

# The Coalition Builders' *Guide*



**SYPartners**

# Systemic challenges require collective action.

Across sectors and continents, coalitions have been created to address systemic challenges as diverse as climate change, racial justice, responsible technology, and womens' rights.

But coming together is only the beginning. From aligning stakeholders around a shared vision, to nurturing dialogue across differences, to scaling solutions that spark change, building and running effective coalitions is a complex undertaking.

That's why the Aspen Institute and SYPartners have joined forces to gather insights on the "how" of coalition-building.

Drawing on interviews with accomplished coalition builders, and decades of experience convening leaders, this guide contains distilled learnings about how to build effective coalitions.



**SYPartners**

# What this playbook is— and is not.

Throughout this guide, a *coalition* is defined as a *group of organizations working together to achieve a shared goal*.

The coalitions considered here are those that have been intentionally planned and formally structured—as opposed to collectives and movements that emerge and dissolve with limited structure.

Though these formal coalitions come in all shapes and sizes, each with their own characteristics and traits, there are often significant commonalities in how they come together, stay together, and disband.

This guide seeks to explore these patterns and provide insight on how to navigate them effectively, through clear frameworks and practical questions. It is not an exhaustive set of step-by-step instructions, but a tool for reflection and planning.

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**A wide range of coalition builders generously contributed their time and expertise to the guide:**

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**40**

COALITION LEADERS

ACROSS

**5**

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FROM

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ORGANIZATIONS

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# Who this guide is for.

This guide is for coalition builders and leaders, as well as participating organizations.

Feel free to choose your own adventure and focus only on those sections that are most helpful to you based on your expertise and the moment your coalition is in.

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Here are examples of possible paths through the guide:

- **For those thinking about forming a coalition,** start with Chapter 1 to clarify your aspirations.
- **When designing a new coalition,** use Chapters 2, 3, 4 and 5 to lay the foundation for future work.
- **When running a coalition,** use Chapters 6, 7, 8 and 9 to help support effective collaboration and sustain momentum.
- **For well-established coalitions,** use Chapters 2 and 10 to reflect on the coalition's progress and deepen its impact.

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# Glossary of Terms

<b>Coalition</b>	A group of organizations working together to achieve a shared goal	<b>Champions</b>	Member representatives, their deputies, or their colleagues who are charged with driving change in their organizations
<b>Vision</b>	The future that the coalition is working to create	<b>Central coordinator</b>	The person or team responsible for running the day-to-day operations of the coalition, from fundraising, to research, to meetings, to stakeholder engagement
<b>Strategy</b>	The approach and actions that bring the vision to life	<b>Participants</b>	Any member organizations or representatives
<b>Member organizations</b>	The organizations that have formally joined the coalition ('organizations' for short)	<b>Member representatives</b>	The individuals chosen to represent member organizations in the coalition ('representatives' for short)

# 1

## **Outline a vision and strategy**

A coalition is nothing without a vision and strategy—a clear articulation of where the coalition is going and a sense of how it will get there. Together, vision and strategy serve to keep stakeholders energized and aligned.

# A Assess the need

Coalitions take time, energy, and resources. Build them only when there's a clear need that is not already being addressed by others.

## Identify the challenge or cause.

What challenge or cause are you trying to address?

*E.g., Decarbonizing the maritime shipping industry*

*Clarity of cause is key. Coalitions formed around a vague challenge often fail to drive impact.*

## Assess the landscape.

What organizations or coalitions are working on this challenge?  
What are their unique approaches?

*If others are already doing the work, look for ways to build on it.*

## Don't be duplicative.

Would joining forces with these organizations or coalitions help accelerate the path to a solution?

Yes

No

Build on what already exists.

Start a new coalition.





# Articulate the vision

To bring people together and keep them engaged, create a shared view of why the coalition exists—the future you’re collectively fighting for.

## Shared vision

In once sentence, describe the future the coalition is striving to create:

*Aim high—don't limit your ambition to the low-hanging fruit.*

*E.g., Ensuring companies can move their maritime freight using zero-emissions solutions by 2040 without paying a premium*

## Accountability

Who is the coalition accountable to?



## Develop the strategy

It's not enough to agree on where the coalition is going. To ensure success, there must also be alignment on how the coalition will get there—and what obstacles may stand in the way.

### Theory of change

What will the coalition do to affect change?  
How will acting together—rather than separately—make that possible?

*E.g., Build a buyers alliance, enabling companies to direct their resources and buying power toward zero-emissions solutions, sending a powerful demand signal to the market.*

### Outputs

What is the coalition working to develop?

- Research
- Tools and practices
- Standards and guidelines
- Policy recommendations
- Communication campaigns
- Other \_\_\_\_\_

### Goals and metrics

What are the coalition's specific goals?  
What metrics will be used to measure success?  
Who will be responsible for measuring?

*E.g., By 2030 we will measure success based on our collective contribution to the shipping sector's S-curve deployment goal of 5% of global shipping using zero-emission fuels and technologies.*

**Outline the coalition's greatest...**

Strengths:

Opportunities:

Weaknesses:

Threats:

AN EXAMPLE

**The Audubon Society**

In the late 1800s, a network of local, citizen-led societies dedicated to the protection of birds and their habitats emerged across the United States. In 1905, they joined forces to launch the National Audubon Society, which advocated for the conservation of wildlife and restrictions on over-hunting, leading to some of the nation's earliest and most significant environmental laws and regulations.





