



Center for Social Development

GEORGE WARREN BROWN SCHOOL OF SOCIAL WORK

Asset-Building Coalitions in States

Innovative Coalition Development and Policy Advocacy Strategies Meeting

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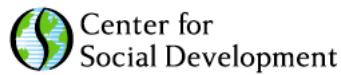
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Asset-Building Coalitions in States: Innovative Coalition Development and Policy Advocacy Strategies

The Center for Social Development (CSD) at Washington University in St. Louis, in collaboration with CFED and Institute on Assets and Social Policy (IASP) at Brandeis University, hosted the first national strategy meeting for all state asset-building coalitions on June 10-11, 2008 in St. Louis, Missouri. The meeting, titled “*Asset-Building Coalitions in States: Innovative Coalition Development and Policy Advocacy Strategies*,” was supported by the Annie E. Casey Foundation. Close to 70 representatives of state-level asset-building coalitions from 29 states attended this strategy-building meeting.

The host organizations offered this meeting because of a perceived need in the asset-building field for increased collaboration and communication between emerging and active state-level asset-building coalitions. CSD’s policy report, *The Relevance of Asset-building Policy Coalitions in the United States*, written by Karen Edwards, synthesized current knowledge regarding state-level asset-building coalitions. Prior to the meeting, the host organizations created a survey to gather more information regarding coalition development, structure, function, and policy focus. Twenty-three of the 28 coalitions attending the meeting completed the survey, providing the field with a more in-depth look at how these coalitions formed, how they are advocating and implementing policy goals, and what resources they need to function effectively. Host organizations plan to use this survey information, in addition to information gained from meeting discussions and post-conference evaluations, to develop resources for state asset-building coalitions that will help them to collaborate and meet state asset policy goals.

This strategy meeting was the first national meeting to invite representatives from all known state asset-building coalitions (numbering over thirty by some counts). The meeting had three purposes: 1) to provide opportunities for identified assets coalitions to share achievements and challenges; 2) to inform these coalitions about available resources and successful tactics currently being used in other states; and 3) to help the coalitions develop strategies to move their work forward. This document provides a summary of meeting presentations and small group discussions around the current and potential effectiveness of state asset-building coalitions.

Asset-Building Coalitions in States

Alabama
Arkansas
Arizona
California
Connecticut
District of Columbia
Florida
Hawaii
Illinois
Kansas
Kentucky
Maryland
Massachusetts
Michigan
Minnesota
Missouri
Montana
Nebraska
New Mexico
New York
North Carolina
North Dakota
Oklahoma Native Assets
Coalition
Oregon
South Carolina
South Dakota
Texas
Utah
Washington

Coalitions Attending the Meeting: A Brief Glance

Information obtained from the pre-conference survey provided an overview of the structure, function, and focus of the current state-level asset-building coalitions. A majority (83%) of the coalitions represented at the meeting consider themselves to be state-level asset-building coalitions. Of these coalitions, 92% meet regularly, and 61% of the coalitions have developed a structure they consider to be “somewhat structured” or

“very structured.” In addition, 45% of the coalitions have determined a state assets policy agenda, and 83% of the coalitions have advocated for state assets policy change.

Many coalitions (78%) receive funding for staff from three primary funding streams: private foundations (42%), government (26%), and financial institutions (16%). The coalitions’ highest priority functions include policy advocacy (31%), communications and/or marketing (19%), information sharing/training (13%), public education (6%), and other (31%). The majority of coalitions (86 %) have networked with other state-level asset-building coalitions to achieve policy goals, and 73% of coalitions have worked with asset-building intermediaries or consultants.

CSD will publish a more detailed brief summarizing the information gathered in the pre- and post-meeting state-level asset-building coalition surveys in the coming months and will post it on the CSD website.

Session I: Effective Assets Coalition-building Strategies

The first panel presentation of the meeting offered representatives from three state asset-building coalitions that are currently at varying stages of development: 1) Anna Knight, Oklahoma Native Assets Coalition (ONAC); 2) Michael Milner, Alabama Asset-Building Coalition; and 3) Woody Widrow, RAISE Texas. The presenters shared important coalition developments, objectives, or goals accomplished to date, and explained how these successes were accomplished and how they faced certain challenges to their work.

