ADVOCACY TOOLKIT:
Working with an Advocacy Coalition

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By Renee Kuhlman, Senior Director of Outreach and Support at the National Trust for Historic Preservation.

The National Trust for Historic Preservation and Main Street America advocate for effective policies for historic preservation and community revitalization through training, technical assistance, and promotion of effective advocacy tools. The Advocacy Toolkit, including this chapter, was initially published through the generous support of the Jessie Ball duPont Fund. To connect with the National Trust for Historic Preservation, visit savingplaces.org or email forum@savingplaces.org. To connect with Main Street America, visit mainstreet.org or email mainstreet@savingplaces.org.
Introduction

Working with a coalition of advocates can greatly increase the chance of getting a preservation or revitalization policy successfully adopted or passed by a governmental body. Coalitions can also have a positive impact when organized for defensive reasons (e.g., protecting a historic site or maintaining funding for a state-wide Main Street program). Identifying partners who can be of assistance and working with them in an equitable and responsible manner can increase the coalition’s stature in the eyes of elected officials as well as the public they serve.

What is an Advocacy Coalition?

Coalitions formed for advocacy purposes generally consist of individuals, businesses, associations, and nonprofit groups. Representatives of government agencies can also participate by providing data or information that can be used by the coalitions. Many times, coalitions are formed to address a single policy issue, although in some instances, coalitions seek to address a range of issues and develop a joint policy agenda. Whether they are permanent or formed for a temporary purpose, all effective coalitions share a common trait — they are action-oriented and work toward achieving a specific goal.

Benefits of Working with a Coalition

Coalitions offer several benefits. The old adage, “many hands make light work,” is true. With additional resources focused on achieving the preservation policy objective, you can now share the burden of planning events, working with the media, and educating the public, officials, and grassroots constituencies. Likewise, sharing costs for activities such as hiring a lobbyist or hosting events will be lower for each coalition member than if a single organization had undertaken an advocacy campaign on its own.

In addition to pooling financial and human resources, coalitions also offer the opportunity to increase credibility for your public policy purpose. Coalitions demonstrate a broad base of support to officials and help create a compelling message that reaches a larger audience. Working in coalitions offers members the opportunity to make new contacts and learn new techniques from other organizations. It also will help increase awareness of preservation and community revitalization concerns among the partners.

Successful coalition-driven policy changes include the passage, protection, and amending of state rehabilitation tax credit programs. For example, recognizing the impact of historic tax credit programs in neighboring states, the Revitalize West Virginia’s Downtowns Coalition worked to increase the West Virginia historic rehabilitation tax credit from ten percent to twenty-five percent. Begun with just four organizations represented, the coalition grew to include 38 cities and their mayors, county executives, brownfield activists, business owners, local Main Streets, developers and the National Trust for Historic Preservation. While an initial attempt stalled in the legislative process, continued advocacy by the coalition proved essential, and the increase passed in early 2018.

Other examples of public policy issues that could benefit from the efforts of a coalition include promoting amendments to a state affordable housing allocation process to encourage more creation of affordable units in historic buildings and increasing...
appropriations funding for Main Street coordinating programs and State Historic Preservation Offices.

How to Get Started

Before creating or joining a coalition to work on a public policy issue, consider all of the ramifications. Talk through objectives in advance with potential partners to avoid misunderstandings among members during the advocacy campaign. The first meeting of the coalition provides an opportunity to discuss the proposed policy, reasons for becoming involved, and plans for reaching the policy goal.

The following suggestions will help you create an effective advocacy coalition.

Identify possible coalition partners and evaluate their potential. Not surprisingly, the interdisciplinary nature of preservation and Main Street revitalization means you have allies in many different fields. Consider approaching other types of organizations, in addition to the typical preservation partners such as architects, developers, and planners, when planning a coalition. For example, landscape architects, historical societies, chambers of commerce, housing advocates, and
environmentalists often share common interests and goals. For example, reuse of historic buildings means less waste in landfills and that outcome is a shared goal with environmentalists.

The list of potential partners depends on each situation and may change over time, so brainstorm new partnership opportunities periodically. You might partner with a group during a specific legislative campaign and then find yourself partnering in the future with someone who took the opposite side in the previous campaign. Although there will always be someone or some groups opposed to your issue, remember that you might find them as allies down the road. Be careful not to burn bridges, even if there are disagreements.

