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Building Coalitions to Initiate Change

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Abstract: Coalition-building is a process of bringing together a credible group of opinion leaders who represent varying interests on an issue. The purpose of a coalition is to create focused dialogue, find common ground, and work together to advance mutually beneficial agendas. A coalition is designed to create movement by changing the direction an issue is taking or accelerating its progress toward public awareness. The sharing of control by the opinion leaders is the centerpiece of the coalition's credibility. Coalition-building has long been a tactic in managing regulatory and legislative issues. However, its use is expanding to other areas of public relations, as one-sided communications programs are increasingly replaced with relationship-building strategies. There are at least 4 types of coalitions, including those organized because of sensitivity or empathy to a point of view on an emerging issue. Building a coalition involves identifying members, conducting research, organizing meeting design, and developing messages and tactics.

Full Text: San Diego had a problem. Southern California Edison (SCE), the Los Angeles utility, had launched a bid to take over San Diego Gas & Electric Co. SCE was well-heeled financially and politically. It appeared to be a "done deal." Yet the community was up in arms. Business saw another company headquarters leaving town. Labor saw jobs going out the window. Consumer activists saw higher energy rates on the horizon. Environmentalists were concerned about the impact on air quality. Local government officials were concerned about all of the above, plus a loss of tax revenues. These groups joined together to form The San Diego Coalition For Local Control, and walked through an issues management planning process. The coalition launched a three-year campaign, rich in spirit but short on funds. The result? A David and Goliath success story that beat back the SCE takeover attempt funded by \$100 million. The coalition's budget? \$100,000. Coalition-building is a process of bringing together a credible group of opinion leaders representing varying interests on an issue. The purpose is to create focused dialogue, wrestle for common ground and work together to advance mutually beneficial agendas. A coalition is designed to create movement--either changing the direction an issue is taking or accelerating its progress toward public importance. Creating a successful coalition is hard work. Building a coalition requires replacing a costly win-lose mentality among coalition partners with one of "win-win." Mutual benefit is the incentive and common denominator. Mutual benefit also provides an ethical barometer. True mutuality balances the interests of stakeholders and the public good--a responsibility that all involved must embrace. Credibility is the coalition's greatest strength. It's the overriding criterion in selecting participants; the driving force in designing the consensus-building process. Integrity should be maintained at all costs. The planning described here can direct the work of the coalition. In the end, control is in the hands of the opinion leaders who have been assembled. This sharing of control is the centerpiece of credibility. A RELATIONSHIP-BUILDING STRATEGY While coalition-building has long been a tactic in managing regulatory and legislative issues, its use is expanding to other areas of public relations, as one-sided communications programs are increasingly replaced with relationship-building strategies. These strategies require dialogue and harmony among those sharing a stake in the issues confronting organizations and industries. Coalitions offer an opportunity to organize a team of opinion leaders to help build public trust and supportive behavior. There are at least four types of coalitions: 1) Opinion leaders of disparate stakeholder groups, tired of expensive confrontation and in need of creating consensus on an active issue. Example: Expensive California environmental initiatives have some leading agricultural and environmental moderates trying to find mutually beneficial solutions to shared issues rather than continuing to carry on a never-ending series of battles bearing

