"Ask the USBC Team": Your Burning Questions on Coalition Operational Effectiveness

“Power Tools for Coalitions” Webinar Series
March 22, 2017

“Power Tools” Background

- Moderator: Kinkini Banerjee, Senior Coalitions Relations Manager, U.S. Breastfeeding Committee
- Series of bi-monthly webinars, part of USBC’s training, technical assistance, and capacity building support for network of state, territorial, tribal, and community breastfeeding coalitions across U.S.
Webinar Access

- Access is open to all interested breastfeeding coalition members
- Topic/speaker details are posted 1-2 weeks before each session on a page on the USBC public website:
  - [www.usbreastfeeding.org/power-tools](http://www.usbreastfeeding.org/power-tools)
- Session details are also posted in the Coalitions Learning Connection (user account required):
  - [www.usbreastfeeding.org/CLC](http://www.usbreastfeeding.org/CLC)

Series Format Update

- To streamline access, these webinars have been set up as a series.
- You only need to register for the series once, and you will then receive auto-reminders of each session with the topic/speaker details.
- Even though you may not be able to attend every session live, the series registration will still send you auto-reminders so that you have easy updates on the topic and links to the live webinar and archives.
Webinar Materials

- To find archives of past sessions:
  - Follow the link from your confirmation or reminder e-mails
  - OR
  - Go to www.usbreastfeeding.org/power-tools

---

Ask the USBC Team: Your Burning Questions on Coalition Operational Effectiveness
Q&A

- During today's session, all attendees will be in listen only mode.

- Questions may be submitted at any time during the webinar. Please type your questions into the Questions box on your webinar control panel.

Webinar Control Panel
Technical Issues

Audio problems? Other questions?
Please e-mail
coalitions@usbreastfeeding.org

Today’s Topic

“Ask the USBC Team”: Your Burning Questions on Coalition Operational Effectiveness
Ask the USBC Team: Your Burning Questions on Coalition Operational Effectiveness

(1) Volunteer Management

How do small (40 members, including 7 board members) volunteer-based state coalitions engage all their members to participate in the activities and get projects done? Our board currently does MUCH of the legwork of the organization. It can be overwhelming and we run the risk of burnout.
(1) Volunteer Management

- Decisions about **WHAT** to do
- Approaches to **HOW** to do it

- But also... **Burnout** is REAL!
  - [10 Tricks to Avoid Nonprofit Burnout](#)
  - [How to Avoid Staff and Volunteer Burnout](#)
  - [6 Ways Nonprofits Can Prevent Volunteer Burnout](#)

### Decisions about **WHAT** to do

- How do you make these decisions to ensure **alignment of active projects to current capacity**?
  - Funded vs unfunded projects
  - Individual passion/pet projects
  - Even when have many volunteer do-ers, still need central coordinator (staff or board)

- Does your coalition have a **strategic plan**?
  - Is it differentiated from your State BF Blueprint?
  - Does it include at least one goal around building your infrastructure/capacity?
  - How often do revisit it? Set shorter-term priorities within it?
Decisions about WHAT to do

- Idea Mapping: For every project idea, consider, “Who Needs to Act?”
  - Individual organizations
  - Group of organizations coalescing together
  - Policymakers

- Then make sure to **align your approach**
  - Are there other organizations that should be engaged?
  - Do they have capacity to share with the effort?

Approaches to HOW to do it

Infrastructure supports from USBC:

- **Coalition Community Workspaces:**
  - Private spaces within USBC website
  - Tools for networking and virtual collaboration
  - USBC provides FREE setup, training & tech support

- **SGCTA Action Directory:**
  - Public-facing resource on USBC website
  - Before embark on a new project, look for examples to build on (avoid wheel reinvention!)
Community Workspaces

- Private online workspace for each state/territorial coalition, as well as a National Native American
- Local coalitions can request a separate local forum (list serv) & file library within their state community
- Equipped with tools such as list servs/discussion forums, blogs, file libraries, roster
SGCTA Directory

- 20 Public Webpages
- Each web page consists of
  - Implementation strategies
  - USBC resources
  - Activities at National, State, and Community levels → populated from your Group Profile

www.usbreastfeeding.org/action-directory

(2) Communications

We want to start publishing a monthly e-newsletter for our constituents (coalition members, supporters, key influencers) on our large listserv. What resources and suggestions could you provide us to start and sustain this ambitious plan?
Getting Started

- Sign up for all relevant state/local newsletters and blogs
  - State/local agencies (Dept of Labor, Dept of Health, etc)
  - Coalition member/partner orgs
  - Local foundations
  - Perinatal Quality Collaborative or other initiatives
- This will provide examples of formatting, design, and length *and* serve as sources of content
- Perfect project for a summer intern
- Borrow freely from the USBC e-Newsletter!