Anna Knight, Native Assets Coalition in Oklahoma (ONAC)

The Oklahoma Native Assets Coalition, or ONAC, is a grassroots coalition started in 2006 with support from First Nations Development Institute (FNDI), of Longmont, Colorado. FNDI has been supporting the establishment of asset-building coalitions in key states (states with large Native American populations) for several years. ONAC membership includes representatives from several of the thirty-nine American Indian tribes in Oklahoma, who meet quarterly to highlight external partnerships and resources and share information about asset building and IDAs in Native communities. Major coalition developments include an annual conference attended by both native and non-native groups to discuss partnerships, outside resources, and moving the coalition forward. Coalition successes were made possible by working closely with a number of asset-building tribal entities, and particularly through finding some tribal leaders to facilitate the efforts, including leading and planning meeting agendas. ONAC has also led the effort in the state to establish a larger “mainstream” asset-building coalition (to increase collaboration between tribal and non-tribal asset-building entities and have greater influence on policymakers), which is currently in development.

Michael Milner – Alabama Asset-Building Coalition

The Alabama Asset-Building Coalition was established in 2005 by a group of non-profits, banks, the Federal Reserve of Atlanta, and the United Way of Birmingham. The coalition meets quarterly and speaks monthly by phone. Coalition accomplishments included securing early funding via local funders and non-profits, as well as opening 111 accounts to date. These successes were products of the work of paid staff members and Americorps volunteers, courtesy of the United Way, who canvassed the state, informing agencies and constituents about the state IDA program.

Woody Widrow – RAISE Texas

RAISE Texas was originally established as the Texas IDA Network in 2002. The coalition changed names in 2005 to the Texas IDA Coalition, and again in 2007 to RAISE Texas. During its six-year existence, the coalition has hosted multiple statewide conferences (“summits”) with increasing attendance, which enabled the coalition to expand its scope to include multiple asset-building topics. RAISE Texas is currently investigating becoming a 501(c)3 in order to maintain statewide motivation.

Discussion

The panel was followed by an audience question and answer session. A focal question that was raised is how coalitions can measure movement building. While some aspects of coalition work (i.e. savings in IDA accounts) are measurable, other aspects are not, which can make it difficult for coalitions to monitor progress. Some attendees mentioned the value of determining relevant and measurable short-term, mid-term, and long-term goals for asset-building coalitions. Coalitions could use these benchmarks for planning purposes, to chart progress, and for introducing and influencing state assets policy. CFED mentioned that they are currently working on developing these types of measures related to asset building.

Session II: Developing and Advocating for a Comprehensive Assets Policy Agenda

The second panel presentation featured representatives from three coalitions engaged in a facilitated discussion regarding how state coalitions set their policy agendas, and the strategies they use to advocate for policies. Panel members included Bob Agres of Ho'o`waiwai Asset Policy Initiative of Hawaii, Gina Guillemette of the Illinois Asset Building Group (IABG), and Paul Knox of the Washington Asset-Building Coalition. Panel members discussed the following information: 1) Coalition formation; 2) The process by which asset-building coalitions select policy agendas; and 3) Identifying specific coalition policy successes or failures and the resulting lessons learned.

Bob Agres – Ho'o`waiwai Asset Policy Initiative of Hawaii

Ho'o`waiwai Asset Policy Initiative of Hawaii was initially created by activists who wanted to stop certain kinds of development in the state, then shifted its focus to economic development. In 1998, Ho'o`waiwai changed its framework to asset building and started two IDA collaboratives. The collaborative and related policies were not creating the type of systemic change desired by WaiWai, so they investigated potential changes in framework and funding mechanisms. Ho'o`waiwai chose to focus on the importance of family in Hawaiian culture as an impetus to coalition and policy work. Ho'o`waiwai found that large, loose affiliated networks have driven changes in asset policy in Hawaii.

In creating a policy agenda, Ho'o`waiwai followed the mantra “know yourself, your context, and your tools.” In Hawaii, family is a major cultural focus, thus asset policy needed to be family centered. Ho'o`waiwai came to understand its context and available tools by networking with other state coalitions and national intermediaries who had experience with assets coalition work. Ho'o`waiwai used the information in conjunction with information about their constituents and Hawaii's political climate to choose the appropriate strategies and tools to create a potential policy agenda for the state.

