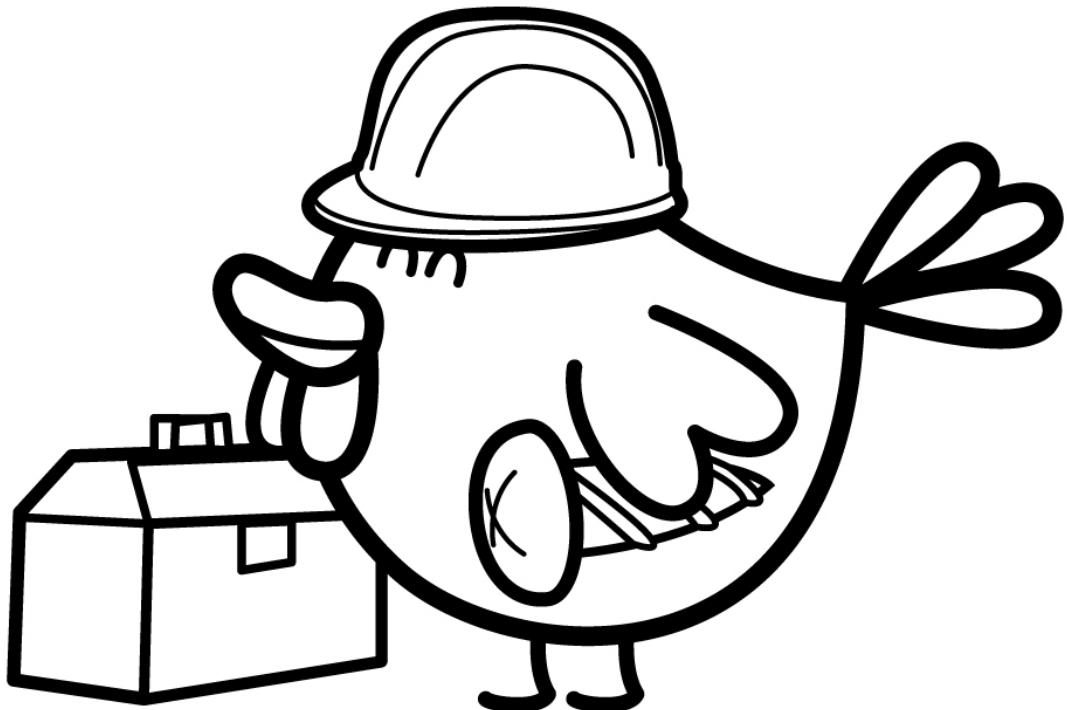


Nuts and Bolts of Building an Alliance



What We're Learning Paper No. 2
Movement Strategy Center, October 2013

For more on movement building, check out <http://letstalkmovementbuilding.org/>

About Nuts and Bolts of Alliance Building

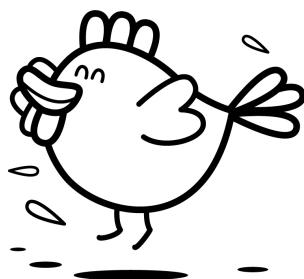
This publication is a pre-release draft of *Nuts and Bolts of Alliance Building*, which will be the second in a series of MSC mini publications called *What We're Learning*. This pre-release draft was developed for a gathering of United Workers Congress. A final report will be released in late fall 2013.

Through the *What We're Learning* papers – each produced in conjunction with a specific movement gathering or action – MSC seeks to name and explore questions and challenges that we are hearing and observing throughout the social justice world. As the title implies, these papers represent “what we’re learning,” offering our words and thoughts to on-going dialogue among partners, allies, and friends we have not yet met. The core contributors to the development of the alliance toolkit were MSC Senior Fellows Jidan Terry-Koon and Kimi Lee with help from Kristen Zimmerman. Drawings from Andrew Baldoza. Thanks to Malkia Cyril, Marianna Viturro, Moira Bowman, Bob Wing and Jonathan Stith for participating in our alliance interviews.

About Movement Strategy Center

MSC is dedicated to transformative movement building: helping individuals, organizations, and alliances build their capacity to be strategic, collaborative, and sustainable. MSC works with over 300 partner grassroots organizations, alliances, and networks that operate at local, regional, and national levels. MSC works across sectors and within sectors. MSC supports local alliances that bring people in one place together across issues and constituencies, and supports national alliances that unite groups working on common issues.

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Nuts and Bolts of Building an Alliance



What's in this toolkit?

1. Culture & Structure: Build Them Together
2. Alliance Vision and Purpose: Is everyone clear on why you are coming together?
3. Alliance Structure Principles
 - a. Don't Get Stuck in the Muck: Common Pitfalls
 - b. Places to start
4. Alliance Culture
 - a. Tools and practices
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5. Structure Model: Anchors
6. Closing: Common Tensions
7. Attachments
 - Movement Pivots, Sample MOU, anchor description, Fundraising agreement
 - Info about Our Healthy Alliance can be found at:
<http://roadmapconsulting.org/whats-new/upcoming-events/107-announcing-our-healthy-alliance>

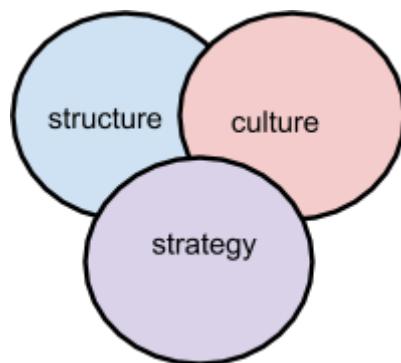
Welcome to the Alliance Toolkit!