little fruit. 2) **Opinion leaders representing disparate stakeholders who find themselves on the same side of the fence on an issue or event.** Example: Fresh from its success in opposing the California utility merger, the Greater San Diego Chamber of Commerce is organizing a broad-based coalition composed of community groups in San Diego and Tijuana, Mexico, to facilitate the development of a controversial new bi-national airport to be shared by both cities. 3) **Multidisciplined groups of opinion leaders organized because of their likely sensitivity or empathy to a point of view on an emerging issue.** Example: The Dairy Council of California (DCC), concerned about the wholesale transfer of adult dietary recommendations to children, linked this transfer with a broader trend of rushing kids to adulthood, and ignoring growth and developmental needs. Consequently, DCC broadened its thinking and teamed with the National Dairy Council (NDC) to recruit a coalition of opinion leaders from the fields of early childhood development, elementary school education, children's physical activity and anthropology, as well as pediatric medicine, pediatric dietetics and pediatric eating behavior. These members of the newly formed Coalition For Healthy Children found they shared many common philosophical principles and concerns related to rushing children to adulthood in terms of learning, eating and physical activity. The coalition created messages and tactics. Work continues to advance their findings with professional audiences. 4) **Opinion leaders of stakeholder groups brought together to share a position on an issue that already enjoys widespread acceptance.** Example: The produce industry pooled its funds and organized the Produce for Better Health Foundation to capitalize on the role fruits and vegetables play in cancer prevention. The coalition will support the National Cancer Institute's plans to create a national campaign to encourage Americans to increase their consumption of vegetables and fruits to five servings daily. Membership is composed of opinion leaders from produce promotion groups, grocery retail, food service and health professionals. LINKED TO ISSUES MANAGEMENT Coalition-building should surface, when needed, from a **systematic issues management planning process.** Ideally, a system is in place to **anticipate issues, provide analysis on their impact** on an organization or industry and establish priorities. Steps for managing a priority issue then include developing an organization's position and creating strategies, messages and tactics to advance the position. Coalitions can help build a case for the viability of the position and create their own supportive messages and tactics for creating public acceptance. * DEVELOP A POSITION: Your organization's **position on an issue** should be developed only **after a complete analysis of where the issue is heading**, what's working for and against you, who's driving the issue, what their positions are, and finally, **who else is likely to be affected** or perceive themselves as being affected. Using this information, a position of mutual benefit to your organization and to those it affects can be created. * CREATE STRATEGY: Strategy is the direction an organization takes to pursue its position on an issue. Strategies are usually designed to accomplish one of three outcomes: accelerate an opportunity, redirect a potential threat and/or make internal adjustments to adapt to change. The American Institute of Wine and Food (AIWF) coalition, for example, was driven by a strategy to redirect restrictive interpretations of dietary guidelines (non-fat and low-fat choices only) by broadening the viewpoint of health professionals about food choices to include concerns about taste and physical activity (see box, page 30). The mutual benefit to health professionals? An emphasis on taste, the number one consumer motivation for making food selection, increases their odds for widespread change in public eating habits. This strategy originated in the dairy industry and was tested for viability with key opinion leaders from the health community. The standards created by the AIWF coalition later supported it. While threats are probably the predominant issues faced by issue managers, opportunities can also be anticipated and strengthened. The Produce for Better Health Foundation's putting some muscle behind consuming more vegetables and fruits is one example. A major outcome of any coalition should be the creation of ownership among participants in a common direction for managing an issue. Other expected or hoped-for outcomes should be clearly identified, either before the coalition is formed or at the beginning of discussions. Coalition members must clearly understand and buy into these outcomes. This works best when they have a hand in determining them. Desired outcomes drive the coalition process, put parameters on individual agendas and keep discussion from being diverted to issues on

which members may not agree. The National Dairy Council identified three outcomes before the first meeting of the Coalition for Healthy Children. They were then used to recruit coalition members. They were: 1) Identify common philosophies which cross disciplines in the protection of children. 2) Advance new strategies for protecting childhood with professionals working with children and parents. 3) Create new awareness of the benefits of protecting childhood through professionals working with children and parents.

IDENTIFY COALITION PARTICIPANTS

The identification of **candidates for coalition participation** begins with analyzing stakeholders. Ask questions such as: Which groups are driving the issue? Who else may be affected? What are their known or likely positions? How polarized are the extreme positions? Which are likely to be receptive to our point of view? Who are their opinion leaders? Co-sponsors help attract participants. Criteria for selecting coalition participants can include **credibility with peers and broader audiences, interest in the issue, moderate (vs. extreme) point of view, receptivity to the organizer's position or willingness to seek common ground, ability to work in a group seeking consensus, and availability of avenues to reach out to peers and broader audiences.** While coalitions can be organized with representation from national trade or professional groups, the political "hoops" encountered in getting such groups to be official sponsors can be time consuming. A more efficient route is to ask stakeholder organizations for help in recommending participants. The Coalition for Healthy Children had participants recommended by (and in some cases representing) the American Academy of Pediatrics, the American Dietetic Association and the National Association for the Education of Young Children. While this improved avenues for communicating the findings of the coalition later on, it stopped short of securing the official participation of these organizations. **The first participants recruited are extremely important. If those with the highest degree of credibility are attracted first, others follow more easily.** An alternative is recruiting a "core" working group of participants to drive the coalition. Such a group can quickly confirm the viability of the position being sought, help identify and recruit players, and assist with organizing the working sessions. This gives even more credibility when recruitment calls begin. Identifying the leadership of the constituencies a coalition represents is crucial to advancing its position with stakeholders and evaluating the impact of the process. There are at least two ways of identifying opinion leaders. Formal research of a sample of the coalition member communities to identify those who are most credible on an issue is one way. A cross-nomination process can be used. This is done by locating an adequate number of experts to nominate or recommend other experts. Eventually, a list of cross-nominated names emerge. Alternatively, coalition members or core working group members can be a resource. Ask each to provide a list of those with the most credibility among their constituents. The leaders they suggest can be asked the same question. It is then possible to create a concentric circle of opinion leadership on the issue. There's no need to look for a list of thousands. It's probably closer to a hundred or less.

CONDUCT RESEARCH

Conducting research before and after the coalition project begins will help evaluate the campaign's impact. This doesn't have to be expensive. What needs to be identified is how the universe of opinion leaders is behaving with regard to the issue and the coalition organizer's position, both before the coalition-building project begins and after the leadership network has had time to work. As a member of the AIWF coalition, the National Dairy Board surveyed health professionals to find out whether they were recommending only low-fat products and whether they honored individual taste preferences when meeting dietary recommendations. Chefs were surveyed to find out if they were using only low-fat products to meet dietary recommendations, dropping particular foods or entire food groups out of their menus or moderating the amounts of low-and high-fat foods.