## **Envision the arc of the coalition**

From the very beginning, imagine the full lifespan of the coalition—the exciting early days, the messy middle, the end, and the coalition’s legacy.

# A

## Map the lifespan

Understand where you are in arc of your coalition's lifespan and what it should look like to be at each stage. Ensure your key stakeholders see it the same way.

1

### Where is the coalition today?

Is the coalition still being conceived? Early in its life? Halfway through? Nearing the end?  
Place an X on the timeline below.

3

### What are the milestones essential to ensuring the coalition's success?

Place them on the timeline between the current moment and the coalition's end.

CONCEPTION

BIRTH

DEATH  
(OR REBIRTH)

LEGACY

2

### When will the coalition end and why?

It can be a date, a milestone, or any positive or negative factor.

4

### What will ensure the coalition's legacy?







AN EXAMPLE

### **Associated Press**

In 1846, the Associated Press (AP) was established by five New York City newspapers as a cooperative to share the costs of gathering news by telegraph. This arrangement allowed the newspapers to pool resources, reducing the costs of reporting from remote locations and enhancing the speed and reliability of news distribution. Over time, AP grew into one of the world's largest and most trusted independent news organizations, providing content to numerous media outlets across the globe.

# 3

## **Choose a funding model**

No matter its potential for impact, a coalition cannot operate effectively without proper funding. And while there is no one-size-fits-all approach to ensuring adequate financing, a few models can serve as inspiration.



A

# Consider pathways

There are many ways to fund a coalition, but two of the most common are through member fees or philanthropy. Reflect on which models you've seen work well and which would best serve your coalition moving forward.

## Member Fee model

## Philanthropy model

## Other

### PROS

**Cooperation**

Creates a collective resource pool, fostering a sense of collaboration

**Reputation**

Signals that members are invested in the cause

**Risk mitigation**

Allows for less reliance on a single source of funding

**Scalability**

Ensures that funding grows alongside the coalition

### CONS

**Barriers to entry**

Can limit participation of organizations with fewer resources

**Power dynamics**

Emboldens members to use financial leverage for control

**Perceived impropriety**

Can foster perception of 'pay to play'

**Time-intensive member engagement**

Requires ongoing member relations and recruitment efforts

### PROS

**Reliability**

Can serve as a steady and reliable source of income

**Visibility**

Signals relevance and credibility, drawing others to the cause

**Inclusivity**

Allows inclusion of members who may not have the resources to pay fees but whose contributions are vital

**Expertise**

Can bring additional expertise to the coalition, enhancing overall effectiveness

### CONS

**Dependency**

Creates vulnerability to changes in donor priorities and support

**Influence**

Empowers larger donors to exert control over the direction of the work

**Brand confusion**

Donor brand and mission color perception of the coalition and its work

**Complexity**

Introduces reporting, fiscal, or administrative requirements that can be unfeasible for smaller organizations

What other models could you leverage?

*E.g., Consulting fees, certification fees, special events, content/tool subscriptions, crowdfunding, in-kind contributions...*

How does/could this model benefit your coalition?

How does/could this model benefit your coalition?

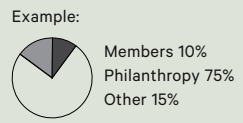
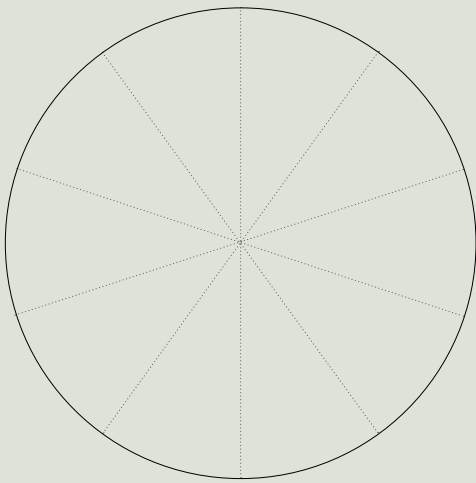


C

# Strengthen funding mix

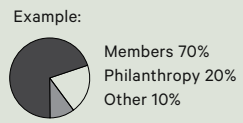
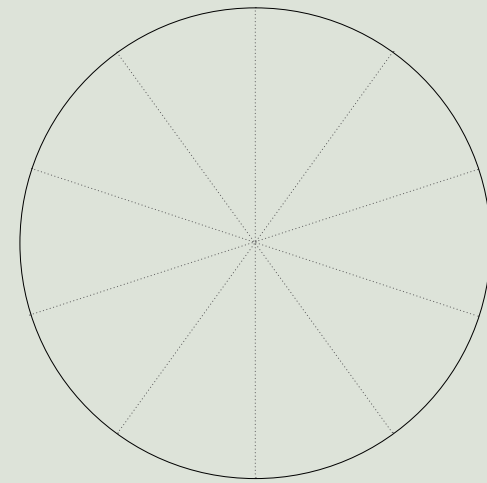
Ensuring a diversity of funding sources is also critical. Explore where your funding comes from today and how those sources might be diversified over time.

