



# Working with an Advocacy Coalition

A Chapter from the *Advocacy Training Manual* Produced by the Center for State and Local Policy  
Published by the Center for Preservation Leadership

Working with a coalition of advocates can greatly increase the chance of getting a preservation policy adopted or passed by a governmental body. Coalitions can also have a positive impact when organized for defensive reasons (e.g., protecting a historic site or an existing preservation policy). Identifying partners who can be of assistance and working with them in an equitable and responsible manner can increase the coalition's stature in the eyes of elected officials as well as the public they serve.

## What Is an Advocacy Coalition?

Coalitions formed for advocacy purposes generally consist of individuals, businesses, associations, and nonprofit groups. Representatives of government agencies can also participate by providing data or information that can be used by the coalitions. Many times coalitions are formed to address a single policy issue, although in some instances, coalitions seek to address a range of issues and develop a joint policy agenda. Whether they are permanent or formed temporarily for a specific purpose, all effective coalitions share a common trait—they are action-oriented and work toward a specific goal.

## Benefits Of Working With a Coalition

Coalitions offer several benefits. The old adage, “many hands make light work,” is true. With additional resources focused on achieving the preservation policy objective, you can now share the burden of planning events, working with the media, and educating the public, officials, and grassroots constituencies. Likewise, costs for activities such as hiring a lobbyist or direct

mail campaigns will be lower for each coalition member than if a single organization had undertaken an advocacy campaign on its own.

In addition to pooling financial and human resources, coalitions also offer the opportunity to increase credibility for your public policy purpose. Coalitions demonstrate a broad base of support to officials, and help create a compelling message that reaches a larger audience.

Examples of successful coalition-driven policy changes include the passage, protection, and amending of state rehabilitation tax credit programs. For example, the Coalition for Neighborhood and Economic Renewal worked to pass and continues to protect the Rhode Island Historic Preservation Tax Credit, first enacted in 2002. The 57-member coalition, led by Grow Smart Rhode Island, includes representatives from the tourism industry, city governments, developers, and Preserve Rhode Island. For more information about this coalition, including a list of the growing coalition membership, visit <http://www.growsmartri.com/taxcredit062407.html>

Other examples of public policy issues that could benefit from the efforts of a coalition include promoting amendments to a state building code to encourage rehabilitation and influencing school facility policy to change the bias that favors new construction over preservation.

## How To Get Started

Before creating or joining a coalition to work on a public policy issue, talk through objectives in advance with potential partners to avoid misunderstandings among members during the advocacy campaign. The first meeting of the coalition provides an opportunity to discuss the proposed policy, reasons for becoming involved, and plans for reaching the policy goal.

The following suggestions will help you create an effective advocacy coalition.

**Identify possible coalition partners and evaluate their potential.** Not surprisingly, preservationists have allies in many different fields. Consider approaching other types of organizations in addition to the typical preservation partners such as architects, developers, and planners, when planning a coalition. For example, landscape architects, historical societies, chambers of commerce, smart growth advocates, and environmentalists all share common interests and goals with historic preservationists.

The list of potential partners depends on each situation and may change over time, so brainstorm new partnership opportunities periodically. You might partner with a group during a specific legislative campaign and then find yourself partnering in the future with someone who took the opposite side in the previous campaign. Although there will always be someone or



National Trust President meets with Massachusetts Preservation Coalition members in December 2006 to discuss capitalizing on their successful campaign to increase of the state rehabilitation tax credit cap from \$10 million to \$50 million. Photo by Erin D. A. Kelly.

some groups opposed to your issue, remember that you might find them as allies down the road. Be careful not to burn bridges, even if there are disagreements.

Common partners in preservation coalitions include:

- Chambers of Commerce
- Realtors
- Business owners and business associations
- Tourism agencies
- Historic sites and museums
- Housing coalitions
- City governments and state agencies
- Farm Bureau and farmers
- Smart Growth or “Green” organizations
- Historical societies
- Heritage societies (e.g., Colonial Dames)
- Environmentalists
- Main Street organizations
- Arts organizations
- Neighborhood associations
- Developers
- Architects
- Planners
- Land Trusts
- Garden Clubs
- Neighborhood Community Development Corporations
- Vacant property groups
- Religious groups

Before approaching possible coalition members, consider the following questions:

**Would the potential partners benefit from participating in this advocacy campaign?**

If so, describe the benefits in a way that would appeal to their interest using familiar terminology. Preservation in and of itself is not always an obvious benefit that attracts a coalition partner. Often, you might find that preservation benefits a partner in another way. For example, preservation of downtown commercial districts attracts many concerned about smart growth, the protection of existing farmland, and the local economy.

**What’s the reputation of the possible coalition partner?**

Are you comfortable to be associated with the potential partner in the media?

**Does the partner understand the commitment?**

Building successful working coalitions takes time and may come at the expense of other programs. Potential partners should understand the expected time commitment.