Movement Strategies Center (MSC) has been active in building, supporting and developing alliances for over 10 years. We have learned a lot along the way and have created the Movement Building series as a way to share stories, common challenges, and best practices, and to help to facilitate critical conversations about building movements and building alliances. This paper focuses on structure and introduces culture as two key areas of alliance building that follow after your alliance has established its vision and purpose. Often, the question of “which came first, the chicken or egg?” comes up in figuring out how to start an alliance, so we use that metaphor throughout this guide.

Finally, as you read this, please know that the work of alliance-building is being co-created and innovated as we speak. We offer this guide as our contribution to a vibrant and evolving discussion.

Why Culture and Structure?

We have all been part of efforts that fall short of their potential due to lack of structure or too much structure. While alliances come together in order to have collective impact, at some point people also have to answer the question of how the collective functions in order to achieve that impact. How the group functions is determined by a group's culture and structure.



Strategy answers questions like:

1. What is the landscape of forces in our arena and what intervention or action is needed?

2. Who are We? What are our strengths? What are we positioned to and have the capacity to achieve?
3. What are our long and short-term goals?
4. How are we different than other similar efforts? What is our unique offering?
5. Who do we intend to reach and how do we bring them in?

Structure answers questions like:

1. What do we need to be able to do this together? What structure helps us move our purpose?
2. Who makes decisions on what issues within the alliance?
3. Who is engaged and in what functions or activities?
4. How does the effort get staffed? Who are staff accountable to?
5. How does the funding for the effort get generated and managed?
6. How is conflict or concerns surfaced, addressed, and resolved?

Culture answers questions like:

1. In order to achieve greater impact, what's the way of being together do we need?
2. What are the core values of this alliance? How are these developed and embedded within the alliance and between alliance members?
3. How do things get accomplished in practice?
4. What are the tensions that the group is navigating?
5. How does it feel to be part of this alliance? What is the flavor?
6. What is the quality of relationships and TRUST?
7. What implicit and unspoken norms does the alliance operate under?
8. How do people communicate?
9. Are the alliance members accountable to each other?

In this toolkit, we do not focus strategy. We DO address how structure and culture relate to strategy. Resolving questions of strategy remains the primary driver of an alliance effort; the structure and culture questions are resolved in order to develop and support the strategy. You are reading this because you know that without some aspects of structure and culture in place, it is very

difficult for a group to cohere around a shared strategy. Any effort has to address all three areas simultaneously, with different levels of attention based on its unique situation.

"Once you know what the goal of your work is, structure should be built around it. You can't just have lots of structure without following your purpose and you also need real participation and commitment from the group to use it. Structure needs constant support to make it relevant and people need support to follow the structure."

Jonathan Stith, National Coordinator of the Alliance for Educational Justice.

Structure and Culture: Build Them Together

We present culture and structure together in this toolkit because these two aspects of organization are highly interdependent. Structure encompasses the formal mechanisms of the group that are embodied in membership agreements, organizational charts, and job descriptions. Culture encompasses the informal, implicit identity of the group that is embodied in everyday practice, relationships, and ways of being.

Structure often is shaped by the pre-existing culture of a group. For example, if a group has a culture that values grassroots membership, it will likely adopt a structure that requires a grassroots majority.

Structure can also be used to shape or re-shape the culture of a group. For example, an emerging alliance, let's call them XYZ, had not adopted a decision making rule early in its life which led to confusion around what decisions were actually made. This resulted in poor follow up; things didn't move. This is consistent with a general culture in our movement around of lack of clarity around decision-making or hesitancy to make decisions/choices. To shift this culture, XYZ adopted an interim decision making process called Gradients of Agreement to create formal expectations and agreements around how decisions are made. As the group practices and uses the interim decision

making process, it shifts the culture of the group towards more clarity around decision-making.