**1** **Where does your funding come from?**  
Make a pie chart with each slice representing a current source and its approximate size.



How well is this funding model working?

**2** **Where would you like your funding to come from?**  
Make a pie chart with each slice representing a desired future source and its approximate size.



What would it take to shift to this future model?



AN EXAMPLE

### **International Organization for Standardization**

In 1946, delegates from 25 of the world's leading industrial economies came together to launch the International Organization for Standardization (ISO), an independent, non-governmental entity responsible for developing international standards, covering all key elements of manufacturing and technology. One of the most important standards ISO governs is for shipping containers, enabling the smooth flow of global trade.

# 4

## **Curate participants**

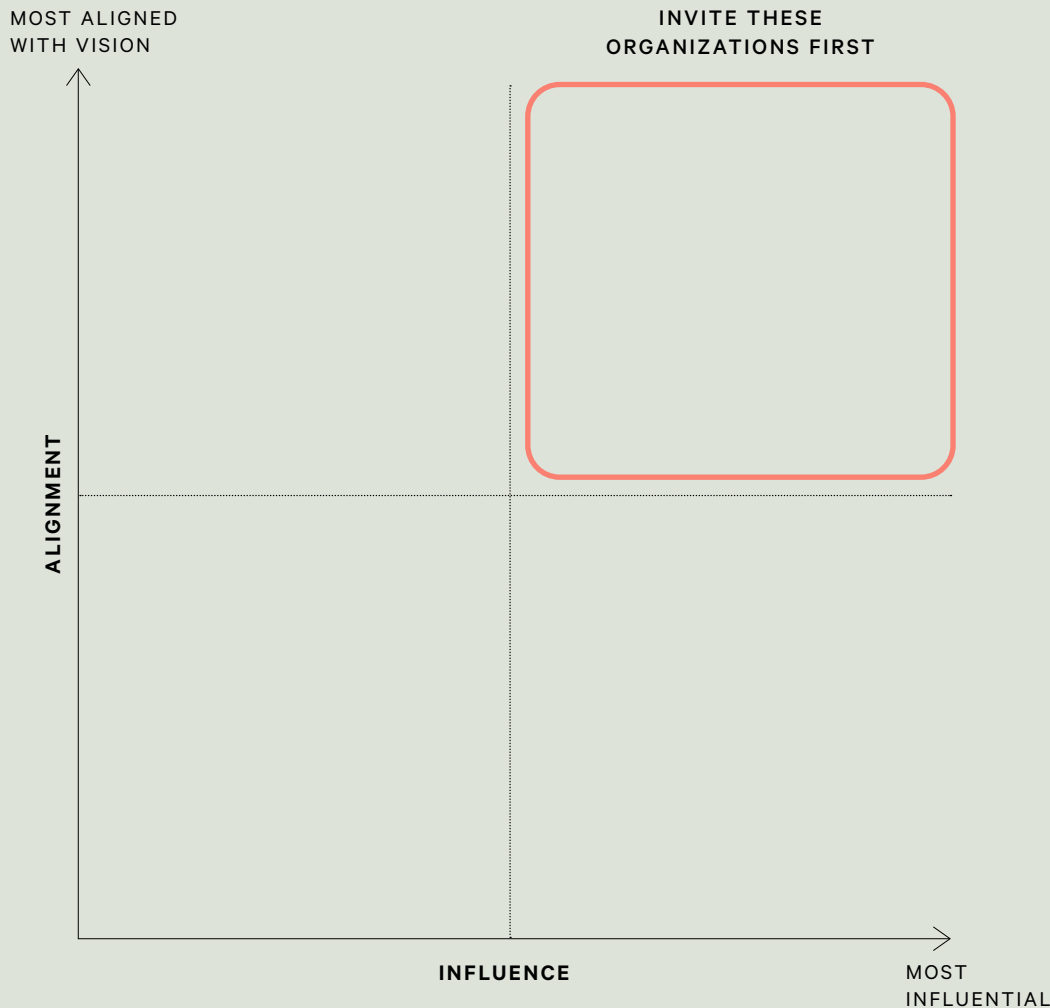
Selecting the coalition's participants is critically important. The key is to find the right mix of capabilities and perspectives—balancing established decision-makers and experts with unexpected and underrepresented voices.

# A

## Choose member organizations

Finding the right mix of organizations is critical. To ensure success, it's important to consider who you bring on when, and why.

### Map potential member organizations:



**Start small.**  
*No matter the eventual size of the tent, be selective about the first organizations you invite to join you inside it.*

**Mind your tent.**  
*Big tents can foster a sense of inclusion but they can also make coalitions messy and unfocused. Get clear on what you want to achieve and then find participants who share that ambition.*

**Look for alignment.**  
*Focus first on the organizations that are most aligned with the coalition's vision and strategy.*

**Build influence.**  
*Early on, prioritize member organizations that can leverage their reputation and platform to get others to join and drive engagement.*

**B**

# Enlist a diversity of roles

Successful coalitions draw on a diversity of participants with complementary capabilities to achieve their ambitions. If you already have participants, consider who else you might bring in to round out the group.