Before approaching possible coalition members, consider the following questions:

- Would the potential partners benefit from participating in this advocacy campaign? If so, describe the benefits in a way that would appeal to their interest using familiar terminology. Preservation in and of itself is not always an obvious benefit that attracts a coalition partner. Often, you might find that preservation benefits a partner in another way. For example, revitalization of downtown commercial districts attracts many concerned about development of entrepreneurial ecosystems, the protection of outdoor recreation assets, and creation of high-wage local jobs to retain the local workforce.

- What's the reputation of the possible coalition partner? Are you comfortable to be associated with the potential partner in the media?

- Building successful working coalitions takes time and may come at the expense of other programs. Potential partners should understand the expected time commitment.

- What does the partner bring to the table? Does the partner have supporters who will become engaged in an advocacy campaign? In what manner and how often does the partner communicate with its advocates? Does the partner have different or better connections with elected officials? Does it have a reputation within the policy arena for being effective? Does it have additional financial resources or access to other resources?

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**Coalition Partners**

Common partners in preservation and Main Street coalitions include:

- Statewide and local preservation organizations
- Local Main Street organizations
- Housing advocates
- Business / property owners
- Community and neighborhood organizations
- Tourism Associations / Convention & Visitors Bureaus
- Educational institutions
- Historic sites
- Chambers of Commerce
- State historic preservation office / Main Street coordinators
- Local elected officials
- Real estate/economic development professionals
- Architects and planners
- Environmentalists
- Religious Institutions
- Cultural/Affinity Interest groups
- Smart growth organizations
- Other organizations that have allied goals
Agree on how to approach potential partners. After considering all the possible partners and evaluating their ability to contribute to your advocacy effort, decide how to approach the partner you have identified. In some instances, you can easily accomplish this with a phone call to the person in charge. Often, however, board-level approval is needed before an organization can commit to joining an advocacy coalition. State your reasons for being involved and outline the reasons why you think the change would also help the partner reach its goals.

Write it down. Although logistics may seem insignificant in the beginning, the best coalitions put things in writing. Jointly develop a written document that identifies the common campaign goals shared by all the coalition members, defines the strategic action steps, clearly identifies the responsibilities and expectations of coalition members, and establishes a schedule or timeline. Having the goal and action plan in writing will help potential coalition members understand the expected duration of the working relationship and will address potential areas of conflict and get them resolved before the campaign starts to avoid misunderstandings down the road.

Hold regular meetings. Agree to meet regularly, and when possible face-to-face. Keep notes of meetings and who is responsible for follow-up on assigned tasks. Determine who has the best contacts and skills and divvy up the tasks accordingly. Thank coalition members for their work often and in a timely manner.

Create a coalition name. The name of the coalition should be succinct and memorable (e.g., Connecticut Places Coalition). Be sure any resulting acronyms are favorable to the coalition (e.g., Georgians for Preservation Action or GaPA). Long coalition names are forgettable and do not help convey the common goal. A current listing of coalition members should be accessible to the public so it can see the broad-based support behind the issue.

Financing. If raising and spending money is part of the responsibilities of being a coalition member, have a formal written agreement drawn up stipulating how much money each coalition member must contribute and how it will be spent. Some coalitions may spend money to hire a lobbying firm or a public relations company, offer educational workshops, or organize advocacy events. Stipulate what to do with any remaining funds
at the end of the campaign and what will happen if there are financial shortfalls.

It is not necessary for coalitions to form a separate 501(c) 3 organization. But the coalition should discuss the complexity of the financial arrangements and length of time it will take to address the issue and then decide if forming a 501(c) 3 organization is appropriate. To protect the coalition’s interests, be sure to seek legal counsel regarding fund-raising and lobbying restrictions.

**Working Together**

Create team-approved educational materials. To save money, develop general educational materials that explain all of the benefits to each coalition’s constituency. With diverse groups involved, the educational materials should have broad appeal. To increase the coalition’s chance of success, understand the issue and its consequences thoroughly. All coalition partners should understand the supporting data and be able to articulate the main message on the issue.

**Host joint events.** To educate elected officials about their issue, coalitions often host events. For example, Missouri Main Street Connection Inc, hosts an annual Main Street Capitol Day in Jefferson City to celebrate the achievements of participating communities and to share insights about the program’s impact with state legislators. These types of events give legislators a chance to hear the reasons for supporting the policy from a variety of perspectives. The elected officials get to see the strength in numbers behind the desired preservation policy. These events also allow the members of the different constituent groups to become more familiar with revitalization goals and policies, as well as their supporters within the state.