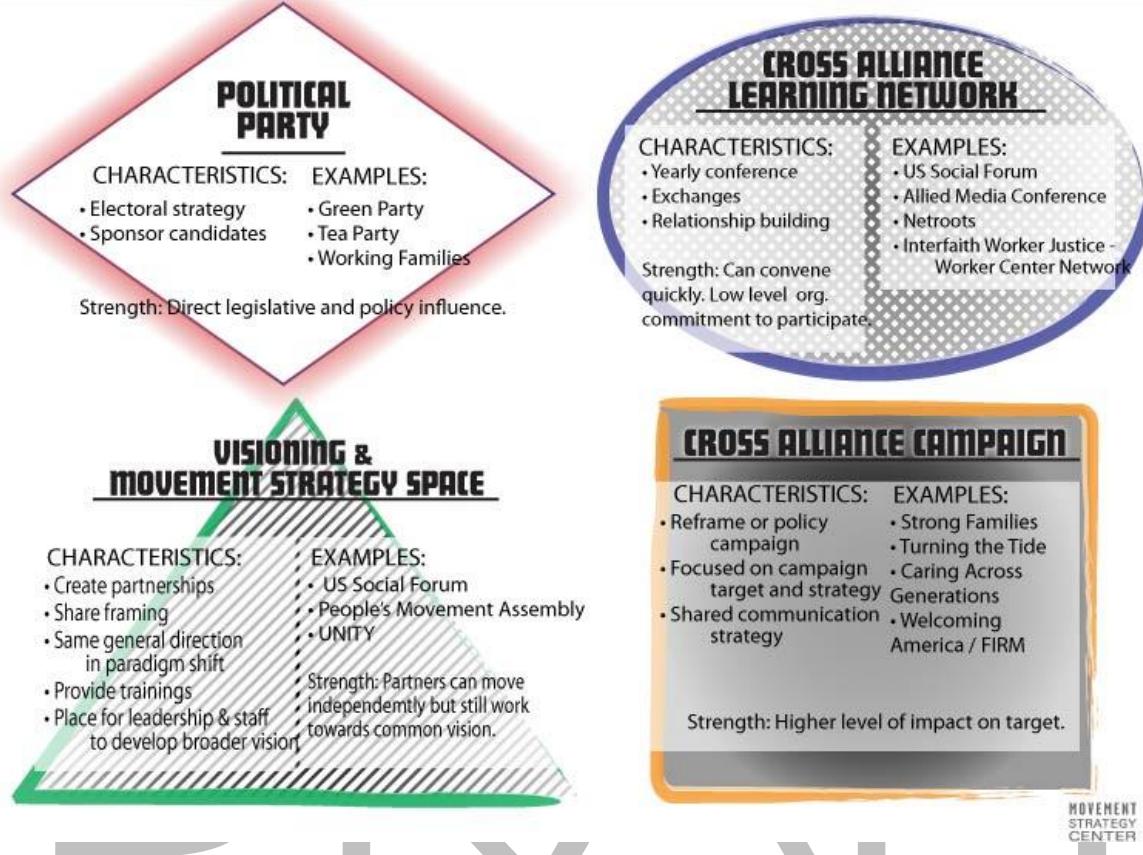
At any point in time, an alliance needs to have shared intention of cultivating its culture and structure to be mutually reinforcing.

Is everyone clear on why the alliance is coming together?

Although alliances might be a hot thing right now, not all initiatives should be alliances. At MSC, we have a particular interest in STRATEGIC alliances. A strategic alliance is a grouping of organizations (some that may be networks or coalitions themselves) that hold a common long-term vision, have a high level of political alignment, and agree to work and strategize together over time. When we say “alliance”, we mean a strategic alliance and not a single issue or short term coalition.

For MSC the overarching purpose of alliance building is to coordinate and align base building groups to influence the national landscape. Over time, the shared vision, the reach of the work and strategy, and the relationships built through an alliance can be the bedrock of movement building in sectors and across sectors. When groups and individuals practice operating in a “We” frame of mind, organizational affiliations and attachments to specific vehicles become secondary to achieving shared goals. Our relationships to each other as people and the shared vision for the world become primary; that is the essence of movement building.

PURPOSES OF ALLIANCES



What kind of work lends itself to an alliance formation?

1. There is a long-term vision and sense of several arcs of work that will be undertaken by the same group of organizations. For example, the meta strategy might rest on several cumulative campaigns that build off of each other [ie: start at local level and build to state and then national, or tackle one issue and then from that win roll into the next related issue]. Although each campaign might be its own initiative that reaches out to different constituencies, the core grouping that is holding the meta-strategy may elect to be a formal, standing alliance.
2. The goals of a strategy are not achievable without the sustained engagement and alignment of a set of organizations.

3. There is a core grouping of organizations with enough self-interest, time, and capacity to be present and engaged in the alliance.

Word of caution: If an alliance is being created primarily due to a funding opportunity, it may be wiser to form a short-term coalition aimed at a specific campaign or short term project rather than attempt to build an alliance.

"In my experience, alliances have to be cautious about what is driving them to form. Many alliances are formed to take advantage of actual or perceived funding opportunities rather than being mission driven. Even if they receive significant funds, such alliances are rarely successful at accomplishing political or organizing goals because that is not foremost in the minds of the partners in the first place. More often than not they dissolve as soon as the funding opportunity dries up." Bob Wing, long time activist, National Co-chair, United for Peace and Justice, 2002-2005, and former staff of Pushback Network which was dissolved after 8 years in 2012.



Emerging – The period between the idea of an alliance gaining traction to several years after the official launch. This period typically includes several “founding” meetings where a vision, purpose/mission, and strategy are hammered out, a resource development plan, staffing up, and first several joint efforts of the alliance. It can easily take 3 years between the idea and the official launch.