*Coalitions are like dinner parties. It's all about who you invite and how you bring them together.*

**1**

**Who is already a participant?**

**2**

**What new voices should be invited in?**



## Decision-makers

Leaders with the power to approve and support the outputs of the coalition



## Funders

Backers providing the resources needed to power the coalition




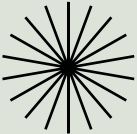


## Visionaries

New voices that can bring unexpected, innovative perspectives to the coalition



## Experts

Specialists with the subject-matter expertise required to inform and shape the work of the coalition

	<p style="text-align: center;"><b>1</b></p> <p style="text-align: center;"><b>Who is already a participant?</b></p>	<p style="text-align: center;"><b>2</b></p> <p style="text-align: center;"><b>What new voices should be invited in?</b></p>
 <p><b>Storytellers</b></p> <p>People who can rally participants by building the narrative of what's possible and making progress visible</p>		
 <p><b>Catalysts</b></p> <p>People with the influence and reach to drive awareness and adoption of the coalition's outputs</p>		
 <p><b>Implementers</b></p> <p>Practitioners responsible for using and implementing the outputs of the coalition</p>		
 <p><b>Stakeholders</b></p> <p>People and groups that will be most affected by the outputs of the coalition—both positively and negatively</p>		

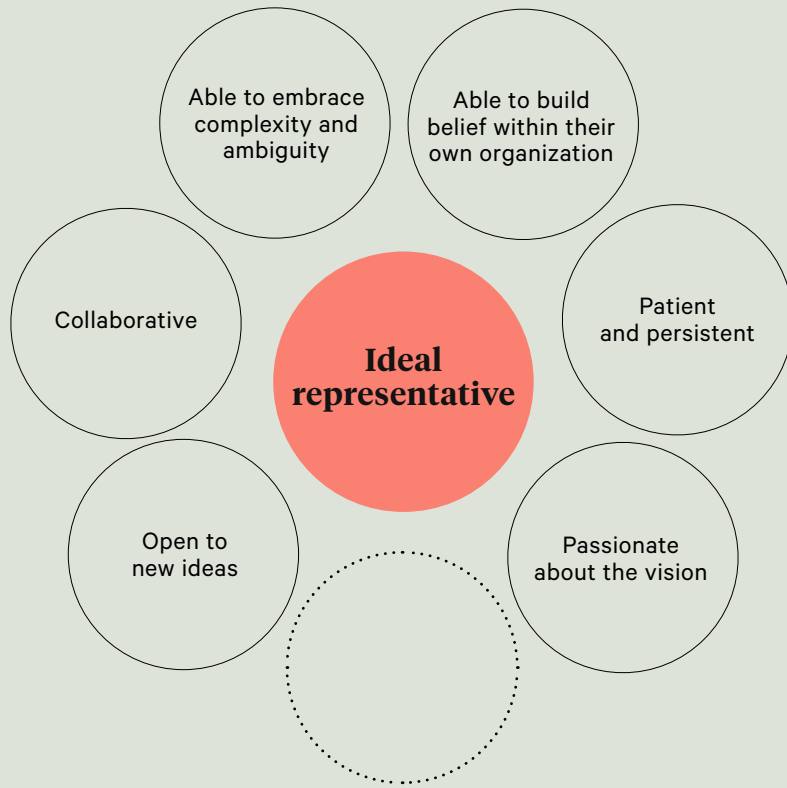
Note: Any given participant can play multiple roles.



C

# Seek out key traits

While the role of each participant is critical, their personality traits are equally important. Understand participants' current strengths and weaknesses so you know what to look for when recruiting specific individuals.



**What other traits would you add?**

Which of these traits are most abundant among your current participants?

Which of these traits are most lacking among your current participants?





## AN EXAMPLE

### **Business in the Community**

In 1982, HRH The Prince of Wales launched Business in the Community (BITC) to motivate businesses in the UK to tackle prevalent social issues and advocate for responsible business practices. The organization aims to harness the power of British businesses to create a positive impact on society by focusing on developing a skilled, inclusive workforce and promoting environmental sustainability. Over the years, BITC has grown to include hundreds of member companies collaborating on initiatives designed to improve community engagement, workplace inclusivity, and sustainability, positioning businesses as a force for good in society.



# 5

## **Understand participants**

Each coalition participant will join for their own reasons. To ensure they get the most out of the time and resources they put in, it's critical to understand what's driving their participation and to clarify what is expected of them.



# A

## Understand member organizations

Look for ways the coalition might create value for each member organization, understanding their unique motivations and addressing their specific needs.

For each member organization, ask **Are they motivated by...** \*

**Deepening their knowledge and expertise?**

YES  NO

How will you upskill them?

**Building new relationships and connections?**

YES  NO

How will you help them build connections within the coalition?

**Driving adoption of their products or programs?**

YES  NO

How will you create opportunities to showcase their products and programs?

**Strengthening their reputation and brand?**

YES  NO

How will you strengthen their reputation in an authentic way?

