



# Building a Successful Coalition Conversation Guide

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This resource was created as part of the Harvesting the Wisdom of Coalitions project, which looked at how to support the sustainability of coalitions in Alberta. Following an in-depth literature review and multiple focus groups with coalitions across Alberta, factors were identified that are important to creating and maintaining sustainable coalitions. The factors that were mentioned throughout the Harvesting the Wisdom of Coalitions project as the most important for coalition success and sustainability (in the literature review, focus groups and follow-up research on collaboration and innovation) were included here as individual conversations topics.

This resource has been created to support coalitions in having conversations that will make their coalition stronger and more sustainable. Because we know that coalitions do not develop in a linear way, this is not a step-by-step guide. Coalitions should choose the topic that is the most relevant and important to them and discuss it as a group. Topics include:

- ✓ Leadership (page 5)
- ✓ Recruiting members (page 6)
- ✓ Retaining members (page 7)
- ✓ Diverse membership (page 8)
- ✓ Managing conflict (page 9)
- ✓ Developing and maintaining strong relationships (page 10)
- ✓ Creating and maintaining a strong vision and mission (page 11)
- ✓ Collaborating (page 12)
- ✓ Understanding the big picture (page 13)
- ✓ Understanding community history (page 14)
- ✓ Using evidence (page 15)
- ✓ Resources (page 16)
- ✓ Innovation (page 17)
- ✓ Evaluation (page 18)
- ✓ Managing Risk (page 19)

Each section will give the coalition questions to discuss with the coalition all together. The conversations will help coalitions identify and think about their strengths and challenges. When available, links to additional resources will be included so that coalitions can look deeper into an area of interest.

## Getting Started

Exploring your coalition's strengths and challenges can be really helpful and is most beneficial when the majority of coalition members can participate and contribute. It's important that everyone's point of view is heard. Building a successful and strong coalition is a journey, and having conversations like these are an important part of supporting the growth and development of your coalition.

## Choosing a Facilitator

Having a facilitator guide the process will be important to create a culture of collaboration and shared responsibility. The facilitator's role is to encourage full participation, promote mutual understanding and keep everyone on track. The facilitator can be someone from the coalition or someone from the community. Here are some competencies to consider when choosing a facilitator:

- ✓ **Facilitator:** Someone who can coordinate and lead small groups, creating a cooperative and productive environment in which to resolve problems or develop and implement plans.
- ✓ **Meeting preparation:** Plan and prepare in advance, identifying key issues, goals, and expectations for the group, including perceptions and expectations of stakeholders. Identify resources that are most likely to help the group with its task.
- ✓ **Organize/lead group:** Effectively organize and lead the group in its initial stages, outlining issues, communicating overall direction and desired outcomes, and helping participants understand tasks to be achieved, their roles, and contribution to the process.
- ✓ **Build commitment:** Build commitment and momentum. Communicate appreciation for the work that team members will do. Introduce topics in a way that members are interested and embrace the importance of the process. Use techniques that encourage and engage all members in the discussion.
- ✓ **Lead discussions:** Lead the discussion to achieve appropriate participation from all members. Acknowledge and build on the ideas of highly active contributors, while ensuring that their contributions do not overwhelm or discourage input from others.
- ✓ **Lead complex discussions:** Facilitate discussion of complex problems, employing techniques such as listening and re-stating ideas, to help group members develop insights and remain engaged with the task. Accurately judge when group members are confused or at an impasse in their thinking.