Established – A period in an alliance's life when it has accomplished significant work together and members as well as allies have a solid sense of the alliance's purpose, core activities, and processes. At this point, the alliance likely has

adequate staffing. Many alliances adjust their structure to better fit the work. Constant evaluation and reflection are necessary to ensure that the alliance is learning from experiences and evolving as needed. There are many forms of established alliances. [See evaluation tool Our Healthy Alliance by MSC and Roadmap.]

Dissolving – A period in an alliance's life where members either intentionally or unintentionally disband. This can be a very fruitful time of completion if an alliance has truly run its course and outlived its purpose. Just as flowers go to seed, one can harvest the seeds of many other ventures while disbanding. Many groups reach a point where they are involved in too many alliances and the ones that are not relevant get de-prioritized. The energy and momentum of the alliance may be at its end and that's ok. Other times, depending on the reason for disbanding, it can be messy and stressful. Often, after the alliance disbands, a subset of the alliance continues to work together, a part of its work spins off, and/or something else is born. Unfortunately, there are many formations that are adrift, without direction and purpose, and yet cannot make the decision to dissolve.

Alliance Culture & Structure Principles

There is no one size fits all solution to structure and culture. MSC offers the below principles as a guide for how to navigate the specifics of an alliance building situation. These principles relate deeply to the five elements of transformative movement building [See Movement Pivots].



As you read the principles, reflect on:

- What resonates with or excites you?
 - What is unexpected or contrary to either your own approach or common practice?
 - Do these principles open up any new possibility or insight for you? If so, what?
-

Principles

1. Form follows function.

- a. Create structure to best achieve the collective vision, purpose, and strategy of the alliance.
- b. Construct processes to serve forward movement; avoid over-processing or over-input at the cost of timely decisions.
- c. Smaller groups make faster and sharper strategy.

2. Balance energy spent internally and externally.

- a. The ultimate outcomes that alliances strive for are external. Too much time spent on internal processes can lead to not enough energy left for external impact. Too little time spent on internal process (relationship building, structures, etc.) can lead to weak and disjointed external impact.
- b. More executive leadership, levels of approval, and decision-making processes means more time and energy spent coordinating internally.

3. Movement building is about people.

- a. Cultivating a culture of trust and relationship is essential to a well functioning alliance.
- b. Choose members and representatives based upon the individuals involved. Do they embody the qualities one would want to see in the alliance as a whole? While political and demographic considerations are important, real connection with people who are

- able to work out conflict, build trust, and partner well will create a solid core for an alliance.
- c. There needs to be alignment politically and relationally between the key individuals. This does not mean they need to be the same. Rather, they need to have alignment on the ultimate vision of the work as well as ability to hold tension and work through tough issues.
- 4. Build awareness of and action for the Whole (the We).**
- a. See and tap into the unique strengths that each member brings.
 - b. Be transparent about organizational self-interest. Self-interest is not a bad thing; it needs to be put out on the table in order for all to find points of synergy where the group enables the fulfillment of the individual members.
 - c. Since alliances can be big, there should not be a requirement for 100% consensus before acting; rather, seek to provide leadership through action and support those who are ready to move to do so and bring others along. Critical mass.
 - d. Coordinating leadership: It is important for the leadership to see, for the whole of the alliance, with the lens of the “we” instead of through primarily organizational self-interest. While each organization absolutely must be able to satisfy organizational self-interest through membership in the alliance, the job of the leadership is to “tend to the whole”.
- 5. Grounding in base building and frontlines experiences.**
- a. Lifting up and centralizing impacted communities and the organizations that serve them, with an eye towards improving the lives of all, will lead to the most equitable outcomes. Impacted communities have the deepest sense of the true cost of current systems and the most motivation to put in place equitable alternatives.
 - b. While many anchors are national organizations or intermediaries (without its own body of base building work), it is important that key staff come from local base building experience in order to maintain a lens and orientation towards supporting local organizing work.

Don't Get Stuck in the Muck!: Common Pitfalls

In the life of alliances, we have found that there are a handful of places that groups commonly get stuck.

We categorize these common pitfalls under three stages of alliance development: emerging, established, and renewing.



As you read about the common pitfalls, reflect on:

- Have you ever experienced this?
- How did you address it? What worked and what didn't?
- Try on the principles of alliance building offered above. How would you tackle this situation?

DRAFT Common Pitfalls for Emerging Alliances

1. **"Who decides on who's deciding?"** You may be stuck in the chicken or egg dilemma during the birth of an alliance. At this very early stage, it is unclear who has the decision-making authority to actually move the work and make decisions. Who elects the steering committee? Wait, but who gets to decide on the steering committee election process?
2. **"Let's be everything to everybody!"** When an alliance emerges, there is excitement around common vision but the specific purpose or role of the alliance is often fuzzy and broad. In this period, people project their own desires onto the alliance which leads to misconceptions and competing priorities. However, there is often hesitation to sharpen the purpose and role for fear of losing membership or engagement. Rather, groups try to fit in all the desired purposes but then end up with serious disagreements when charting out specific goals and work plans. In the end, the alliance moves in a way that feels like one-step forward, two steps back –

constantly having to deal with fundamentally differing ideas of what the alliance is set up to do.