Asset policy victories in Hawaii include splitting tax refunds, obtaining funds for VITA sites, and the creation of a state Financial Education and Asset-Building Task Force. Ho'o`waiwai has learned several lessons during their journey to recent asset policy success. A key lesson is that capacity building and finding “champions” in the legislature can increase support of proposed assets policies. Additionally, having local funders who are politically connected can increase the likelihood of legislative support.

Gina Guillemette - Illinois Asset Building Group (IABG)

The Illinois Asset Building Group began as a funder-convened group in 2003, with assets policy and systems change being an early focus. In 2005, IABG decided that public education was necessary because people didn't understand the term *asset building*. IABG chose to shift directions and build a movement behind a singular asset-building issue.

To choose a single issue to focus on as the coalition's policy agenda, the IABG used funding to contract nonprofit organizations to hold meetings and listening circles throughout the state to tap the needs of constituents. A list of eight potential ideas was created from this series of meetings, and Children's Savings Accounts was the policy idea that most closely matched the constituents' interests. The IABG believed that

involving constituents in the coalition's agenda setting would make policy victories more meaningful, and could make a favorable impression on legislators.

A recent policy success of the IABG was the passage of a bill to create a workgroup to develop children's savings accounts in Illinois. This workgroup will include both government and non-profit entities. The IABG chose to pursue the route of creating a task force due to some foreseen political challenges: 1) Legislators and constituents didn't understand asset-building; and 2) Illinois was in a budget crisis that would dissuade legislators from supporting a \$180 million children's savings account plan. The IABG predicts that having a task force will create a favorable political climate for the future passage of Children's Savings Account through opportunities for public education and building a broad base of support.

Paul Knox - Washington Asset-Building Coalition

The Washington Asset-Building Coalition (WABC) is a statewide asset-building coalition created in 2006. Over 50 organizations are involved and helped gain \$2.8 million from the Washington Legislature for 2007-09.

WABC held a summit in 2006 that brought together 140 public and private leaders from across the state. Information gathered from this summit was used in WABC's creation of a policy agenda. Currently, Coalition Work Teams are working to advance four policy goals: 1) Create a range of private and public prosperity products for asset building; 2) Develop and promote public and lending policies for asset building; 3) Market savings, smart borrowing, and benefits like the EITC; and 4) Expand financial literacy opportunities and outcomes across the state.

In 2008, WABC had policy success when the Governor signed legislation creating the Washington Working Families Credit – a state earned income tax credit. WABC credits the success to strong legislative champions that supported the bill. Legislative support was enhanced by coalition members' policy advocacy as well as funders' provision of asset-building training to legislators.

Discussion

The coalition case studies provided by the panel prompted a good discussion among meeting attendees. Some of the key questions raised in discussion included:

1. *What over-arching messages resonate the most with legislators and constituents?*

Panelists suggested using a variety of different messaging that is specifically targeted to the various populations to whom you are advocating assets policy. This might include highlighting various components of asset-building (economic development, microenterprise, effects on people with low-to moderate-incomes, etc.) to the appropriate stakeholders in the field.

2. *Is it helpful for coalitions to hire a private lobbying/public relations firm?*

The panelists commented that this can be a difficult decision depending on coalition goals and the logistics of lobbying. Legislators can sometimes be dissuaded by contract lobbyists, but contract lobbyists also already have lobbying skills that coalition members would need to acquire. If possible, using both contract lobbyists and coalition members/advocates to lobby can be helpful because various people can carry the message and impact different legislators.

Session III: Resources Currently Available to All Assets Coalitions

During the third panel presentation, representatives from each of the three collaborating host organizations, all national research and policy intermediaries in the asset-building field, shared information about resources that their organizations currently provide to state asset-building coalitions.

Center for Social Development

The Center for Social Development (CSD) focuses on social development research that informs how low- to moderate-income individuals, families, and communities increase capacity, formulate, and reach life goals, and contribute to the economy and society.

The Center for Social Development is a research and policy center at Washington University in St. Louis.