**Influencing a wider ecosystem?**

YES  NO

How will you help shape the ecosystem to benefit them—and the coalition?

*\*Repeat this exercise for each member organization.*

# B

## Understand member representatives

Explore the motivations of the individuals representing each member organization to better understand how they can be supported in achieving their goals, and how they might best contribute to the coalition.

For each member representative ask... \*

What motivates and inspires them?	What roadblocks are standing in their way?	How can their participation help advance their personal goals?	What role(s) can they best play in the coalition?	How else might they contribute to the coalition?
			<ul style="list-style-type: none"><li><input type="radio"/> Decision maker</li><li><input type="radio"/> Funder</li><li><input type="radio"/> Visionary</li><li><input type="radio"/> Expert</li><li><input type="radio"/> Storyteller</li><li><input type="radio"/> Catalyst</li><li><input type="radio"/> Implementer</li><li><input type="radio"/> Other:</li></ul>	

\*Repeat this exercise for each member representative



AN EXAMPLE

**Society for Worldwide Interbank Financial  
Telecommunication (SWIFT)**

In 1973, a collection of leading governments and banks launched SWIFT, a network designed to enable financial institutions worldwide to send and receive information about financial transactions in a secure, standardized, and reliable environment. Today this network includes more than 11,000 financial institutions in more than 200 countries.



**Enable  
collaboration**

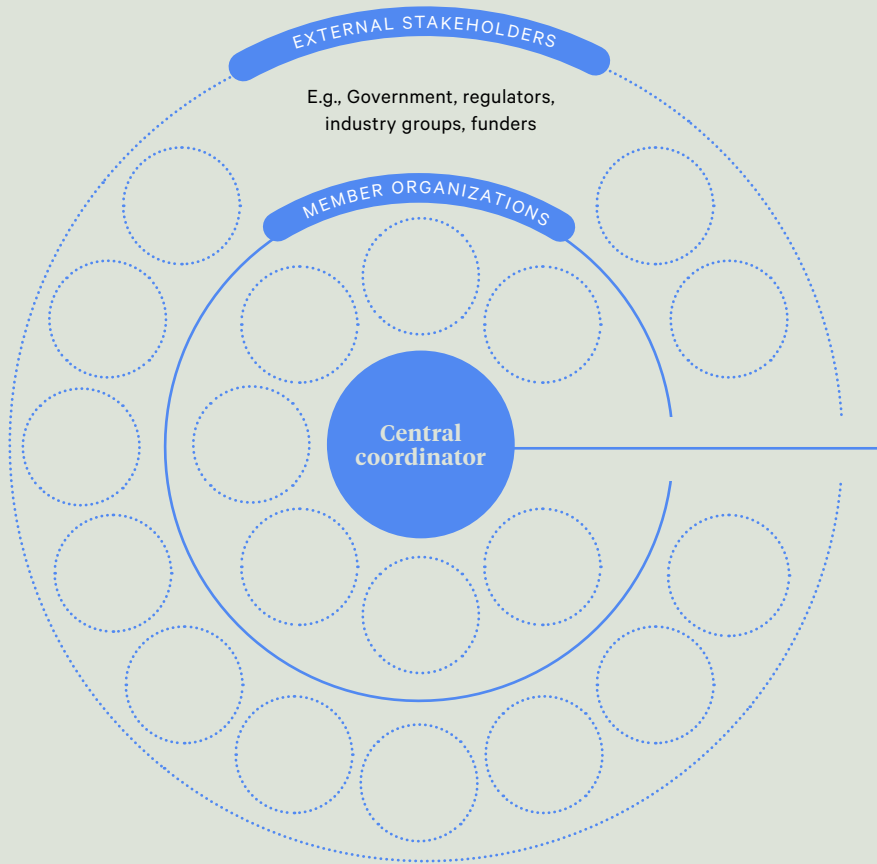
Ultimately, the success of any coalition comes down to its members' ability to work together. To turn aspiration into collective action, the work of the coalition needs to be coordinated through shared norms and systems.



# A

## Empower a central coordinator

At the heart of every successful coalition is a central coordinator—a person or team who rallies and convenes stakeholders, helps build trust and understanding, and keeps participants focused.



*Don't forget to fund your operations. Without the coordinator and their team, the coalition can't thrive.*

While the coordinator role will vary from one coalition to the next, key responsibilities can include:

**Shape work**—plan initiatives, gatherings, partnerships, and communications.

**Engage coalition members**—build rapport with organizations and their representatives, ensure they understand their roles, serve as a conduit between them.

**Develop materials**—conduct research and create starting points that enable members to build and make decisions.

**Prepare meetings**—define the cadence, manage invitations, and outline the agenda and goals for each gathering.

**Facilitate convenings**—help move conversations toward clarity and alignment while ensuring all voices are heard, especially in tough or contentious moments.

Who is (or will be) the coalition's central coordinator?

What time and resources are needed to make the role successful?

**B**

## Create shared rules of engagement

Each member comes to the coalition with their own beliefs, ideas, and experiences. It's what makes collective action powerful, but also complicated. To ensure alignment and accountability, it's critical to develop shared rules of engagement.