3. **“What did we say we were doing again?”** Sometimes each meeting feels like re-inventing the wheel. In an emerging alliance, oftentimes the work between meetings to solidify ideas generated or follow through on plans of action do not take place. People come to the next meeting no further along so they get stuck re-hashing the same topics until people begin to disengage.

4. **“Lets set up an advisory board, 17 work groups, and bi-weekly calls!”** Oftentimes the impulse is to build an entire vehicle right after people have decided that there is work to do together. This leads to an over-emphasis on process and structure which takes away from energy spent on clarifying purpose and strategy. It also introduces attachment to structures that may need to be changed in light of the strategy when it is fully developed. Not every initiative should be an alliance. And, for those that end up being alliances, one does not really know the totality of the form that is needed until the purpose and strategy are developed.

5. **“We need to have everyone at the table!”** Some efforts peter out in the process of trying to get everyone represented before starting to move. It is an exception rather than a rule when all the right people are present at the founding of an alliance. Add on top of that demographic, geographical, and other kinds of considerations and one could spend years trying to get the perfect mix.

6. **“Who was supposed to do that? Why didn’t you finish the project?”** When alliances are getting started there are usually lots of ideas suggested and put onto “to-do” lists – with no one assigned to do the work. Or everyone assumes that the one and only alliance staff person will magically catch all the tasks and finish them by the next meeting. Or even worse – the task gets assigned to someone who isn’t there! As more and

more unfinished tasks pile on, frustration and disappointment set in. Tempers may flare as people who do many tasks begin to resent those who don't. Motivation can take a nose-dive.

Some Places to Start



Obviously, alliance building is an art and not formulaic. We offer these “answers” as jumping off points using our alliance building principles to tackle common challenges of emerging alliances. These are not definitive and we hope you have come up with tons of exciting ideas for how to deal with these challenges based on your past experience as well as any new insight that can be gained from our principles.

As you read the “places to start”, reflect on:

- What resonates or feels immediately applicable?
- Are there some simple shifts of perspective or approach that enable new possibilities?
- What new questions does this bring up?

1. “Who decides on who’s deciding?”

Avoid this common pitfall by establishing an interim process with a clear ending point [i.e.: “these 5 organizations will be part of an interim steering committee who’s charge is to convene the alliance to create common vision, purpose, and strategy as well as membership structure over the next 6 months.”] Someone has to step up and get the ball rolling. And, pay special attention to getting input, navigating relationships, and communicating to the larger group in this period.

2. “Let’s be everything to everybody!”

Avoid this common pitfall by normalizing the fact that as the purpose and strategy of the alliance is sharpened, those initially at the table will become re-arranged in the alliance’s universe. For example, start with the idea that the “final” strategy and form of the alliance might not resonate equally with all at the initial table and create an intentional opt-in opportunity when the purpose and strategy are sufficiently finalized. Some who started off very engaged may see that the purpose or strategy of alliance does not be as strongly aligned with their organizational mission as previously thought. They may opt to become supporters rather than core members. Some who were not at the initial table may emerge as natural leaders of the new effort. This re-arranging is not a “falling out” – it is a natural process of organizations positioning themselves in relationship to the alliance’s strategy and their respective organizational interests and strengths.

3. “What did we say we were doing again?”

Avoid this common pitfall by exploring why the work is not happening between meetings. Some common reasons are below:

- Lack of staff time and capacity. The group needs to make a clear eyed assessment about whether there is adequate capacity to take on this new initiative; coming to meeting after meeting is a tremendous waste of time and it would be better to just put the process out of its misery rather than let it die slowly. Plan for how a minimum level of capacity can be generated in the short term to ensure follow through; prioritize the most critical elements to move the process along.
- People are not clear on what has been decided on or have different interpretations about what was decided. Clarify decision making process and summarize outcomes at the end of each meeting.
- People are hesitating on moving forward because there is some fundamental difference that has not been addressed or resolved. There are a lot ways to address this and it will be up to intuition about which will be effective. Sometimes the difference needs to be addressed up front. Set aside time to do that. Other times, people need to get out of an ideological difference and let the debate happen through concrete, pragmatic practice. In this case, see if the group feels it has enough unity

to move forward and trust the process of working together as a means for grounding debates. It's like when people are on their first date and have anxiety about "What if their parents hate me?". They haven't even been invited to meet the parents – let's tackle that bridge when we are actually there.

There are myriad other reasons; uncover and address them.

4. "Let's set up an advisory board, 17 work groups, and bi-weekly calls!"

To avoid this pitfall, refrain from making "final" or more complex decisions on structure until the alliance strategy is fully fleshed out. Rather, lay in as much structure as needed (i.e.: in interim form or skeletal form) until the strategy is fleshed out enough to dictate what kinds of structures are needed.

5. "We need to have everyone at the table!"

Avoid this pitfall by being explicit and agreeing at the outset on the principle of readiness. Whomever is ready at the moment to move together should do so, with appropriate due diligence in engaging key players. By freeing those who are ready to move, they create momentum that can carry and draw others in. It really is a service to the whole, as long as the initial group follows up with real efforts at engaging those who were not or could not be engaged in the beginning. This is part of breaking a movement habit of needing to be the originator of something in order to be invested. We all have limited energy and capacity – if we only engage in things that we start, we will be severely handicapped!

