying existing meeting times or processes.
 - Share the agenda and create clear expectations for partners.
3. Host a new meeting with all partners:
 - Establish an hour-long meeting with new partners to signify a fresh start.
 - Use a meeting scheduler to make sure you can accommodate as many partners as possible.

- Create and distribute a clear agenda that begins with significant time to meet and get to know each other.
 - Prioritize community-based meeting locations and consider an informal meeting format.
 - End the meeting with clear next steps.
4. Host a longer retreat, or “synergy meeting”:
- Use the format for new meetings, allowing more time for conversation and work.
 - Set aside significant time to develop trust and work together.
 - Get food!
 - Schedule breaks so that your partners do not get burnt out.
 - Do not exceed a half day, and ensure your participants do not feel trapped.

Develop a path to success in your impact area

1. Use an action planning tool to help your group identify the goals, strategies, resources and responsibilities required to achieve the agreed-upon goal. As you walk through each column in the worksheet, you will identify:
 - specific actions needed;
 - resources needed;
 - who will be the lead and/or provide support from each organization;
 - a timeline for when each action should be completed;
 - activity outcome/output measures; and
 - the current status of the activity.

Tools: [Building a Culture of Health: Community Collaborative Action Plan](#), page 27, AHA
[Do Tank Vision Canvas](#), Do Tank

Writing a problem statement (activity)

This document provides an overview of the basic components that make up a problem statement. This tool can assist your organization with developing its own problem statement to address any needs, concerns or improvement areas.

Problem statement tool

Identify the key components of the problem:

- **Gap:** Identify the gap between where you are and where you want to be.
- **Timeframe and trend:** Describe how long the problem has existed and what kind of trend it is following (i.e., is it getting worse?).
- **Impact:** Quantify the gap (cost, time, quality, environmental, personal, etc.).
- **Importance:** Describe the importance of this problem to the organization, the community, an individual, etc. to better understand the urgency.
- **Problem statement:** Summarize the problem in two to three sentences.

Sample problem statement

- **Gap:** Patients in the North Country lack reliable transportation to and from the hospital. The hospital's single outside EMS provider cannot support the patient volume.
- **Timeframe and trend:** This has worsened recently.
- **Impact:** Patients miss appointments or get stuck in the hospital with no way to get home. Patients that need to be transferred to a higher level of care are not transferred.
- **Importance:** Patients do not get the right level of care on time and cannot get home. These barriers cause frustration with the health system. Patients may also delay care until it's an emergency, increasing the likelihood of poor outcomes. Missed appointments also have a financial impact on the hospital.
- **Problem statement:** Patients in the North Country lack reliable transportation to and from the hospital. The hospital relies on a single outside EMS provider that cannot support the hospital's patient volume. As a result, patients miss appointments, remain in the hospital too long, are not transferred to the correct level of care on time and put off preventive care. This causes patient harm and has a negative financial impact on the hospital.

Helpful tips for writing a problem statement

- Look for the problem, not the solution.
- Keep the statement to two to three sentences.
- Distinguish between symptoms and the problem itself.
- Know your resources and their strengths.

Identifying potential partners and their assets (worksheet)

This worksheet helps you evaluate potential partner organizations, identify assets they can contribute to the coalition and understand the relevance of the initiative to each organization’s mission.

Partner organizations’ assets may include skills, resources and expertise that are crucial to establishing a successful coalition that may not be available in your organization. Assets can be people, places, community services and organizations, all of which can be used to improve the quality of life within a community.

Ask the following questions to help identify community partners and their assets.

Identify organizations in your community	Identify organizational assets
<p>Ask the following questions:</p> <ul style="list-style-type: none"> • Where do you go to school? • Where do you work? • Where do you buy groceries? • Where do you go out to eat? • Where do you shop for non-food items? • Where do you get together with friends? • Where do you get involved in community issues? • Where do you go for arts and recreation? • Where do you go for healthcare? • Where do you worship? 	<p>Ask the following questions:</p> <ul style="list-style-type: none"> • What skills do their employees bring to the table? • What are their internal resources? • Who is their market or audience? • How do they reach their market? • Who are their partners and what are their assets?