**What rules will guide interactions across the coalition—fostering involvement and respect among participants?**

Take inspiration from the 'Brave Space Agreements' used at SYPartners:

- + Practice being present.
- + Listen deeply enough to be changed by what you hear.
- + Speak from the "I" perspective.
- + You always have a right to pass.
- + Take space, make space.
- + When things get difficult, turn to wonder.
- + Acknowledge intent, center impact, ensure accountability.
- + Accept non-closure.
- + "What's said here stays here; what's learned here leaves here."

Adapted from East Bay Meditation Center, based on Visions Inc., "Guidelines for Productive Work Sessions"



## Craft shared language

Given the different backgrounds members bring to a coalition, a shared language acts as a bridge—aligning participants around common definitions for the concepts that are most important to the coalition’s work.

**What concepts are essential to the work of the coalition?  
List and define them below:**

**Concept or Term**

**Definition**

# D

## Design intentional convenings

To get things done, you must set participants up for success, preparing the materials they need to make decisions and designing the spaces they will use to enable collaboration.

- + Begin by clearly stating the purpose of the meeting: What do you hope to achieve? This sets the tone for the entire discussion.
- + List agenda items in order of importance to ensure key topics are addressed even if the meeting runs out of time.
- + Designate clear roles for meeting participants (time-keeping, note-taking...).
- + To help maintain momentum, conclude meetings by aligning on key takeaways and any follow-up actions or decisions needed.

When possible, offer the option of a hybrid meeting to ensure that more people can participate. Pay equal attention to virtual and in-person participants.

Circular or semi-circular seating arrangements can help create a sense of equality and inclusivity.



Ensure all participants have clear visibility of each other and any visual aids (whiteboards, screens, etc) to promote engagement and nonverbal communication.

Arrange seating to encourage proximity among participants to promote feelings of closeness.

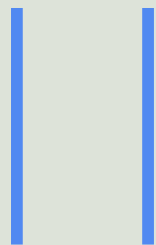


When possible, move participants from time to time in order to avoid the impression of "in" vs. "out" crowd.

E

# Embrace parallel play

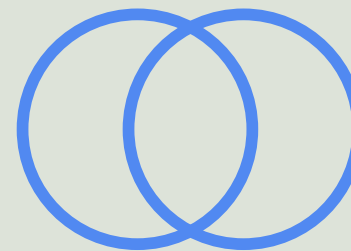
Coalitions are designed to encourage cooperation and collaboration. But that does not require having everyone in the same room all the time. The key is knowing when—and when not—to bring people together.



## Work in parallel

Divide the coalition into smaller groups when the work can be organized in different tracks requiring specific expertise. This enables participants to lean into their strengths, feel a sense of autonomy, and drive progress on multiple fronts.

How could the work be divided into separate tracks, allowing parallel play?



## Work together

Bring the whole coalition together for moments of alignment and collective decision-making. This leverages the shared energy, intelligence, and power of the group.

When is coming together necessary?

# F

## Facilitate tough conversations

Even when participants are aligned around a shared ambition, some amount of conflict is inevitable. Honing your ability to navigate dissent and disagreement is crucial to maintaining the trust, cooperation, and collaboration required to sustain your coalition's momentum.

Reflect on these best practices for facilitation and add your own.



**Set expectations and boundaries**—make it clear what is and is not up for discussion.



**Create inclusive spaces**—listen actively, ensure everyone has a chance to be heard, and prevent the loudest voices from dominating the discussion.



**Play back what you heard**—drive clarity and alignment by repeating key points, ensuring everyone heard the same thing in the same way.



**Move to the middle**—guide participants toward areas of alignment, even if they're not ready to agree to every detail or word.



**Return to the vision**—bring participants back to their shared goals when tensions rise and disagreements surface.



**Disagree and commit**—create space for debate and disagreement, but ensure that once a decision is made, everyone backs it fully.



**Embrace shuttle diplomacy**—go back and forth between stakeholders—before, during, and after convenings—to understand motivations.

What else would you add?





#### AN EXAMPLE

### **Zero Emission Maritime Buyers Alliance**

In 2023, the Aspen Institute—along with Amazon, Patagonia, and Tchibo—launched the Zero Emission Maritime Buyers Alliance (ZEMBA), a first-of-its-kind buyers group to accelerate commercial deployment of zero-emission shipping solutions. Its ambition is to enable economies of scale for freight buyers and suppliers, and help cargo owners maximize emissions-reduction potential beyond what any one freight buyer could accomplish on their own. ZEMBA is an initiative of the Cargo Owners for Zero Emission Vessels (coZEV), a broader effort to decarbonize the maritime sector, launched in 2020.





## **Build trust**

Fostering trusted relationships among members is essential to the work of every coalition. These relationships serve as the foundation for everything a coalition does and create resilience that can be counted on in moments of struggle.



A

# Deepen connections

Building trust requires patience, transparency, and consistency. It's about giving participants the space they need to share authentically and build personal connections.

