

FORMATION STAGE

What to Expect. In this stage, the coalition is initially organized. Potential members are identified. As each organization is recruited, they explore their motivations for joining the coalition and the potential costs and benefits of participation. Each organization spends time sharing information and learning what each need and can contribute. The group begins to define the community problem or issue to be addressed. If they plan to move forward as a coalition, they must recognize the need for joint action in focusing on the issues, as well as the need for independence.

Strategy. Coalition is young - the strategy is to compete and survive.

Structure. Structure is highly individualized and allows growth within limits of resources. Convening group identifies needs or issues and seeks to involve others; relies on donated or pro bono resources while looking for funding; and researches structure or models to follow.

Tasks

- Initiate collaboration, cultivate allies & begin to develop its purpose
- Identify potential member organizations' common, complementary & competing goals
- Identify core group of members based on community issue, needed expertise and resources
- Recruit & meet with members to discuss perceptions, hopes & concerns about coalition; solicit advice about how to address community issue
- Hold first coalition meeting & reach consensus on coalition mission
- Create ground rules for coalition functioning & etiquette
- Develop coalition goals and objectives
- Develop member criteria & participation agreements; verify members' ability to decide/take action on behalf of their organizations
- Decide who will speak for/represent coalition & criteria for acknowledging members publicly
- Develop communication & feedback mechanisms with member organizations

Products or Outcomes

- Recruitment plan
- Member roster
- Ground rules or meeting etiquette
- Membership agreements
- Mission statement (purpose)
- Coalition goals & objectives
- Logo & publicity materials (stationery, banner)

Recruiting Members. Consider the following factors when recruiting organizations to your coalition:

- Activities and accomplishments?
- Contributions (power, time, talent, resources)?
- Self-interests (personal & organizational gains)?
- Potential conflicts?