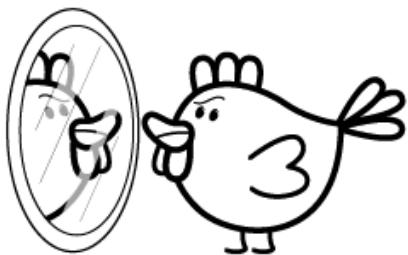
6. "Who was suppose to do that? Why didn't you finish the project?"

Avoid this pitfall by making sure there is a real agreement and decisions made around next steps. At the end of each meeting, list out all the decisions and make sure to assign each task to someone who is present for the meeting and give them a deadline to complete the task. All meeting notes should have a summary of decisions and next steps. At the following meeting, the same list can be used for a report back. It is important to hold each other accountable and also to be clear what you are expecting of each other.

After Your Alliance is Established

In this next phase of alliance development, some common experiences include:

- Original formation leaders transition out.
- New members get thrown into long meetings and the work.
- Most active members start to feel burned out.
- Structure no longer fits with purpose.



Our strongest recommendation for established alliances is to be open to evaluation and having an outside person help your alliance take a step back, look at your original vision and current work and make adjustments as needed. Most alliances will have natural leadership transition and there is always a need to help orient new leaders or new member organizations into the alliance.

Use the orientation process as a way to inventory all the work you have done, document significant campaign and strategy lessons and create shared frame and materials for the alliance.

"When NDWA was started, we had no staff and mainly served as a convening and training space. After we hired Ai-jen as the Director a few years later, we shifted the purpose to run a national programs and campaigns. We then had to also change our membership structure and took time to create a culture in the organization that was committed to leadership development and transformational organizing." Marianna Viturran, Deputy Director NDWA.

Dissolving

Everything in life changes. The alliance that you helped form may not be needed anymore. Maybe you reached your vision (yeah!) or maybe the members are just not invested enough anymore to make it work. That's ok. It's better to decide to dissolve an alliance than keep it alive without a clear purpose or without support from the members. The relationships that were built will help to grow new alliances or campaigns. Document lessons and share experiences with key stakeholders and allies. Celebrate your accomplishments and give your alliance the recognition it deserves for the contributions it made.



Alliance Culture

Build Culture Through Tools and Practices

Culture defines how an alliance functions on a day-to-day basis. No matter what systems are on paper, culture is reflected in what actually happens. Every alliance and every organization has a culture. The core question is whether we



are consciously aware of and developing this culture or unconsciously acting out our habits. If we are consciously building culture we are in a position to be strategic, inspirational and generative. If not, we often become culture victims.

Learning to consciously build and cultivate the culture of your alliance is a key part of developing the strategic capacity of your alliance. The degree to which you can intentionally build a strategic, inspirational and generative culture within your alliance has everything to do with how effective and impactful you will be in changing the world. At Movement Strategy Center we have identified 5 core cultural pivots that the progressive movement needs to make to be more effective. Our Movement Pivots paper explores these more deeply but here we can summarize them as:

- Moving from Isolation to Interdependence through cultivating Broad Awareness
- Moving from a Defensive stance to an Offensive Stance by Leading with Bold Vision and Purpose
- Moving from Marginalization to Stepping into Power by Grounding in People, Community and History
- Moving From Competition to Strategic Direction by cultivating our ability to Align and Move Together
- Moving from Control to Creativity by cultivating Trust and Innovation

But how do you actually do this within an alliance or even an organization for that matter? What are qualities and characteristics we need to embody as an alliance?

The work of culture building and culture shifting can be both simple and complex. For example, in order to build deep relationships and community some alliances

have consciously integrated story-telling and circle work as a core practice. This is both an internal and external practice – internally they use it to deepen their relationships with each other, and their awareness of how their personal experience informs their work together. Externally they use stories, and the values and personal connection cultivated through stories, as part of a communications strategy to advance their campaign goals.

Alliances have used other explicit practices, such as Forward Stance, Generative Somatic, or courageous conversations to do things like develop a strategic stance, access and build resilience and increase their capacity to take risks and have breakthrough conversations. The practices can be as simple as deciding on one thing, like courageous conversations, and practicing it often. Or as deep as deciding to integrate a more formal practice into the weekly and monthly rhythm of the organization.

A few questions to start:

- What is your vision and the impact you want to have in the world? What are the core values at the heart of this change?
 - What are 3-5 qualities or characteristics that if you cultivated them as a group, would fundamentally shift the way you are together? How would this increase your impact? How can you practice that together in an ongoing way?
 - What are 3 – 5 words that would describe the current culture of your alliance? What aspects of the culture do you want to build upon? What aspects would you like to shift?
 - What are tools and practices that have been working well with your alliance? What tools or practices would you like to see your group adopt? What would it take?
-

Relationships and Trust are Critical

A core practice that must be integrated into the development and growth of your alliance is trust building between leadership, staff and members. Even though groups and leaders may have common goals with their campaigns or may have worked with each other at some point, it is important to establish and

continue to build deep personal relationships amongst the key stakeholders. By building trust from the beginning, the group will be able to maneuver through outside attacks on the alliance or during times when quick decisions will need to be made.