- ✓ **Divisive issues:** Guide the group through difficult or potentially divisive issues. Balance encouragement for input with a recognition of when the discussion is becoming off-track. Skillfully redirect the discussion toward productive channels.
- ✓ **Maintain discussion progress:** Recognize when difficult issues might not be resolved within the group. Appropriately move the discussion away from issues that detract from progress toward essential goals. Continue to lead as appropriate to maintain progress.
- ✓ **Ownership:** Allow ownership of the process by group members. Consistently recognize and highlight group successes. Build a sense of success and shared accomplishment. Reinforce that success by becoming an advocate for the group's decisions.
- ✓ **Group process behavior:** Model effective group process behavior, such as listening, discussing, negotiating, rewarding, encouraging and motivating

## The Conversation

It is important to remember that coalitions do not progress in a straight line but rather go through different stages of a life cycle, in a non-linear way. For example, a coalition may have gone through a great process of developing a strong vision and mission but with the loss of leadership, funding or a change in community needs may have to start over. This is good to keep in mind, because conversations about the same topics will change over time, as the coalition changes. It is important to keep having conversations about these important factors for your coalition's success as membership changes, the vision evolves and as the context you are working in shifts. Because of this, reflecting on where your coalition is in its lifecycle may be a good way to start your conversation. Asking yourselves questions like:

- Q What lifecycle stage is our coalition in? For example, are we still nurturing our growth? Mature? Or wrapping up?
- Q Are different aspects of our coalition at a different lifecycle stage?

We suggest choosing one or two topics that coalition members would like to discuss and to set aside enough time to have in-depth conversations. It is helpful to have a clear goal for having the conversation and an idea of what the coalition is hoping to learn from it. Making sure that the coalition chooses the topic that is the most important to them will help make sure that people are engaged and that the conversations can be useful for your coalition.

All of the questions ask coalitions about what they have or are currently doing but thinking about strategies to use moving forward is also strongly encouraged. Make sure that someone writes down the main points of the conversation so that your coalition can act on what comes out of the conversations.

## After Your Conversation

Having the conversation is a great start but it is also a good idea to brainstorm some strategies to address some of your coalitions' ideas that came up during the conversations.

At the end of your conversations, it is also important to ask some questions to know whether the conversations were helpful to coalition members and to think about how to improve the process in the future.

It is helpful to ask one another:

- Q What have you learned from the conversation today?
- Q What will you do differently moving forward?
- Q What will we, as a coalition, do differently moving forward?

## Having Conversations over Time

Conversations should happen regularly, as the people on your coalition and the context of the community, are constantly changing. If you have already used this toolkit to have a conversation, it is helpful to ask a few questions first, to build off of previous conversations:

- Q What have you done differently since our last conversation?
- Q What have we, as a coalition, done differently since our last conversation?

## Leadership

Leadership is very important to coalitions' long-term success. Research on strong coalition leadership finds that good coalition leaders lead from behind, encourage other coalition members to participate, help to solve problems and conflict, are great communicators and facilitators, and help keep the coalitions' vision and mission at the top of everyone's mind (Wolff, 2001; Butterfoss, 2007; Roussos and Fawcett, 2000).

It is important to remember that when we talk about coalition leadership, it goes beyond the person who technically holds a leadership position. It is important for everyone involved to think about their own leadership qualities and skills.

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### Ice Breaker:

**Q** Think of a leader that has made a difference in your life. What made them a good leader?

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### Exploring Leadership on our Coalition:

- Q** How would we define our leadership structure? Formal or informal? Assigned or shared?
- Q** What characteristics do we value in our coalition leaders?
- Q** How can our leader(s) make sure everyone around the table feel comfortable to participate?
- Q** How can our leader(s) help us trust and respect one another?
- Q** How can we support all coalition members to be great leaders?
- Q** How do we make sure that the survival of our coalition does not depend entirely on our leader?
- Q** How do we engage community leaders as well as leaders of organizations?

## Recruiting Members

Individuals join coalitions for all sorts of reasons. It is important to understand why people might be interested in joining your coalition to encourage them to be involved. Some reasons that people choose to join coalitions include: wanting to be part of a successful group, being passionate about the coalition's goals, thinking that the coalition is doing something important, wanting to know what is happening in the community, and wanting to be part of a powerful group (Butterfoss, 2007). For some people, they are forced to sit on the coalition as part of their job. This may change how that person participates on your coalition (Butterfoss, 2007).