**What does the partner bring to the table?**

Does the partner have supporters who will become engaged in an advocacy campaign? In what manner and how often does the partner communicate with its advocates? Does the partner have different or better connections with elected officials? Does it have a reputation within the policy community for being effective? Does it have access to additional financial resources?

**Agree on how to approach potential partners.** After considering all the possible partners and evaluating their ability to contribute to your advocacy effort, decide how to approach potential partners you have identified. In some instances, you

can easily accomplish this with a phone call to the person in charge. Often however, board-level approval is needed before an organization can commit to joining an advocacy coalition. State your reasons for being involved and outline the reasons why you think the change would also help the partner reach its goals.

**Write it down.** Although logistics may seem insignificant in the beginning, the best coalitions put things in writing. Jointly develop a written document that identifies the common campaign goals shared by all the coalition members, defines the strategic action steps, sets out responsibilities and expectations of coalition members, and establishes a schedule or timeline. Having the goal and action plan in writing will help potential coalition members understand the expected duration of the working relationship and will address potential areas of conflict and get them resolved before the campaign starts in order to avoid misunderstandings down the road.

**Hold regular meetings.** Agree to meet regularly, often face-to-face. Determine who has the best contacts and skills and divvy up the tasks accordingly. Keep notes of meetings and who is responsible for follow-up on assigned tasks. Thank coalition members for their work often and in a timely manner.

**Create a coalition name.** The name of the coalition should be succinct and memorable (e.g., Connecticut Heritage Coalition). Be sure any resulting acronyms are favorable to the coalition (e.g., Georgians for Preservation Action or GaPA). Long coalition names are forgettable and do not help convey the common goal. A current listing of coalition members should be accessible to the public so it can see the broad-based support behind the issue.

**Financing.** If raising and spending money is part of the responsibilities of being a coalition member, have a formal written agreement drawn up stipulating how much money each coalition member must contribute and how it will be spent.



*The renovation of the 240,000 s.f. Washington Mill Building #1 in Lawrence, Massachusetts into residential live/work units would not have been possible without the state rehabilitation tax credit. Thanks to the Massachusetts Preservation Coalition, which secured passage of the tax credit, the renovation of this historic industrial building meant that downtown Lawrence saw its largest single private investment in decades.*

Some coalitions may spend money to hire a lobbying firm or a public relations company, offer educational workshops, or organize advocacy events. Stipulate what to do with any remaining funds at the end of the campaign and what will happen if there are financial shortfalls.

It is not necessary for coalitions to form a separate 501(c)(3) organization. But the coalition should discuss the complexity of the financial arrangements and length of time it will take to address the issue and then decide if forming a 501(c)(3) organization is appropriate. To protect the coalition's interests, be sure to seek legal counsel regarding fundraising and lobbying restrictions.

## Working Together

**Create team-approved educational materials.** To save money, develop general educational materials that explain all of the benefits to each coalition's constituency. With diverse groups involved, the educational materials should have broad appeal. All coalition partners should understand the supporting data and be able to articulate the main message on the issue.

**Host joint events.** To educate elected officials about their issue, coalitions often host events. For example, Georgians for Preservation Action and the Georgia Trust for Historic Preservation host an annual Historic Preservation Day at the State Capitol and a Legislative Reception. These types of events give legislators a chance to hear the reasons for supporting the policy from a variety of perspectives. Elected officials get to see the strength in numbers behind the desired preservation policy. These events also allow the members of the different constituent groups to become more familiar with preservation goals and policies, as well as the players within the state.

**Learn from mistakes and share success.** Another benefit of working with an advocacy coalition is that you can get a variety of feedback to evaluate the success of each tactic. Try to document the group's decisions and any amendments to the agreed-upon strategy. Often adjustments are needed as a strategy unfolds. Documenting these decisions helps ensure



*The Washington Mill project brought over \$40 million of investment and 155 permanent households to a struggling Massachusetts community. Photos courtesy of the Architectural Heritage Foundation.*

that everyone remembers the new strategy and the reasons for the change. With multiple partners offering advice, the coalition can quickly alter its tactics.

In addition to sharing missteps, coalitions also share in the success of their advocacy effort. Tout all successes—whether it's a halfway benchmark or the final achievement. Small successes along the way buoy and encourage coalition members. By sharing credit among all the partners, you ensure goodwill for possible future advocacy coalitions.

**Share information widely about your coalition and its efforts.** From the general public to possible funders, everyone likes to see people working together. Officials enjoy seeing several of their constituent groups coming together to tackle policy issues—it exemplifies broad-based support on particular policy or issue. Coalitions also offer the media several angles to appeal to their readership.