In the context of cultivating culture through tools and practices, we would like to lift up INDIVIDUAL RELATIONSHIPS and TRUST as the critical foundation of an alliance's culture. When considering the make-up of an alliance, particularly the core that will determine the trajectory of the alliance in the formation stage, prioritize the qualities below. These are deeply related to our 5 elements of effective movement building and can be considered qualities of effective movement builders at the individual level.

1. Bold vision and purpose

- a. Who has a vision for where this work needs to go?
- b. Who is in a pro-active rather than reactive stance?
- c. Who, in practice, embodies the vision of the alliance?

2. Alignment

- a. Who can work in team with others?
- b. Who has the influence to corral and direct others? Capacity for political leadership?

3. Trust and community

- a. Who has existing credibility and trust?
- b. Who is open to building trust through struggling to resolve personality and/or political conflicts?
- c. Who works well in team?

4. Broad awareness

- a. Who can wear a "we" perspective (see for the whole) and not only an organizational perspective?
- b. Who is not overly attached to one strategy or approach but can see the value of different roles and perspectives?
- c. Who has a good sense of the internal and external landscape of the alliance?

5. Creativity and risk taking

- a. Who is open to or already doing something radically different or pushing the envelop?
- b. Who can suspend judgment in order to let creativity emerge?

In general, these are the qualities of movement builders; they live by and model the transformations we seek to see in the world. Not everyone will meet all the

criteria; the goal is to select people that meet as many as possible as a leadership Team. Of course there are always political considerations in terms of who is invited to be at the table; navigate those with the goal of meeting the above criteria. Paying too much attention to political considerations ("the person has to be there because they have a history with the issue even though no one wants to work with them...") will generally yield a dysfunctional leadership team and that will doom an alliance process. Give your alliance a shot at success by ensuring the leadership team has the right people on it. The culture of the leadership team will reverberate throughout the alliance.

Structure Model: Anchors

What is an Anchor?

In an alliance setting, an **anchor** describes an organization that invests a significant amount of staff time and resources to play an explicit, agreed upon role fulfilling functions crucial to ensure the forward movement and maintenance of the alliance.

Anchors fulfill a number of functions to this end and can take on various configurations to achieve their purpose.

It is important to note that choosing an anchor role has potentially significant implications on the identity of the anchor organization. Through our case studies, we have noticed that once alliances get established and gain traction, the alliance either spins off into its own entity OR the collaborative initiative becomes the primary purpose of the anchor organization. In many cases, the anchor organization becomes the collaborative initiative's infrastructure; the anchor organization significantly shifts or down sizes its own local or other body of work.

Function of Anchors

The five functions below represent the most crucial functions needed for an alliance to build and maintain cohesion as well as momentum.

1. Political leadership, strategic direction
2. Culture holding
3. Staffing

4. Fundraising
5. Fiscal administration

These functions are not carried out solely by the anchors (or else there wouldn't be the need for an alliance!); AND it helps to have a body/organization explicitly responsible for bringing each particular lens. Additionally, anchors are positioned to see the whole of what is needed in a particular moment for the alliance simply because there is more dedicated staff time and attention to fulfill these functions.

Each alliance should figure out its own systems for meaningfully engaging members in the functions listed. Leadership should emerge and be exercised from anywhere within the alliance.

The functions listed below can be fulfilled all within one organization (a singular anchor) or parceled out in different ways to a number of anchors.

Political Leadership, Strategic Direction

An alliance stays vibrant and forward moving when leadership constantly relate issues and decisions to the vision, purpose, and strategy of the alliance. With this rudder to guide the alliance, it can maintain focused on strategic impact rather than get pulled in too many directions by both members as well as outside circumstances.

- Identify and hold the resolution of strategic questions as they arise; engage others.
- Have the off-line conversations needed both within and without the alliance that are needed to assess the landscape, get feedback, build alignment, and move the group forward.
- Create or relate the work plan to serve the strategic direction.

Culture Holding

The culture of an alliance will determine whether it can work through differences and maintain a deeply felt "we" over the long haul. It is the difference between a transactional and transformational alliance.

- Pay attention to cultivation of the culture of the alliance in the form of relationship building, shared practices and norms, setting and meeting of expectations.
- Model and foster trust, collaboration, and true interconnection.
- Part of culture is holding the various processes and practices relating to governance, meaningful engagement of members, surfacing and resolving conflict, dialogue, etc.

Staffing

In addition to the two functions above, most alliances depend on having dedicated staff to implement and coordinate its work. While any staff absolutely brings his/her/per leadership to the staffing position, how much s/he/per plays the above functions will vary from alliance to alliance.¹

- Day to day coordination and implementation of the work plan; ensure all the pieces are working together.
- Embody the values and culture of the alliance through the nuts and bolts operation of the alliance.
- Convene and support the various bodies of the alliance; i.e. the steering committee, the working groups, the anchors.

