Coalition Core Competencies Checklist
adapted from Social Innovation for Missouri

This checklist was developed for the Missouri Foundation for Health's Social Innovation for Missouri (SIM) project by Trailnet and American Nonsmokers' Rights Foundation (funded by the Cooperation for National and Community Service's Social Innovation Fund) to help coalitions identify their strengths and growth areas, and has been adapted with their permission.

Directions for use: Check the box next to a key skill area where you or members of your coalition or community group have experience. Note that this document was created to help groups working on tobacco, healthy eating and active living policies. Amend the activities as appropriate to your coalition's focus.

ASSESSMENT AND PLANNING | EXPERIENCE

Assessing the baseline for tobacco issues in your community	
Assessing the baseline for healthy eating issues in your community	
Assessing the baseline for active living issues in your community	
Researching and adapting evidence-based best-practices to a local context	
Setting realistic goals, utilizing SMART objectives, and establishing key benchmarks	
Creating a clear process timeline	
Researching lessons-learned from other states and municipalities	
Establishing partnerships across multiple campaigns when appropriate (e.g., tobacco and built environment)	
Identifying fundraising needs	
Incorporating fundraising strategies throughout your campaign to ensure financial sustainability	

Comments

COALITION BUILDING | EXPERIENCE

Identifying key stakeholders	
Building and maintaining relationships	
Identifying and working with the self-interest of stakeholders and volunteers	
Developing and maintaining a database of supporters (including database platform, content, Freedom of Information Act considerations)	
Attracting nontraditional coalition partners (business, government, etc.)	
Attracting diverse coalition partners (racial, socio-economic, etc.)	
Building a coalition around common vision, goals, and objectives	
Clearly articulating project vision, goals, and objectives	
Developing deal-breakers and obtaining commitment from partners	
Attracting, mobilizing, and sustaining volunteers	
Training and empowering volunteers to assume leadership roles	
Understanding of community-led grassroots methodology	

Comments

FACILITATION   EXPERIENCE

Facilitating the development of collaborative community vision and values	
Leading coalition meetings that are professional, but also encourage creativity and foster excitement	
Establishing a process and framework for group decision-making	
Supporting and facilitating efficient group-decision making	
Building consensus	
Mediating conflict	
Delegating tasks to coalition members and managing the process to ensure tasks are completed	
Knowing when to lead and knowing when to delegate	
Fostering inclusivity of diverse opinions, views, partisans, populations, and beliefs	
Respecting different opinions and ideas	
Enforcing agreed-upon deal-breakers	

Comments

COMMUNICATIONS / SOCIAL MARKETING   EXPERIENCE

Analyzing and articulating the problem	
Ability to quote from documented, reliable sources	
Technical knowledge and skills -- understanding a wide range of communications media (including listservs, print, radio, TV, and social media)	
Educating coalition leaders broadly and deeply on the issues	
Managing internal communications process - communicating with the coalition	
Educating community stakeholders broadly and deeply on the issues	
Managing external communications process - communicating with the public	
Identifying effective messages based on best-practices	
Understand constituent groups and tailor messages appropriately, including cultural competency	
Delivering key messages - public speaking	
Delivering key messages - working with the media	
Identifying and training effective messengers for the campaign	
Estimating the potential impact of target strategies -- such as policies, environmental changes, or programs -- across several criteria (health, economic, etc.) and communicating in clear language	
Understanding and capitalizing on the value of community dialogue, even when it appears to be negative	

Comments

POLICY ADVOCACY   EXPERIENCE

Knowledge of smoke-free and other tobacco policy best-practices

Knowledge of healthy eating policy best-practices

Knowledge of active living policy best-practices

Knowledge of existing local, regional, and state laws

Knowledge of local and regional policy process

Campaign planning and strategy

Understanding of protocol and timing for approaching elected officials

Understanding of preemption as a potential threat to your advocacy work

Identifying your opponents and their weaknesses

Understanding definition of "lobbying" and how it relates to your campaign activities (e.g., what paid organizers can do vs. what volunteers can do)

Communicating with decision-makers and courting champions

Preparing decision-makers for opposition talking points and strategies - neutralizing the opposition's impact

Monitoring and interpreting decision-maker response

Developing campaign benchmarking goals

Responding to advocacy wins and advocacy losses in a manner that continues to build momentum for change

Creating a policy implementation plan and supporting the policy implementation process

Understanding challenges for implementing and enforcing different types of policies and adjusting advocacy strategy\ies accordingly (e.g., more complex policies are more complicated to implement and enforce)

Comments

POLICY IMPLEMENTATION   EXPERIENCE

Budgeting for the implementation process

Developing public education that supports implementation

Supporting enforcement activities

Developing and managing a violation reporting system

Identifying needs and gaps of implementation efforts

Monitoring for legal and other challenges to policies

Comments

Setting event goal(s)	
Planning and managing event logistics	
Recruiting and training event volunteers	
Cultivating new supporters and/or partners through events	
Empowering new messengers through events	
Capitalizing on events for fundraising	
Closing the loop on events -- following-up to build momentum	
Comments	