**Engage the media.** One of the most important responsibilities undertaken by the coalition will be engaging the media. With the input of all the members, the coalition will be able to develop a more compelling message that appeals to a wider audience. Ensure that all members of the coalition agree on the advocacy message and use it consistently. Clear the materials released to the public by members of the coalition. Be sure to use the logos of all the organizations involved—create a separate letterhead if necessary. Identify a general spokesperson that can speak to all interests of the coalition members. Provide the media with press releases that describe the policy as being beneficial to a wide range of interests.

## Common Mistakes

Some coalitions work better than others. The coalitions that are successful share a common purpose, are committed to working together, can work out differences in opinion amicably, spend money wisely, and stick to a game plan that is written down and agreed to by all parties. Some coalitions work long enough to achieve their stated goals and can be resurrected if another need arises. When coalitions fail, they fail for a variety of reasons.

Some common pitfalls include failure to meet regularly and making poor choices of partners. Sometimes coalitions do not work because one or more of the members change their minds mid-stream about the goal. They are either unwilling to compromise or they withdraw when the rest of the coalition wants to continue working on the issue. By not being clear in the beginning about the limits each member will or will not accept, the coalition is not as cohesive which endangers the effort to pass or adopt the policy. Other times coalitions fail because they were not able to work out an equitable workload, share the expenses fairly, or one member took credit for the work of the entire coalition.

Often, unsuccessful coalitions fail to put things in writing; there is no plan, no agreement among members, and no joint fact sheet detailing the purposes of the recommended policy.

Coalitions can also get unwieldy when they grow too large. Consider having different partnership “levels” where an organization can simply sign on to show its support but does not share in the strategy-making process.



Even though a coalition agrees upon a common communications message, advocacy materials can still be targeted to reach specific audiences or geographic areas. The Landmark Society of Utica, a member of the Preservation League of New York State's coalition, prepared a fact sheet that describes how expanding the current state rehabilitation tax credit would help renovate the 1928 Stanley Theater. In addition to showing the location of the historic building on a map, the fact sheet also includes the names of the state assemblymen and senator representing the neighborhood where the theater is located. Courtesy of the Landmark Society of Utica.

## Conclusion

Successful advocacy coalitions take hard work, but the results are worth the investment of time and energy. One such coalition, the Preservation Coalition of Massachusetts, sought an economic incentive that would benefit historic buildings within the Commonwealth. In 2003 the coalition conceived, drafted, and successfully lobbied for a state tax credit for the rehabilitation of historic commercial properties. This program, administered by the Massachusetts Historical Commission, has helped renovate theaters in Worcester, hotels in Boston, and new housing stock in Lawrence. Not content to rest on its laurels, the coalition successfully worked with elected officials to raise the program cap from \$10 million to \$50 million in 2006. By creating a similarly effective coalition, advocates can put in place policies and programs that encourage the preservation of our historic communities.

*Renee Viers Kuhlman is the former associate director of Public Policy at the National Trust for Historic Preservation and is currently assisting the Center for State and Local Policy with special projects.*

## Resources and Links

*10 Tips for Working in Coalitions*  
by Peggy Tighe and Michael T. Heaney  
Lobby Search  
<http://www.lobbysearch.com/10tips.htm>

*A Blueprint for Lobbying* by Susan West Montgomery  
National Trust for Historic Preservation  
[www.preservationbooks.org](http://www.preservationbooks.org)

*Building and Maintaining Effective Coalitions*  
by Ellen Feighery, M.S. & Todd Rogers, Ph.D.  
Health Promotion Resource Center  
<http://ttac.tobaccocontrolpartners.org/tcp/pdfs/coalitions.pdf>

**Connecticut Heritage Coalition**  
<http://www.ctculture.org/chdf/>

*Evaluating Your Coalitions*  
Institute for Sustainable Communities  
[http://www.advocacy.org/coalitions/coalition\\_pitfalls.htm](http://www.advocacy.org/coalitions/coalition_pitfalls.htm)

*Getting to Yes: Negotiating Agreement Without Giving In*  
by Roger Fisher and William L. Ury  
[www.amazon.com](http://www.amazon.com)

**Georgians for Preservation Action**  
[http://www.georgiatrust.org/get\\_involved/advocate.htm](http://www.georgiatrust.org/get_involved/advocate.htm)

**Massachusetts Preservation Coalition**  
<http://www.preservationmass.org/coalition.shtml>

*Organizing for Change*  
by Grace Gary  
National Trust for Historic Preservation  
[www.preservationbooks.org](http://www.preservationbooks.org)

*Politics of Historic Districts: A Primer for Grassroots Preservation*  
by William Schmickle  
National Trust for Historic Preservation  
[www.preservationbooks.org](http://www.preservationbooks.org)

*Successful State Advocacy* by Betty Chronic and Barbara Pahl  
National Trust for Historic Preservation  
[www.preservationbooks.org](http://www.preservationbooks.org)

*Working Within the Limits of Coalitions*  
Institute for Sustainable Communities  
<http://www.advocacy.org/enews/archive/05-08-Coalitions4.htm>

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