Curating Content

- USBC triage process:
  - USBC staff uses an online form to track news and actions gathered from newsletter subscriptions, social media, media outlets, etc
  - Each week these are sorted and distributed to the most appropriate communication channel (newsletter, social media, topic-specific learning communities, etc.)
Launching Your Newsletter

- Identify what you hope to accomplish with the newsletter
- Decide how the newsletter will be distributed and who the audience is (Coalition members only? Is there a signup process?)
- Identify your newsletter structure

(3) Fundraising

We stretch every coalition dollar to implement programs and activities. As a perennially cash-strapped organization, we would love ideas for fundraising. Also, what are some (legal) considerations we need to keep in mind as we explicitly ask for donations.
Fundraising Resources

- **Power Tools Webinar: Fast and Furious Ideas for Fundraising for the Holidays**
  - Topics addressed: soliciting donations regardless of IRS tax exempt status, fundraising platforms, keys to the ask, and more!
  - Includes templates for: social media memes, direct donation appeal, local foundation outreach

Fundraising Resources

- **Power Tools Webinars: Foundation Center**
  - **Grantseeking Basics**: initial steps to grantseeking, Foundation Center resources you can use
  - **Introduction to Proposal Writing**: overview of standard project proposal to a foundation

Ask the USBC Team: Your Burning Questions on Coalition Operational Effectiveness
(4) Coalition Infrastructure

As our coalition takes on more initiative, and raises its visibility, we are unable to sustain this work on the backs of volunteers along. We would like to explore the possibility of a paid staff position to manage the administration of our coalition. What suggestions and support can you offer?
Grant Language for Provision of Coalition Staff

- First consideration: “Administration of the coalition”
  - Helpful to have paid staff for basic communications
  - But what makes that interesting to a funder?
- Shift focus from individual people doing projects or administrative work, to value proposition:
  - Coalition doing large-scale Policy, Systems & Environmental (PSE) change work
- When focus is on bringing organizations together, then the coalition staff roles carry significant value

Collective Impact Approach

- Benefit to applying Collective Impact approach
- FSG: Understanding the Value of Backbone Organizations in Collective Impact
  - Serve as a communication hub, build public will
  - Guide vision, strategy, activity alignment, shared measurement, policy and resource mobilization
- Organizations coming together in a coalition need an entity to play this backbone role
  - Breastfeeding coalitions that bring together organizations for collaborative work have intrinsic value in their convening and support functions. Pitch that to funders.
Staff Roles in Coalitions

- Several coalitions have written roles and job descriptions, contractor salary ranges, etc:
  - CA, IN, KS, KY, MI, NM and OR...
- Add your coalition to the chat box to let us know if you have experience with this
- Ongoing basis, use the Coalition Discussion forum to share resources with each other

(5) Coalition Structure

- As an MCH staff leader of my state/territory health department, I am the primary person managing the coalition. As our coalition engages larger numbers of stakeholders from across the SGCTA sectors, there are doubts expressed about our coalition’s autonomy and community focus, as members feel a coalition needs a governing body and bylaws, and cannot be administered by a government employee. How do I clear up the concerns of my coalition members?
USBC Coalition Guidelines

Breastfeeding coalitions should meet, or be working towards meeting, the following guidelines:

- Coalition membership & leadership is multisectoral and includes, at a minimum, reps from relevant government departments, non-governmental organizations including consumer (parents) groups, and health professional assns....

- State/territorial coalitions have state/territorial-wide representation and conduct operations or activities of state/territorial-wide scope....

- Coalition has regular meetings that are open to diverse potential stakeholders....

http://www.usbreastfeeding.org/d/do/1751

Coalition Structure Considerations

- Does your coalition want/need to be able to lobby, to be an independent, non-govt voice for legislative/policy change?

- Action 20 of the SGCTA talks about both the federal interagency work group & the USBC—distinct bodies.
  - Title V MCH, Healthy Start, Home Visiting
  - WIC
  - Infant Mortality/Safe Sleep
  - Nutrition/Obesity, Chronic Disease
  - Community Health
  - Labor, Education, Justice, etc.

- Is breastfeeding included in all relevant areas of your state’s public health agenda? Where it is active, are initiatives well-coordinated across programs & funding streams?
If contemplating structure change...