ORGANIZE MEETING DESIGN

While specific outcomes drive each coalition, generally all coalitions seek common ground to manage an issue. Meeting agendas should support these outcomes. Agriculturalists and environmentalists ask: Where do we agree? Where do we disagree? Where can we work together? The Coalition for Healthy Children started with creating a consensus on common philosophical values. It then assessed the inappropriate expectations placed on children, the misperceptions associated with those inappropriate expectations and the messages/tactics needed to redirect the movement with peers and broader audiences. A professional facilitator is critical to planning successful coalition meetings.

Designing and implementing an agenda to best match outcomes requires a leader experienced in group process. Building consensus among disparate points of view is not easy. Group discussion must move along without rushing or taking control of content. Keeping personal agendas and egos from dominating, assuring all participants an opportunity to be heard and reigniting the process when it gets bogged down (as it inevitably will at some point) is the job of the facilitator. Organizing the tremendous volume of data in a practical way, and keeping the greater public good in the discussion are additional roles. Well thought-out logistics, including comfortable facility and room set-up, equipment, and sleeping and eating accommodations, contribute to a positive work environment and support coalition outcomes. Treating participants as royalty pays off in their willingness to work to achieve coalition outcomes. It's desirable to have these opinion leaders--who are important now and in the future--leave the working sessions thinking, "Wow, these folks really know how to run a meeting." DEVELOP MESSAGES AND TACTICS Once a coalition has found common ground--be it agreement on a statement of vision, common values, or definition of the problem or situation--the next step is to create messages to advance the coalition's platform (vs. the organizer's own organizational position). The findings of the coalition are far more credible when the coalition and its members are out in front on an issue. Once messages are established, discussion turns to tactics. Tactical discussions provide another opportunity for enhancing ownership in the findings of the coalition. Each coalition member, a leader in his/her own right, has intimate knowledge of ways to cut through the clutter and reach out to peers. Each also has entree for advancing coalition messages with peers and their constituencies, such as professional societies and publications. In focusing on opinion leaders in this process, it's important to make advancing coalition messages to peers before broader audiences the priority. Coalition members often underestimate the influence of peers, and discussion frequently moves directly to mass media tactics. While this discussion is important, peers and their constituencies must remain the top priority. While the behind-the-scenes work is the glue holding coalitions together, there is considerable momentum independent of that support. Opinion leaders take their new commitment on an issue back to their own jobs and areas of influence. They frequently team up with other coalition members on their own and the movement begins to take on a life of its own. This movement is a powerful process which capitalizes on the influence of opinion leaders to build public trust and supportive behavior. Kerry Tucker is president, Nuffer Smith, Tucker Inc., an issue management and public relations firm specializing in coalition building. NST is the San Diego, CA, affiliate of the WORLDCOM Group. Sharon Long McNerney is director of issue management, Dairy Council of California, Sacramento. COALITION ALLIES HEALTH AND CULINARY TRENDSETTERS The Dairy Council of California teamed with the National Dairy Board and the American Institute of Wine and Food to form a coalition to redirect the issue that those setting health policy were becoming increasingly dogmatic about recommending only non-fat or low-fat products in a healthful diet, and ignoring individual taste preferences. The Dairy Council's trends tracking force spotted the issue and tracked it as it began to pick up speed. Its public relations team analyzed the implications to the organization, created DCC's position on the issue and developed strategy, messages and tactics to advance its position. The dairy industry's position on the trend toward more restrictive food choices is that all foods--including all dairy foods--can fit in a healthful diet and still meet accepted dietary guidelines. Forming a coalition surfaced as a tactic. DCC approached the American Institute of Wine and Food (AIWF), a professional culinary society founded by noted chef Julia Child. AIWF shared DCC's concern that taste--the number one motivation for making food selections--was taking a backseat in public discussions about health. AIWF was asked to pull together the leading health professionals shaping dietary recommendations and the culinary trendsetters who set the stage for innovative food preparation. The National Dairy Board was also approached. While coalition members were recruited on their receptivity to DCC's point of view, they also began their work together by developing a common set of philosophical principles. The dairy industry position was included as a plank in that philosophical platform. The scene was set for a series of lively and sometimes heated working sessions with 50 of the country's foremost opinion leaders of the "formerly warring camps." From the debates, consensus

emerged on a set of joint standards which treats health and taste as equal partners. The national coalition is now organizing regional coalitions to give an expanded universe of opinion leaders the opportunity to provide input (and with it ownership) into the process, primarily through discussions about what their findings did and did not do, and how they can best be implemented. Other tactics include personalized direct mail from coalition members, peer group presentations, regional coalition speaking teams, publicity in peer periodicals and mass media publicity.

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