Through the State Assets Policy Project (SAPP), CSD has used a variety of strategies to assist states to create asset-building coalitions. CSD has provided indirect and direct assistance to more than twelve state coalitions, including technical assistance, informing policy agendas, giving expert testimony on state assets policies, and hosting state assets policy conferences and meetings. CSD has employed innovative strategies in helping states and regions meet their needs for asset-building coalitions. In Missouri and Kansas, a bi-state approach was used to create MOKANSave; and in the Southern Black Belt region, CSD assisted in the creation of the Southern Black Belt States Asset-Building Coalition. For more information about CSD's state assets policy projects, please go to <http://gwbweb.wustl.edu/csd/policy/projects.htm>.

In addition to direct consultation services, CSD also offers state asset-building policy coalitions with policy, program, and research regarding CSD's numerous asset-building projects. These resources include state assets policy reports and briefs, which can be found at http://gwbweb.wustl.edu/csd/policy/pol_pubs.htm. A more extensive database of policy, program, and conference publications can be found at <http://gwbweb.wustl.edu/csd/Publications/index.htm>. CSD maintains a web-based state assets policy information center. To access state-by-state assets policy pages, go to http://gwbweb.wustl.edu/csd/policy/states_comp.htm.

CSD directs an international assets program, *Global Assets Project (GAP)*, that supports Children's Development Account (CDA) and Individual Development Account (IDA) research projects in 10 countries. CSD is a principle researcher of a CDA demonstration project titled, *Saving for Education, Entrepreneurship, and Downpayment (SEED) Policy, Practice, and Research Initiative*. Additionally, CSD leads initiatives for civic engagement and service, asset building in Indian country, and child savings and college savings (529) plans. Most recently, CSD, the Brown School, and Washington University partnered with a local housing agency, Beyond Housing, to implement a local community-based economic development initiative.

CFED

CFED's special expertise is to connect public policy, private markets, and community practice to bring effective approaches for building wealth and financial security to scale at the local, state, and national levels. CFED produces the Assets Opportunities Scorecard, which is a tool that assesses how well states support residents' efforts to build and protect assets. It has 84 measures (38 policy, 46 outcome) organized in five categories: financial security, homeownership, education, health care, and business development. State asset-building coalitions could use this resource to help them identify potential policy directions. To access the Scorecard, as well as state pages, policy briefs, resource guides, and an at-a-glance policy chart, please go to www.cfed.org/go/scorecard.

CFED is a national intermediary organization headquartered in Washington DC.

CFED's Saving for Education, Entrepreneurship, and Downpayment (SEED) Policy, Practice, and Research Initiative includes state policy partners in five states who are working to develop state policies that create or expand progressive savings opportunities for children. State asset-building coalitions wanting to pursue children's savings account (CSA) policy in their states can use a variety of resources found at www.cfed.org/go/SEEDpolicyresources. These resources include a guide to crafting CSA legislation, a CSA state policy sourcebook, and occasional CSA state policy white papers.

CFED's federal policy advocacy resources can be used by state asset-building coalitions to encourage support of federal assets policy or to create similar state assets policies. Policy updates and assets reports can be found at www.cfed.org/go/advocacy.

Institute on Assets and Social Policy (IASP)

The Institute on Assets and Social Policy is dedicated to promoting a better understanding of how assets and asset-building opportunities improve the well-being and financial stability of individuals and families left out of the economic mainstream. IASP spearheads the Massachusetts Asset Policy Initiative (MAPI), a three-year project to build the infrastructure for a long-term, collaborative initiative to move a comprehensive asset policy agenda in the state. State asset-building coalitions could use this project as a resource of ideas for policy or program efforts in their states. For more information about the program, as well as publications regarding state and city asset-building initiatives please go to <http://iasp.brandeis.edu/research/state-asset.html>.

The Institute on Assets and Social Policy is a research institute at the Heller School for Social Policy and Management at Brandeis University.