- See first webinar session in the “Power Tools” series: “Navigating Nonprofit Startup”
  - Filing articles of incorporation w/ your state to form a nonprofit
  - Applying for exempt status with IRS
  - Registering with state(s) where you plan to fundraise

- Contact us: coalitions@usbreastfeeding.org

(6) Social Media

Our coalition is interested in improving our visibility by ramping up our social media presence to build a larger network, engage in advocacy and involve the community in support of our mission. What resources and tips on social media could you share to help us get started?
USBC Social Media Webinars

- Twitter 101: Taking Twitter by Storm
  - [https://youtu.be/d8Mofz5JVDE](https://youtu.be/d8Mofz5JVDE)

- Look out for our upcoming Social Media Advocacy webinar for the May Power Tools webinar on May 17

One-on-One

We are launching one-on-one Twitter training and trouble shooting!
- Interactive
- Personalized

We will send an email with information about how to sign-up for a time slot.
(7) Risk Management

Our coalition is concerned that we have not maintained records of our meeting agendas and related documents. How do we reduce the risk to our non-profit and/or tax exempt status?

Risk Management

- Coalition affiliate membership to Non-Profit Risk Management Center
  - At website nonprofitrisk.org
  - Click on the white Affiliate Login
  - Click on the orange Create Your for Account (please allow 24-48 hours for the account to be activated)
  - After 24 hours, enter your email and the temporary password riskmanagement
Risk Management

- RISK eNews
  www.nonprofitrisk.org/library/enews/enews.shtml

- My Risk Management Plan, a cloud app used for creating a custom risk management plan
  www.myriskmanagementplan.org

- My Risk Management Policies, a cloud app used for drafting custom risk management policies
  www.myriskmanagementpolicies.org

- Risk Management Essentials Newsletter
  http://nonprofitrisk.org/library/newsletter/newsletter.shtml

(8) Governing Documents

Our coalition is in process of amending our bylaws and we need help in writing a bylaw relating to giving contributions to various community causes. I feel we need some guidelines to help us with our decision making process.
Governing Document Hierarchy

- Organizational governing documents may not be inconsistent with state law.
- In order of hierarchy, state law prevails, followed by the AoI, bylaws, and any board-approved governance policies or procedures.
- Each document on lower rung must be fully consistent and compliant with those above.
- If not consistent, higher rung prevails.

Articles of Incorp & Bylaws Considerations

- Be sure to thoroughly read your state law section re: what nonprofit AoI and Bylaws must include
- Recommend no more detail than required!!
  - If include extra detail in higher rung, and later want to remove or change, have to amend the higher rung
    - Both AOI & Bylaws amendments typically require vote of full membership
    - For AOI, also must file amendment and pay fees to state
  - Suggest to only put in bylaws the sections required by your state law → do the rest of your governing with Policies!
Policies Considerations

- Can require amendment by board vote or full membership vote
- One approach is to differentiate approval procedure based on content of policy, e.g.:
  - If policy affects board functioning (e.g., budget & financial management, hiring CEO) → have board approve
  - If policy affects membership → have full membership approve or at least seek feedback on new policies or changes to existing policies
  - If policy affects a specific committee → seek feedback from committee’s current members, have board approve

Donations Policies

- USBC has Policy & Procedure for incoming
  - USBC Policy Library publicly available via CLC
- USBC has never had budgeted funds for outgoing donations, so does not have a policy
- **Considerations:**
  - This is an expense decision so it should fall under budget/financial management policy
  - Is donation consistent with mission & values?
  - Is decision process open and transparent?
- Do other coalitions have examples?
(9) Governance/Leadership

Our coalition wants to build a forward looking board with intention - leadership with the capacity to collaborate productively in a multi-sector entity such as ours, and adapt to a networked way of functioning. What suggestions do you have?

Governance/Leadership

- Racial Equity: A Leadership Competency
- Social Change Leader Mindset - SSIR
- Board Source Affiliate Membership
Governance/Leadership

- Growing Our Own Leaders with Intention and Attention. Dr. Ernelyn Navarro and Robbie Gonzalez-Dow, CA BF Coalition
- Fundamentals of Nonprofit Management
  SSIR 6-Part Article Series
- DC, BCW, Kansas, IN, OH BF Coalitions – Use the Coalitions Discussion forums to share and learn with peers. Use Coalitions Directory. Sign up for e-newsletters of other coalitions

Ask USBC Your Burning Q’s

Questions?

Ask the USBC Team: Your Burning Questions on Coalition Operational Effectiveness
Thank you for all you do!

Action 20. Improve national leadership on the promotion and support of breastfeeding.

- Increase the capacity of the USBC and affiliated state coalitions to support breastfeeding.
- Create a federal interagency work group on breastfeeding.