Fundraising

Anchors can play a key coordinating role for all of the moving pieces related to fundraising, depending on the level of engagement of the staff (ie: Director or Coordinator) in fundraising.

- Coordinating the fundraising strategy, planning, and implementation
- Building external relationships with funders
- Dedicating time of development staff towards the effort

Fiscal Administration

Lastly, alliances often need an administrative host or shell for fundraising and staffing purposes.

¹For example, a staff person playing a large role in strategic direction plus staffing means it is a Director position rather than a Coordinator position.

¹

- Generating paychecks for staff and contractors
- Tracking leave and other HR functions for staff
- Benefits
- Regular (monthly) budget reports; expense to actual, expense to projected
- Regular (monthly) processing of reimbursement requests
- Receiving donations from organizations or individuals
- Receiving grant funding
- Approving (signing) of necessary grant and other administrative documents

“Anchoring a national alliance required us to grow and evolve our local organization. We identified our strengths and kept those at our core as we transitioned our stance toward national as well as local impact.” Moira Bowman, Deputy Director of Forward Together (formerly known as Asian Communities for Reproductive Justice).

Phases of Alliances and Anchors

Emerging. Typically, at the outset of a collaborative effort the founding organizations are heavily involved in governance. Only this kind of hands-on visioning, strategy, and doing of the work lead to the alliance getting dedicated staffing and the resultant boost in capacity. At this phase, organizations often informally anchor the effort and the role of the Steering Committee (or other governing body) is key.

Established. After getting established with staffing in order to push campaigns or other work, the most successful alliances have strong directors and the role of the governing body shifts. In this established phase, many of the anchor functions listed above – particularly the function of strategic direction - become embodied in the staff either in close alignment or relative autonomy from the organization at which they are housed. When this shift does not happen, we find staff that must wait on direction from a dispersed governing body.

Dissolving. After completing the initial collective action that the alliance formed to take, alliances often find themselves adrift; a vehicle without a purpose. This is an opportunity to re-assess the purpose of the alliance, whether it is still needed, and identify new collective work the group can take up.

Resourcing Anchors

Anchor organizations should be able to resource their role within the alliance through several means:

1. Increased organizational fundraising through involvement in the alliance
2. Receiving an anchor stipend or funding through the collective fundraising of the alliance

The amount of the stipend depends on the functions and staff time the anchor is playing. It is important to have a written MOU between the anchor organization and the leadership members. The MOU should cover roles and responsibilities and clearly explain decision-making and budget allocations. [See Sample Anchor MOU]

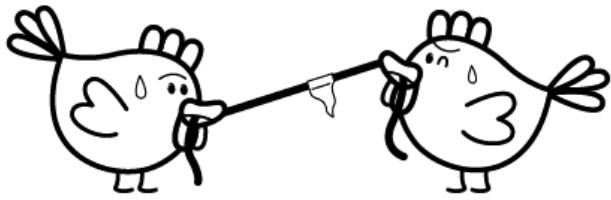
Common pitfalls and tips:

DRAFT

It's easy for an anchor organization to lose its own identity. Executive Directors from the anchor organizations speak on behalf of the alliance and start to spend more time developing and promoting the alliance. National attention is given to the alliance and local organizations often get overlooked. Limited staff time is then split between the two organizations. If the alliance has its own separate staff, they find themselves with a large group of supervisors or no one giving them feedback at all. Some tips are:

- Create detailed MOU's between the anchors and the leadership.
- Staff roles and supervision should be clearly defined and adopted by all leadership.
- Be open to adjustments and experimenting. Evaluation is key!
- Give it a timeline! Some groups start with anchors then shift to other structures.

CLOSING THOUGHTS on Common Tensions



There are several common tensions that groups grapple with as they establish and evolve their structures. These tensions are creative ones and are not meant to be resolved. What is important is that groups name and navigate these tensions as they come up AND that the structure questions are answered in the context of the strategy questions. There can be ideological or political attachment to certain aspects of structure that actually hold groups back from achieving the impact it hopes to achieve. We advocate for an approach to structure and culture that is primarily pragmatic: What structure and culture is going to best achieve the desired outcome?

- Centralized vs. Decentralized**
- Hierarchical vs. Horizontal**
- Quick Decisive Action vs. Democratic Practice**
- Broad Engagement vs. Political History and Unity**
- Executive Leadership vs. Group Ownership**
- Planning vs. Responsiveness**

As you read these common tensions, reflect on:

- Have you experienced these tensions before? Do you have a tendency towards any "side" of the tensions listed?
- What does it take to hold and navigate tension? Where and when have you seen groups do it successfully?
- What tensions are coming up in your alliance? Which ones have been resolved and which ones are persistent or on-going

Everyone feels fear and insecurity with taking leadership and forming alliances. An underlying root cause of these tensions is the hesitancy and mistrust of power. We are used to fighting every day for our issues within systems that put us at odds with everyone around us and we carry a deep distrust of those that hold power. To move forward, we need to practice stepping into leadership. We have to support and follow leadership rather than assume anyone in leadership is an enemy of the people. By shifting our own attitude towards power, we can address these common tensions and build our movement and our alliances together. **Be a courageous chicken!**