## How can trust be deepened across the coalition?

### Be transparent.

*Communicate the coalition's successes and challenges. Narrate the process to help participants understand where they are in the journey.*

### Encourage connection.

*Create the conditions for deeper, more personal relationships to flourish across the coalition.*

### Build psychological safety.

*Hold space for authentic sharing, allowing participants to be emotionally open about both their excitement and frustration.*

### Stay true to the vision.

*Participants joined to support a specific vision. Stay focused on these goals to avoid creating confusion and misalignment.*

### Be patient.

*Building trust takes time. It requires commitment and patience from all stakeholders.*

How will you better communicate obstacles and wins?

How will you create opportunities to build relationships among participants? What shared rituals can help reinforce connection?

How will you foster psychological safety among participants?

How will you reconnect the work to the original vision?

How will you pace the work to bring more people along?

AN EXAMPLE

**Global Polio Eradication Initiative**

In 1988, the World Health Organization—in collaboration with Rotary International, the CDC, and UNICEF—launched the Global Polio Eradication Initiative, a groundbreaking public-private partnership committed to ending polio worldwide. Since its inception, with significant backing from the Gates Foundation, this decades-long effort has achieved a 99% reduction in cases around the world.





**Develop and  
deploy solutions**

Coalitions are built to scale impact. Their success is measured by the extent to which the solutions they develop are embraced by those who need them most. This requires designing for momentum and adoption.



# Design for momentum

Collective challenges are complex and finding solutions takes time. To keep stakeholders engaged—both inside and outside the coalition—look for ways to demonstrate progress and sustain momentum.

## How will you maintain a sense of progress?

### Get quick wins, celebrate them.

*Acknowledge your impact and celebrate your wins, no matter how small. It will help sustain momentum and raise morale.*

### Elevate existing efforts.

*Be a multiplier. Partner with other organizations, institutions, and collectives to promote or scale ongoing work.*

### Build things together.

*The act of making things together—from new tools to new standards—bonds participants and builds momentum.*

### Seek progress over perfection.

*Know where you need to be a perfectionist and where you don't. Look for opportunities to start moving and build as you go.*

What quick wins can you focus on?

With whom could you partner to accelerate impact?

What tangible output could you create to bring participants together and show progress?

Where is “perfection” truly required in your work? Where is it not?

**B**

# Design for adoption

To drive adoption of the coalition's solutions, get clear on what it will take to ensure they are integrated into the organizations, industries, and systems they are designed to support.

List the solutions that the coalition has created or is planning to create:

*You need to identify the incentives that will help ensure that the coalition's outputs are used and adopted.*

<b>Solutions:</b>	AUDIENCE <b>Who is the solution for?</b>	USE CASE <b>How will they use the solution?</b>	COMMUNICATIONS + MARKETING <b>How will they learn about the solution?</b>	ACCOUNTABILITY <b>How will they be encouraged to use the solution?</b>





AN EXAMPLE

**The Intergovernmental Panel on Climate Change**

In 1988, the UNEP and WMO launched the Intergovernmental Panel on Climate Change (IPCC), to synthesize and share the latest scientific, technical, and socio-economic research on climate change and its solutions with global leaders and policy-makers. With contributions from hundreds of experts from countless governments, universities, and research institutions around the world, it represents one of the largest, most comprehensive research initiatives undertaken in any field. In 2007 the IPCC was awarded the Nobel Peace Prize alongside former US Vice President Al Gore.



## **Equip champions**

The organizations involved in the coalition matter a great deal. But more often than not, it's the individuals who represent them that are most critical to the coalition's success. The key is to ensure that those individuals have the knowledge and resources they need to drive impact within their own organizations.

A

## Enable member representatives

Equip member representatives with the strategy and tools they need to champion the coalition within their organizations.

**To champion the coalition in their respective organizations, member representatives must...**

### **Know who to engage.**

What do champions need in order to identify the stakeholders they should bring along?

E.g., Stakeholder maps

### **Make the case for change.**

What do champions need in order to build belief with their leaders?

E.g., Elevator pitch, narrative deck, business case, successful use cases from other companies...

### **Share the coalition's outputs.**

What do champions need in order to translate the work of the coalition back into their organizations?

E.g., Compelling materials capturing the coalition's outputs, templates helping tailor the outputs to each organization...

### **Smooth the path to adoption.**

What do champions need in order to support their organizations in adopting the coalition's outputs?

E.g., Clear guidelines and tools for adoption, communities of practice...





AN EXAMPLE

### **World Wide Web Consortium**

In 1994, Tim Berners-Lee founded the World Wide Web Consortium (W3C), an international organization responsible for developing and standardizing the protocols and guidelines that govern the internet and ensure its usability, accessibility, and growth. The consortium is comprised of more than 450 members from a range of institutions, from corporations to nonprofit organizations, universities to governmental bodies.

# 10

## **Assess progress**

As inevitable challenges surface, the coalition should stay true to its original vision. But it must also be adaptable enough to adjust its approach when conditions evolve. This requires taking time to step back, reflect, and assess progress.

# A

## Build the cadence

The key to reflection is remembering to do it. That means putting it on the schedule. Whether it happens every month, every quarter, or every year, build a cadence and stick to it.

### Timing

How often will you come together to assess progress?

- Quarterly
- Twice a year
- Once a year
- Other \_\_\_\_\_

### Scheduling

How will these moments align with your current meeting cadence?