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### Ice Breaker:

**Q** What motivated you to join this coalition?

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### Exploring Membership on our Coalition:

**Q** Why are other people interested in joining our coalition?

**Q** What are some of the things that may be stopping people from joining our coalition? Why have some members left the coalition?

**Example:** Do people know they are invited to join our coalition? Do people feel welcome? Do people have enough time?

**Q** How do we address barriers to participating in our coalition?

**Example:** Have we tried shifting the time and location of our meetings? Do we provide childcare or reimbursement for travel?

**Q** How do we recruit hard-to-reach groups or individuals?

**Example:** Have we personally invited people? Have we tried going where people are already gathering?

**Q** How do we recruit people in a way that matches their interests and needs?

**Q** How do we help potential members feel passionate about our vision and mission?

## Retaining Members

Making sure people want to keep participating on your coalition can be a challenge (Doll et al., 2013). It is important that your members stay engaged, committed and involved for your coalition to be sustainable (Kreuter et al., 2000). Because participating on a coalition can take a lot of time and energy, it is important that members are getting something out of participating on your coalition (Kreuter et al., 2000). For example, people want to be recognized, be respected, feel needed, build relationships with others, and see results in their community (Butterfoss, 2007; Kellogg Foundation, 1997).

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### Ice Breaker:

**Q** What motivates you to stay involved in something?

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### Exploring How We Can Maintain Membership:

**Q** How do we make sure that people are benefitting from their participation on the coalition? Do we provide opportunities for members to learn and grow?

**Q** How do we recognize the 'costs' of participating on the coalition?

**Q** How do we make sure that everyone feels included and able to participate at our coalition meetings?

**Q** How do we ensure we all feel recognized, respected and valued on the coalition?

**Q** How do we include people who can commit in different ways to the coalition?

**Example:** Do we allow our members to participate in different ways? If people can't make our meetings are they still welcome to volunteer at our events?

**Q** How do we balance our short term and long terms goals?

**Q** How do we celebrate all of our successes- big and small?

**Q** How are our members supported by their organizations to participate in our coalition?

## Diverse Membership

It is important for you to include all sorts of different people on your coalition. Including people with different backgrounds and from different organizations has been shown to help coalitions be more sustainable and more willing to think outside of the box. The better your coalition can represent your whole community, the more respected and representative it will be (Community Catalyst, 2003; Kellogg Foundation, 1997). This includes having coalition members from different organizations but also from different populations in your community (for example, ethnic or language groups, gender, age etc).

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### Ice Breaker:

**Q** Can you tell us about the diversity in your life?

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### Exploring Diversity on our Coalition:

**Q** Does our coalition represent the diversity in our community?

**Q** How do we make sure that our coalition represents the diversity of our community?

**Q** Are community members and agencies both represented on our coalition?

**Example:** Does our coalition have people representing different organizations? Do we have people representing different groups in our community (age, ethnic or language group, gender)?

**Q** How does our coalition benefit from working with people from different professional or personal backgrounds?

**Q** What are some of the barriers that people from different backgrounds may face if they are interested in joining our coalition?

**Q** What steps do we take to make sure that our coalition is open to including new members?

## Managing Conflict

Coalitions bring diverse people together. It can be a challenge for coalitions to make sure that all sorts of different people are working together toward the same goal (Doll et al., 2013). When people with different personalities or perspectives come together, it is easy for there to be conflict. Having conflict and tension on your coalition is normal. Managing this conflict and tension is important for the coalition to be successful (Kellogg Foundation, 1997).

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### Ice Breaker:

**Q** What do you personally find the most difficult about managing conflicts?

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### Exploring Conflict Management on our Coalition:

- Q** How do we recognize and work through the conflicts or issues that we have had working together in the past?
- Q** How do we show that participating on the coalition benefits all of the individuals and organizations involved (rather than being threatening or competing with them)?
- Q** How do we make sure that our coalition members who are part of competing organizations can work together?
- Q** What do we do if someone is hurting the success of the coalition?
- Q** How do we support coalition members with conflicting personalities?