IASP has also teamed up with Massachusetts Association for Community Action, Inc. (MASSCAP) to expand asset formation opportunities for low-income families across Massachusetts. The MASSCAP Asset Formation Initiative's strategy is to expand free tax preparation assistance, financial literacy education, and other asset formation services for low-income people through its statewide network of community action agencies and other partners. State asset-building coalitions who are pursuing similar goals, or who would like more information about partnering with non-profits in their states, can find more information about the programs, projects, and related publications at their website <http://iasp.brandeis.edu/research/community-agencies.html>.

New America Foundation

The New America Foundation is a nonprofit, nonpartisan public policy institute that invests in new thinkers and new ideas to address the next generation of challenges facing the United States. The purpose of New America's Asset-Building program is to significantly broaden savings and assets ownership in America. New America's asset-building program in California could provide other state asset-building coalitions with ideas for potential policy strategies and agendas. For more detailed information about the Asset-building program in California, please go to: http://www.newamerica.net/programs/asset_building/california_asset_building#.

The New America Foundation is a public policy institute headquartered in Washington DC.

Many other national organizations are advocating for asset-building initiatives and policies. For a more complete listing of these organizations, please refer to the resources section of CSD's policy report, *The Relevance of Asset-building Policy Coalitions in the United States*, which is included as an addendum to this report.

Session IV: Building and Sustaining an Assets Coalition

During the small group discussion session that initiated the second half of the meeting, meeting participants were split into two discussion groups: active coalitions and emerging coalitions. These two sub-groups were seated at tables of approximately eight people and given two or three discussion questions that they could discuss at their own pace.

Active Coalitions

1. *How do we create/establish a unified message in support of our asset-building policy agenda that will engage and inspire the majority of constituents and policy leaders in our state? How do we achieve consensus on, and active support of, this message by coalition members (before we begin to spread the message to government and the broader state population)?*

Meeting participants discussed the importance of clearly defining a coalition's constituency. Clear definitions can lead to more effectively engaging clients in coalition work through carefully-crafted messages, and more easily identifying potential policy advocates.

Once constituents are defined, coalition representatives outlined two other objectives that must be met: 1) Determining how to effectively include constituents in the process; and 2) Deciding who (e.g. constituents, coalition members, service providers) can most effectively reach legislators. Coalition representatives discussed that they find it challenging to encourage constituents receiving social services and benefitting from asset-building projects to be involved with coalition work. One coalition suggested paying these constituents to attend meetings, testify at hearings, and participate in other policy work. Many meeting attendees agreed that asset-building program participants' perspectives about wealth, assets, and beneficial resources are key in determining and forwarding an assets policy agenda.

Active Coalitions are those groups that have one or more of the following components: meets regularly, has an established governance structure, and is working towards establishing a policy initiative/strategy.

Another challenge is finding effective and appropriate policy advocates. Coalition representatives acknowledged that the characteristics of a successful policy advocate can vary widely depending on the political climate in a state. Much legwork is needed to identify potential legislative supporters, and the type of people that can push them to become legislative champions.

2. *How do we better identify and maximize resources that both members and supporters bring to, and provide for, coalition efforts?*

Participants remarked that one of the strengths of coalitions is that they unite different agencies throughout the state that can provide unique services to constituents. Carefully identifying the potential resources provided by each coalition member and supporter could be the first step toward more effectively using the resources. Another suggestion involved identifying specific funding resources in the state and enhancing the use of those funders in coalition efforts.

3. *How do we create a larger assets policy constituency in our state? What populations are under-represented by our current membership? How do we reach out to diverse populations (if we don't know how – who does, and how do we approach them for assistance?). What types of impacts or influences might a broader group of members have on our policy and work agenda?*

Attendees suggested that a larger assets policy constituency could be created by defining *diversity* in ways beyond the basic understanding of diversity. Each state coalition needs to evaluate the types of diversity present in their state, and then brainstorm about ways to reach out to the various populations. Partnerships with constituent groups can help with identifying and understanding the range of diversity in a state.

Populations currently underserved by some state asset-building coalitions include Latinos, immigrant groups, persons with disabilities, and domestic violence survivors. Meeting participants stressed that coalitions must

understand the underserved constituents before they can craft effective strategies for including them. Additionally, some coalition representatives believe that coalitions have not been speaking to these groups in an effective way, and better listening may facilitate better outcomes. Attendees suggested that foundations could provide resources and best practices for including underserved populations, and that faith-based communities could be used to mobilize some of the underrepresented groups.