Potential partner worksheet

List organizations in your community that could be potential partners and list their assets.

	Organizations in your community	Organizational assets		Organizations in your community	Organizational assets
Community organizations			Local businesses		
Educational organizations			Public health organizations		
Faith-based organizations			Service organizations		
Healthcare organizations			Funding organizations		
Government			Other		

Source: [Fostering Hospital-Community Partnerships](#), pages 16-17, AHA

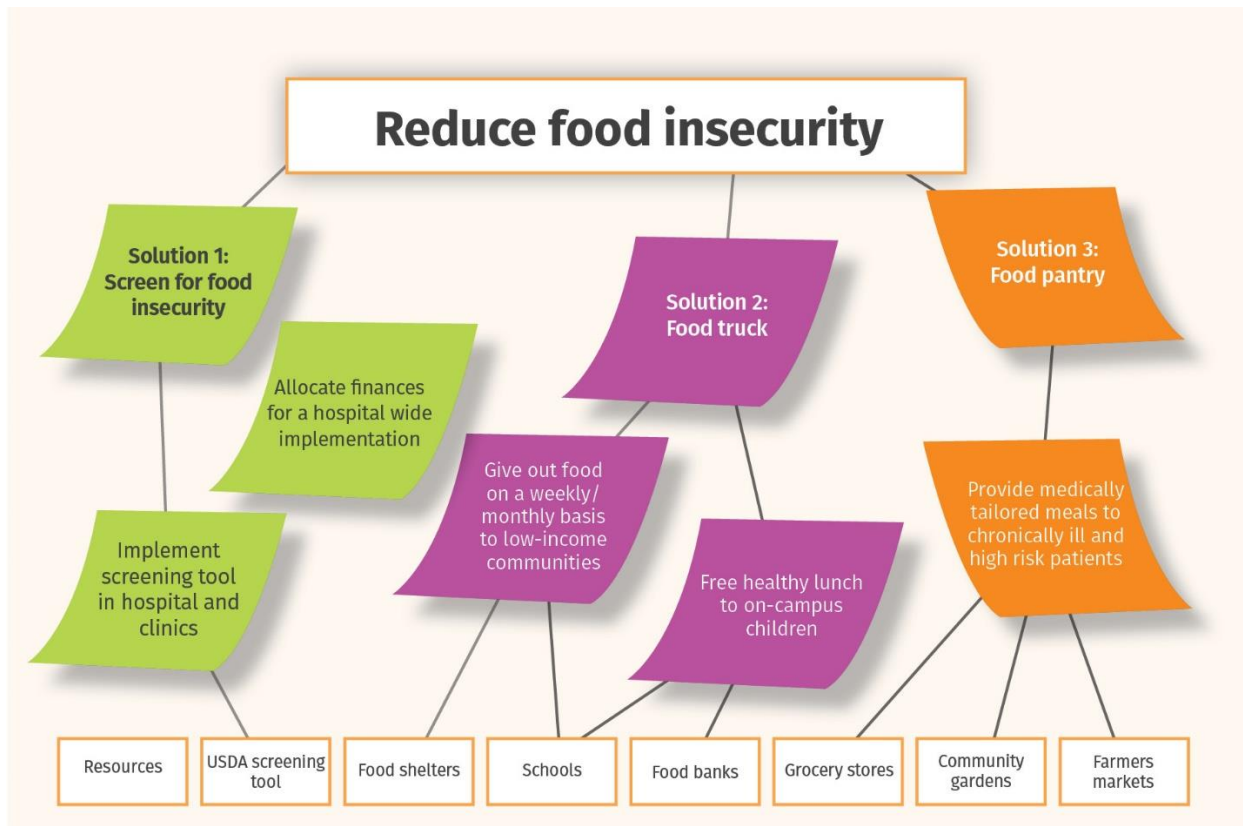
Identifying solutions collaboratively (activity)

Once all partners have agreed upon the purpose of your group, develop an action plan for how you will accomplish the task at hand. Facilitate a “brainstorming” session using the instructions below. This activity uses writing instead of talking to generate ideas from your partners. It solicits input from everyone and creates space for new ideas and creative thinking, leading to solutions that may not be obvious.