**Example:** How do we bring our conversations back to our shared vision? How do we build trust among each other?

## Creating and Maintaining Strong Relationships

Having trusting, strong relationships between your coalition members is one of the most important things for coalition success (Butterfoss, 2007). Strong relationships help people be more willing to work with each other, helps the coalition get through conflict, and makes sure that people feel comfortable sharing new ideas or to honestly give their opinion.

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### Ice Breaker:

**Q** Tell us about one strong professional relationship you have and what makes it so strong.

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### Exploring How our Coalition Builds and Maintains Strong Relationships:

- Q** How do we build trust between our members?
- Q** How do we make sure that people on our coalition get to know each other, personally?
- Q** How do we make sure that everyone on our coalition feels comfortable sharing their opinion?
- Q** How do we make sure that everyone on our coalition feels comfortable expressing a different opinion?
- Q** How have our relationships on the coalition changed how we go about things, both personally and professionally?

**Example:** Do we acknowledge the things that we have in common?

## Creating and Maintaining a Strong Vision and Mission

When you think about your coalition's vision and mission it is important to make sure that they are clear to all of your members and that people feel passionate about them (Doll et al., 2013; Wolff, 2001). Having the same, clear idea of what the coalition is working towards is important for everyone on the coalition to be able to work together and set their personal or organizational agendas aside (Doll et al., 2013; Kellogg Foundation, 1997). It is important that coalitions continue to discuss their vision and mission because as things in the community change, the coalition's vision and mission may change as well (Wolff, 2001).

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### Ice Breaker:

**Q** Can you name one thing that you want for Alberta's young children? (or insert community's name)

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### Exploring our Coalition's Vision and Mission:

**Q** What do you think the vision and mission of our coalition is?

**Q** How do we make sure that we all have a clear understanding of what our coalition is trying to do?

**Example:** Do we have clear short-term and long-term goals?

**Q** How do we make sure that people on our coalition are passionate about our vision and mission?

**Example:** Were our coalition members involved in developing our vision and mission?

**Q** How do we find people who are passionate about our goals?

**Q** Do we regularly think and talk about our goals to make sure that they are still relevant to our coalition and our community?

**Example:** Do our vision and mission still reflect what our community needs? How do we know we are still meeting their needs?

## Collaborating

Being on a coalition is all about working together. As a coalition, you work with coalition members and also with groups outside of the coalition, in your community. Being able to work with one another successfully is therefore very important for coalition's success (Foster-Fishman et.al, 2000). People can work with one another in different ways. Your coalition may cooperate with one group to put on an event or have a deeper partnership with another group, where you share resources and work toward the same goals.

Go around the table: What does the word collaboration mean to you?

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### Ice Breaker:

**Q** Tell us about a time when collaboration worked really well for you.

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### Exploring our Coalition's Ability to Collaborate:

**Q** What are some of the benefits of working with others (either within the coalition or between the coalition and other groups)?

**Q** Who do we need to collaborate with more? Why?

**Q** Do we value the benefits of working with others? Why?

**Q** How does working with others on the coalition make our work more efficient and effective?

**Example:** Has the coalition developed shared goals that help to move all of our work forward?

**Q** When is it appropriate to collaborate? How can we do this?

**Example:** Sometimes it is best to work with others by sharing resources or working together to organize an event. However, collaboration can also be used as a powerful tool to create social change. How can we work together to make changes on a broader scale? For example: How can we align our mission, language, resources and what we measure with other groups?

**Q** How do we empower each other to develop connections both within the coalition and with outside groups?

## Understanding the Big Picture

All coalitions are affected by decisions that are out of their control. For example, political decisions at the local, national, or international level can influence the community context. This may be through a new law or levels of investment related to the coalition's area of interest. Even though this is out of the coalition's hands, it is helpful to think about "big picture" things that may have an impact on the coalition and come up with some strategies to address them.