Emerging Coalitions

1. *How do we determine realistic coalition goals and objectives for our coalitions? (What goals and objectives would a majority of coalition member support?) What are the “pay offs” for our member organizations (for-profit, non-profit, and government members) for both belonging to our asset-building coalition and serving its goals? What kinds of commitment and actions do we expect coalition members to contribute towards achieving the coalition’s goals?*

Meeting participants asserted that a necessary precursor to determining realistic coalition goals is clearly defining the unique needs of the coalition’s constituency. A constituency may have a broad spectrum of needs (i.e. urban vs. rural), and if the coalition is knowledgeable about these needs, then it can more effectively engage appropriate member organizations in the coalition. When the constituency’s needs are understood, and the appropriate member organizations are included, then the coalition can brainstorm realistic goals that meet the constituent’s needs.

Emerging Coalitions are those groups that have begun meeting and leadership is established, but no ongoing meeting schedule or policy strategy has been determined.

Coalition member organizations receive numerous “pay offs” from being involved in coalition efforts. One benefit is the investment they make in their staff in terms of training and financial education. Another perk is the positive testimony that community members make when coalition projects succeed, raising support for their organizations. A macro-benefit that affects all coalition members and constituents is increased economic stability for the region.

2. *What source or sources of funding can we tap into to secure 2-5 years of funding for both coalition building and coalition activities (funds for staff, meeting expenses, educational meetings, conferences, marketing/communication, etc.)? What is the best case to make with potential funders to secure these monies? How can national/state/local intermediaries help us to make this case?*

Meeting attendees had a variety of suggestions for potential funding sources. These ideas included mortgage companies, TANF funds, discretionary funds, financial institutions, living wage groups, and the IRS. Recommended strategies consisted of fundraising outside of grants/foundations, ensuring the stability of funding streams, and using funding sources that align with the coalition’s mission and values.

To motivate funders to support coalition activities, coalition representatives recommended showing funders how asset building is compatible with their agendas and missions. Also, involving funders in some decision-making regarding how the money will be spent can motivate involvement.

3. *How do we determine the best leadership and decision-making structure for our coalition? For both short-term and long-term coalition goals and activities? Is our initial leadership structure able to serve our goals and objectives in the long term?*

Participants recommended that all coalition members be involved in selecting the decision-making structure. In an open discussion, coalition members should be asked for input, with all viewpoints (including silence) considered.

Several potential decision-making structures were suggested by meeting attendees. One model that could be used is *modified consensus*. In this model, committee members who vote “no” on an issue become a part of a team that develops a negotiated agreement, and presents it to the larger group for a vote. The modified-consensus model can maintain involvement and ownership among coalition members because members cannot walk away from the discussion—a modified consensus must be made by the group.

Another suggested decision-making model involves creating a steering committee in which committee members passionate about a certain issue can participate. This committee does not make decisions, just recommendations on particular issues, which they present to the larger coalition for decision-making.

Session V: Moving Forward

The last discussion session of the conference was designed to allow conference attendees to inform national intermediaries of the needs of state coalitions. During a facilitated discussion, coalition representatives outlined three overarching needs: 1) Valuable information and lessons from other coalitions; 2) Venues for continued learning among state coalitions, and the sharing of the aforementioned information; and 3) Better coordination and presentation of resources for state coalitions provided by national intermediaries.

Recommended Strategies to Advance State Coalitions

- Information sharing among coalitions
- Annual conferences and meetings
- More support and information from National Intermediaries

Shared Information between State Coalitions

Meeting attendees felt that sharing state assets policy agendas and strategies could serve as a valuable tool. Specific policy analyses and supportive documents could illustrate what issues a state coalition pursued and why, as well as whether or not their efforts were successful. Additionally, coalition representatives wanted to share techniques for finding and creating policy alliances. Shared research regarding state assets policy best practices was also suggested.

Fundraising was mentioned as another area for shared learning. Many coalitions are seeking additional funds, and were particularly interested in the community and national groups that other coalitions have successfully targeted for funds.