- New, stand-alone meetings
- Built into existing meetings.  
If so, identify which ones:

\_\_\_\_\_

### Participants

Which stakeholders should be invited to take part in these moments?

**B**

# Reflect on progress

Once your cadence is set, take some time to plan the session. Consider how you might balance the need for deep discussion and reflection with the need for clarity about the path ahead.

**Invite participants to reflect on the state of the coalition using the following prompts to guide the conversation:**

**Challenges**  
What are the most important developments affecting the challenge addressed by the coalition?

**Vision and strategy**  
How might the coalition's theory of change or goals need to change?

**Ongoing work**  
How are the coalition's tracks of work advancing? What work is making progress? What work is stuck? Does the type of output produced by the coalition need to evolve?

**Stakeholders**  
How are key stakeholders feeling about the work? Are they engaged and excited? Why?

**Competitors**  
What are other players in the space doing? Are efforts duplicative? Could the coalition play an even more differentiated role?

**Resources**  
Are there enough resources, time, and energy to continue the effort?

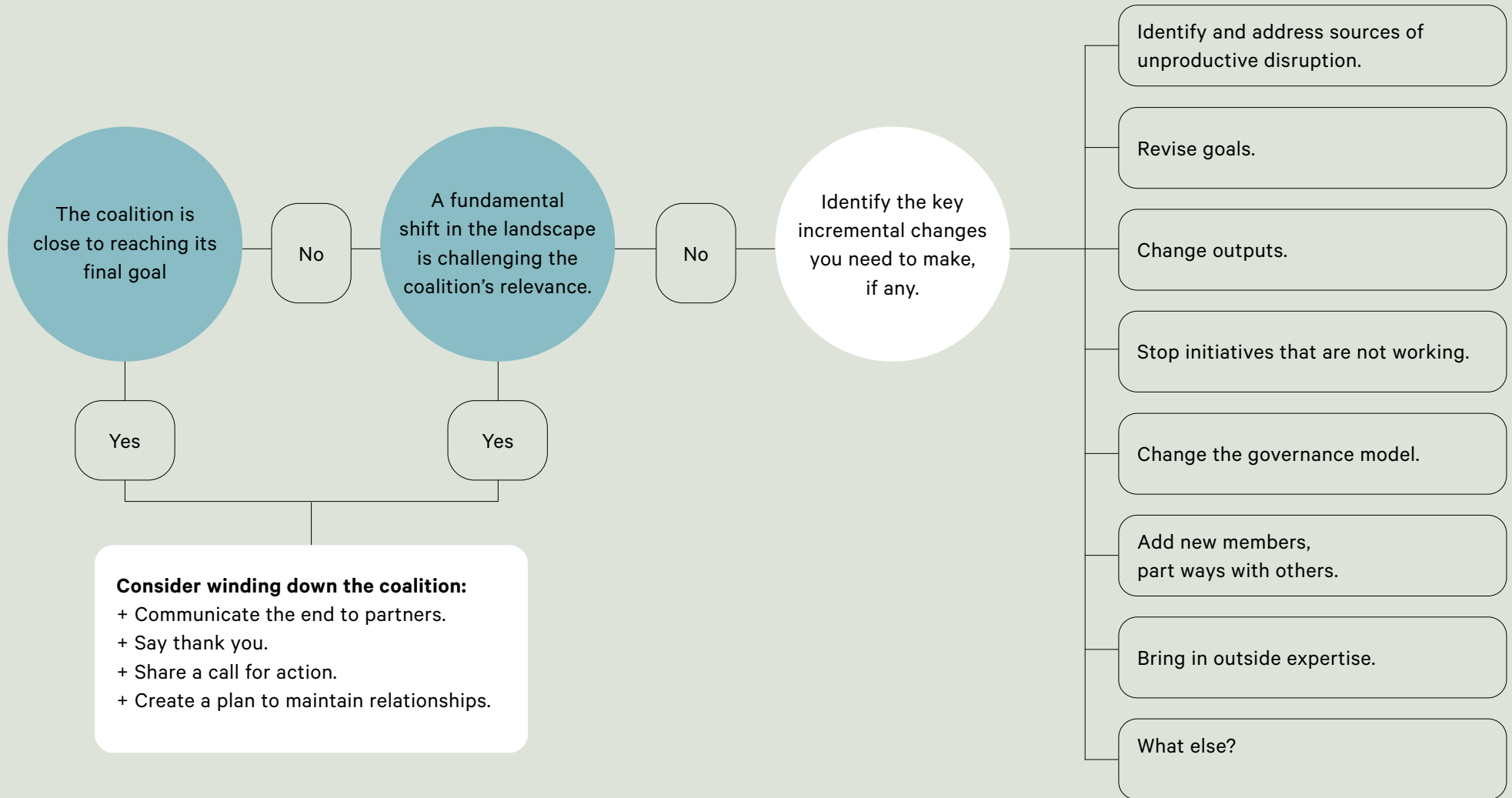
**Tipping points**  
Has the coalition reached a tipping point in its productivity or impact where other players or systems can take over?

# C

## Consider future options

Based on your assessment of the coalition's progress, outline the steps you must take to ensure you stay on track.

Chart your path forward.



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