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### Ice Breaker:

**Q** What are some of the political, social, and economic factors that we should be keeping in mind and considering when we think about early childhood in our community?

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### Exploring the Big Picture:

**Q** How do we actively acknowledge that these factors impact our work?

**Q** How do we take these factors into account when we're trying to understand our success in our community?

**Q** What are some strategies to address the impact of these factors on our work?

**Example:** How does...

- Unemployment
- Our main industry
- Poverty
- Inequality
- Our transportation system
- Our health care system
- Immigration
- Unemployment
- Our main industry
- Poverty
- Inequality
- Our transportation system
- Our health care system
- Immigration
- Government investment
- Politics
- Isolation
- Climate or geography
- Community members' levels of education
- How connected community members feel to one another
- The age of our population

impact our work?

## Understanding Community History

All communities have a history of people working together, trying new things, and a historical context. This history can have an impact on how a coalition is accepted by community and how easy or hard it is to work together (Wolff, 2001). It is important to understand the context of the community you are working in, to move forward in the best way. This history can be directly related to people trying to create a coalition in the past but it can also be related to relationships between individuals or organizations (Doll et al., 2013; Kellogg Foundation, 1997). Talking about history is also important because we can learn from the mistakes of other initiatives and build on their success (Kellogg Foundation, 1997).

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### Ice Breaker:

**Q** Tell us what you like most about living in this community.

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### Exploring our Community History:

- Q** How do the ways we worked together in the past impact how we work together today (either positively or negatively)?
- Q** How have we acknowledged the community's and coalitions members' history of working with one another?
- Q** How can we benefit from our members' history of working together?
- Q** How can we build new or better relationships that haven't existed in the past?
- Q** How have we learned from the challenges of previous initiatives?
- Q** How have we learned from the successes of previous initiatives?

## Using Evidence

Having access to reliable, consistent, evidence-based data has been found to be beneficial for coalitions. Evidence about how well the coalition is functioning can help the coalition get a better understanding of how to better work together and of their success. Data related to the coalition's area of interest can help the coalition show people the importance of the coalition's work and help coalitions respond to their community's needs better.

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### Ice Breaker Question:

**Q** What difference did having EDI data (or any other kind of data) make to our action plan?

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### Exploring the Use of Data by our Coalition:

**Q** How do we make sure that our work is responding to community needs?

**Example:** Have we conducted a survey to understand the needs and wants of our community?

**Q** Do we consistently have access to quality data that provide us with information that we can base our work off of?

**Q** Does our coalition consistently use evidence-based data to help improve our practices and test new ideas?

**Q** How do we know when we have been successful?

**Example:** Do we collect information before and after our coalition's activities to see what has changed as a result?

**Q** How do we know that we are working well as a coalition?

**Example:** Do all of our members feel like they can participate? Do our members represent the diversity in our community? Do all of our members have a clear idea of our coalition's vision and mission?

## Resources

A coalition's funding does not guarantee success or failure; however, coalition members often say how important financial and non-financial resources are to their success. Even though there are many examples of coalitions existing without funding, having the resources to pay someone to dedicate their time to the coalition's work has been found to be a successful strategy for many coalitions. Also, non-financial resources like people's time and expertise are very important for the coalition to work and survive long-term.

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### Ice Breaker:

**Q** What resource do you consider the most valuable to our goals? (Time, energy, money, human capital etc...)

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### Exploring Resources for our Coalition:

- Q** Does our coalition have enough money to achieve its goals?
- Q** Do we have a plan for sustaining ourselves if we lose our funding?
- Q** Does our coalition have enough non-financial resources (ex. skills, expertise, data, community connections) to achieve its goals?
- Q** How can we use our non-financial resources (i.e. skills, expertise, data, community connections) to achieve what we want to accomplish?