**Learn from mistakes and share success.** Another benefit of working with an advocacy coalition is that you can get a variety of feedback to evaluate the success of each tactic. With multiple partners offering advice, the
coalition can quickly alter its tactics. In addition to sharing missteps, coalitions also share in the success of their advocacy effort. Tout all successes—whether it’s a halfway benchmark or the final achievement. Small successes along the way buoy and encourage coalition members. By sharing credit among all the partners, you ensure goodwill for possible future advocacy coalitions.

Share information widely about your coalition and its efforts. From the general public to possible funders, everyone likes to see people working together. Officials enjoy seeing several of their constituent groups coming together to tackle policy issues—it exemplifies broad-based support on particular policy or issue. Coalitions offer the media several avenues to appeal to their readership.

Engage the media. One of the most important responsibilities undertaken by the coalition will be engaging the media. With the input of all the members, the coalition will be able to develop a more compelling message that appeals to a wider audience. Ensure that all members of the coalition agree on the advocacy message and use it consistently. Clear the materials released to the public by all the members of the coalition. Be sure to use the logos of all the organizations involved—create a separate letterhead if necessary. Identify a general spokesperson that can speak to all interests of the coalition members. Provide the media with press releases that describe the policy as being beneficial to a wide range of interests.

Common Mistakes

Some coalitions work better than others. The coalitions that are successful share a common purpose, are committed to working together, can work out differences in opinion amicably, spend money wisely, and stick to a game plan that is written down and agreed to by all parties. Some coalitions work long enough to achieve their stated goals and can be resurrected if another need arises. When coalitions fail, they fail for a variety of reasons.

Some common pitfalls include failure to meet regularly and making poor choices of partners. Sometimes, coalitions do not work because one or more of the members change their minds mid-stream about the goal. They are either unwilling to compromise or withdraw when the rest of the coalition wants to continue working on the issue. By not being clear in the beginning about the limits each member will or will not accept, the coalition is not as cohesive and endangers the effort to pass or adopt the policy. Other times coalitions fail because they were not able to work out an equitable workload, share the expenses fairly, or one member took credit for the work of the entire coalition.

Often, unsuccessful coalitions fail to put things in writing; there is no plan, no agreement among members, and no joint fact sheet detailing the purposes of the recommended policy. Try to document the group’s decisions and any amendments to the agreed-upon strategy. Often adjustments are needed as a strategy unfolds. Documenting these decisions helps ensure that everyone remembers the new strategy and the reasons for the change.

Coalitions can also get unwieldy when they grow too large. Consider having different partnership “levels” where an organization can simply sign on to show its support but does not share in the strategy-making process.
Conclusion

Successful advocacy coalitions take hard work, but the results are worth the investment of time and energy. One such coalition, Iowa’s Smart Growth Development, formed to promote preservation and smart growth practices, including state historic tax credits. With a diverse composition including developers, Main Streets, architects and preservationists, the coalition successfully raised the cap on the state historic tax credit in 2009 and continues to advocate for improvements. To help educate lawmakers, the group commissioned a report on the effectiveness of historic tax credits both locally and across the country. By creating a similarly effective coalition, advocates can put in place policies and programs that encourage the revitalization of our historic communities.

Glossary

**Advocacy** - the act or process of pleading in favor of or supporting a cause or proposal

**Coalition** – a temporary alliance of distinct parties or persons for joint action

**Legislative Advocacy** – the act or process of pleading in favor of a specific public policy

Resources and Organizations

*A Blueprint for Lobbying* by Susan West
Montgomery, National Trust for Historic Preservation

*Advocacy Resource: Coalition Checklist*, Bolder Advocacy

*Coalition Work Tools*
CoalitionsWork


**Connecticut Places Coalition**

**Georgians for Preservation Action**

**Iowa Smart Growth Development**

**Missouri Main Street Connection**

**New Mexico Coalition of Main Street Communities**

**Preservation Alliance of West Virginia**
Main Street America has been helping revitalize older and historic commercial districts for 40 years. Today it is a network of more than 1,600 neighborhoods and communities, rural and urban, who share both a commitment to place and to building stronger communities through preservation-based economic development. Main Street America is a program of the nonprofit National Main Street Center, Inc., a subsidiary of the National Trust for Historic Preservation.