Brainstorming activity

1. Write your goal at the top of a large piece of paper/whiteboard.
2. Write down available resources at the bottom of the paper/whiteboard.
3. Have your meeting participants (partners) add their own sticky notes with additional resources and strategies that may lead to possible solutions.

Source: [Fostering Hospital-Community Partnerships](#), page 25, AHA



This activity is one of many that your group may find useful in identifying solutions as a group. Consider using it alongside other collaborative visioning exercises to gather input from all participants.

Advocacy solutions

To address communitywide changes in health equity, your coalition may engage in strategies to gain the participation of people and organizations in the community and key decision makers from different sectors. Local decision makers include elected and appointed officials, institutional or organizational leaders and other individuals or groups involved in policy making in your community.

Using this approach, your coalition may focus on:

- **policy initiatives** (e.g., funding for community vaccine hubs or a community violence prevention program); or
- **changes to the built environment** that impact community and patient populations (e.g., creating equitable access to affordable transportation and healthy food).

Building relationships with decision makers

One of the most effective strategies to support advocacy solutions is to build relationships with local decision makers. Consider one of the following approaches:

- Educate your elected officials about your mission, services and impact on their constituents. Use personal stories whenever possible.
- Tell your elected official how a government grant your organization received has helped your constituents.
- Educate elected officials about the effects of a policy on their constituency.
- Invite an elected official to visit your organization so they see firsthand how government funding or policies affect day-to-day operations and the community's ability to access services.

Source: [How to Advocate as a Nonprofit for Older Americans](#), National Council on Aging

Changing existing policies

Consider how your coalition may actively participate in the policymaking process. Consider taking these steps to positively impact the social determinants that influence health equity.

- Assess the situation and consider policy implications upfront.
- Develop a list of key decision makers for coalition participants to contact based on their interest in the issue.
- Provide concise summaries, data and talking points to guide conversations with policymakers:
 - create a one-page fact sheet for each issue and draft talking points;
 - provide current health outcomes or social determinants data to illustrate the problem; and/or
 - provide information on existing policies, examples of successful policies and information on the issue as it is experienced by your community.

- Build community capacity to communicate with decision makers by partnering with other groups that have similar interests.
- Work with coalition members to craft simple statements about the issue and include specific implementation strategies to share with decision makers and the media.
- Bring the issue to policymakers' attention, using patient stories, when possible, to personalize the issue.

Understanding the limitations of advocacy by 501(c)3 organizations

If your coalition or partnership is considering policy-change strategies, be aware that most organizations that receive public funds or have 501(c)3 status cannot participate in lobbying activities. Lobbying activities include letter or phone campaigns, petition drives, promoting a position on a specific legislation, or endorsing or opposing a candidate.

Organizations may involve themselves in issues of public policy without the activity being considered lobbying. Organizations may conduct educational meetings, prepare and distribute educational materials or otherwise consider public policy issues in an educational manner without jeopardizing their tax-exempt status.

Source: [Charities and Nonprofits: Lobbying](#), IRS

Additional Resources

[Promoting Health Equity – a Resource to Help Communities Address Social Determinants of Health](#), CDC

[Coalitions as a Tool for Advocacy - Evidence and Lessons Learned](#), TCC Group Inc.

[Everyday Advocacy](#), National Council of Nonprofits

[Why Advocate?](#), Stand for Your Mission

[How to Advocate as a Nonprofit for Older Americans](#), National Council on Aging