**Example:** Questions to consider when applying for new funding

- Does our funder allow for flexibility and experimentation?
- Is applying for a funding opportunity a good use of our limited time and resources? For example, is the amount of time it will take us to apply for this funding worth the amount we are applying for?
- Do the requirements of a grant allow us to stay true to our vision and mission or does it distract us from our original goals?

# Innovation

Trying new things is important in the coalition context for a number of different reasons. First, coalitions are working in continuously changing environments, meaning that they have to respond to new things all of the time. Often solutions that have worked in the past may not work in a new context. Second, coalitions are often dealing with complex problems, meaning that coming up with creative, experimental solutions are often important. Last, innovative, new ideas can create a new passion, energy and excitement among both community and coalition members.

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## Ice Breaker:

**Q** What does the word innovation mean to you?

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## Exploring Innovation on our Coalition:

- Q** Why is it important to try new things?
- Q** Is it always good to try new things? If not, when is it good to try new things?
- Q** Do our coalition's leader(s) encourages the coalitions to be creative and try new things?
- Q** Does our coalition like to experiment?
- Q** It is ok for our coalition to try new things and fail? Why?
- Q** Is our coalition comfortable trying out a new way of doing things even if we are not sure of the exact outcome? Why?
- Q** Does our coalition look for inspiration from what works well in other communities or organizations and strives to adapt these ideas or practices to our own community?

### Defining Innovation:

The development of an idea or practice that is *new* within the *context* it is developed. This development brings about *change* that addresses an *unmet need* or *shifts established solutions* or ways of doing things.

## Evaluation

Evaluating coalitions is important for a number of different reasons. Understanding what is working, what is not working helps coalitions move forward and improve on what they are doing. It is also important to try and understand the impact the coalition is having in their community. However, this is often very challenging for coalitions to do (Herman et al., 2011). Because coalitions are often working on complex issues, it is especially hard for coalitions to isolate their impact. Therefore, on top of trying to understand coalition outcomes, it is important to understand processes that work, and to learn as you go.

**Q** How do we capture the impact that our coalition is having on our community?

**Q** How do we capture how well we are working as a coalition?

**Q** How do we define success?

**Example:** Is our success about shifting outcomes or making people more aware of our issue? Is our success about how we work together as a coalition or our impact on community? Or both? Are the relationships that are built through working together part of our success?

**Q** How do we measure our success?

**Q** What has changed for our members, personally or professionally, as a result of working on the coalition?

### Definitions

**Risk management:** the forecasting and evaluation of financial risks together with the identification of procedures to avoid or minimize their impact.

**Liability:** the state of being responsible for something, especially by law.

**Due diligence:** the care that a reasonable person exercises to avoid harm to

## Managing Risk

As community groups, coalitions sometimes don't think about their own liability or risk that the coalition or individual coalition members may be taking. Even though coalitions are not organizations, you need to think about your liability, risk, and how you are demonstrating due diligence. This conversation may bring up more questions than it answers. It is important that if your coalition does not know the answer to these questions that they contact an insurance broker for more detailed information and advice. At the most basic level, it is important to identify your risks as a coalition and be aware of them.

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### Ice Breaker:

**Q** Do you like to think things through and consider all the options or do you like to jump in full speed ahead and get things done?

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### Exploring Risk Management:

**Q** What types of risks are associated with our coalition's work?

**Q** How are coalition members and volunteers protected in terms of liability?

**Example:** Are we liable if someone gets injured at our events? What if someone claims sexual harassment or wrongful dismissal? How do we protect ourselves against that?

**Q** Do we need insurance?

**Q** Do we have appropriate insurance to protect coalition members?

**Q** How are our coalition members and volunteers protected against risk?

**Example:** If the coalition or an individual volunteering for the coalition is sued, are we protected?

**Q** Can we demonstrate due diligence in managing our risk?

**Example:** Do employers insure all of our coalition members? What about community members sitting on our coalition or volunteers that aren't part of an organization?

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