Effectively using messaging and collateral to increase coalition and policy support and funding was a shared area of interest. Attendees were interested in sharing lessons about successful messaging rather than reinventing the wheel. It was suggested that the national intermediaries could spearhead an effort to create a document outlining successful messages and framing used by state coalitions.

Annual Meetings for Continued Learning between State Coalitions

Many attendees expressed that an annual face-to-face convening, similar in size to the convened this year could be useful for networking and creating relationships between coalitions; though much more unstructured networking time is desired by meeting participants.

A variety of ideas for Internet-based resources emerged during the discussion. These include:

- Comprehensive database resembling “Ask Jeeves” for the asset field
- “Who are the experts” site with publications, research, and contact information for a variety of state assets topics
- Listing of partners (e.g., non-profits, financial institutions, large national employers) and how they are helping
- Webinars on specific topics in a monthly series where people can be honest, address questions, and find answers

Resources for State Coalitions Provided by National Intermediaries

Meeting attendees would like the national intermediaries to provide clarity regarding which organization is the most appropriate to deal with certain state assets coalition topics. The national intermediaries commented that clearly defined topic areas cannot be outlined for the various intermediaries. They recommended that the state coalitions collaborate with the intermediaries with whom they feel the most comfortable.

Participants also suggested that the intermediaries should play a role in getting information about state coalitions out to other types of partners. The partners mentioned by coalition representatives include CAP agencies, FDIC, the Federal Reserve, Rural Electric Cooperatives, Community College Networks, National League of Cities, and the National Council of Mayors. Meeting attendees suggested that the intermediaries commit to identifying the annual meetings for these partners during the next calendar year so that state assets policy coalition representatives can create panels to present at the meetings.

Post-Meeting Feedback

The host organizations intended for the strategy meeting to be a venue in which state-level asset-building coalitions could share ideas, learn from other coalitions and asset-building intermediaries, and develop strategies to move coalition work forward. Information obtained from post-meeting evaluations completed by 33 conference participants revealed that:

- *97% of survey respondents* had an opportunity to network with representatives from other asset-building coalitions and asset-building intermediaries or consultants
- *79% of survey respondents* learned coalition-building strategies that they thought they could use in their coalitions including funding, advocacy, development, inclusiveness, and public policy strategies
- *86% of survey respondents* have a better idea of the resources their coalition needs to grow and thrive, such as access to research and policy agendas, networking with other coalitions, a broader range of partners, funding sources, strategic planning, best practice information, and outreach ideas

This data encourages the host organizations that the stated goals for the strategy meeting were effectively met through meeting presentations and discussion. It is the hope of the host organizations that state-level asset-building coalitions will continue collaborating with one another to enhance the achievement of state assets policy goals. To assist in the collaboration process, CSD has included three addendum items:

1. A meeting participant list with contact information
2. CSD's policy brief, *The Relevance of Asset-building Policy Coalitions in the United States*, by Karen Edwards
3. Case studies for the state coalitions in North Carolina and Oregon

The host organizations plan to use information and discussion obtained from the strategy meeting to work towards the development of further learning opportunities and resources for state-level asset-building coalitions.

Conclusion

Collaboration is a key reality for producing positive change to improve the lives of low- to moderate-income families. As a key reality, inclusive asset-building coalitions are needed to promote a positive process of participation through which people, groups, and organizations work together on common goals to achieve desired outcomes. Coalition members serve as powerful advocates for developing and expanding opportunities for families. Statewide collaborative initiatives are the ideal place to develop state asset policy agendas. As confirmed through the productive feedback and discussion at this meeting, states that have developed statewide collaborative partnerships and coalitions are more successful in their policy efforts directed at families that need the most help. Through the development of strong statewide coalitions, states are able to share information, build partnerships, and understand the challenges of asset building, all of which are critical in the development of sound assets policy in states.

Based on feedback received, participants felt that more work and information sharing is needed and another meeting of this type would be beneficial and warranted. Therefore, CSD is happy to announce that through the generosity of the Annie E. Casey Foundation and the Federal Reserve Bank of Kansas City, a second meeting will be convened in Kansas City, Missouri, at the offices of the Federal Reserve Bank of Kansas City, tentatively scheduled for June 2009.

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