Coalitions and Transformational Change
Worksheet: Reflect and Identify Actions

At Community Wealth Partners we set out to answer one powerful question: How can social change initiatives achieve transformational results? Drawing on lessons from a variety of social movements and our ongoing partnerships with clients nationwide, we are decoding what works and bringing you our insights—insights that anyone who dreams of solving a social problem can apply.

Consider which of the transformation insights you want to spend more time exploring. Find a table with that insight.

Transformation Insights:

Be Bold and Believable

Create Shared Ownership

Open Your Circle

Communications Is Strategy

Reframe the Conversation

Build Culture Intentionally

Experiment, Learn and Evolve

Name of Insight #1:

Reflection
Why is this insight an important tactic for achieving my goal? What have we done so far? What have we learned from that? What has been challenging?

Applying Learning and Planning Ahead
What ideas or tactics did I hear today that I would want to try or explore more? What advice did I hear from peers that I might consider? What is one next step I can take in the next three weeks?

Name of Insight #2:

Reflection
Why is this insight an important tactic for achieving my goal? What have we done so far? What have we learned from that? What has been challenging?

Applying Learning and Planning Ahead
What ideas or tactics did I hear today that I would want to try or explore more? What advice did I hear from peers that I might consider? What is one next step I can take in the next three weeks?

Take-Home Exercise
Social Transformation Lifecycle

At Community Wealth Partners we set out to answer one powerful question: How can social change initiatives achieve transformational results? Drawing on research from a variety of social movements and our ongoing partnerships with clients nationwide, we've identified four broad stages along which transformational efforts generally evolve.

Take this exercise to your coalition and work together to consider which lifecycle stage your effort is in. Use the reflection questions below to assess the current status of your effort and identify next steps.

Stage 1: Start-Up
Framing the Effort
- What is our bold goal? What is our role in achieving this goal?
- Who should be engaged?
- What messages and channels will help build awareness among key stakeholders?
- How do we establish intentional culture across the effort?
- What does success look like?

Stage 2: Early Implementation
Proving the Solution(s)
- What is our approach to realizing our bold goal?
- How do we engage early adopters?
- What messages and channels will build engagement, inspire action and contribute to behavior change?
- How do we ensure that we are living what we believe?
- How do we know if our approach is working? What changes need to be made if we're not achieving the desired results?

Stage 3: Scale
Reaching Dramatic Improvement
- How will we scale our approach to reach our bold goal?
- Who do we need to engage to achieve scale? How do we convert the maybes?
- How do we create contagious ideas and equip others to own the messages and the solution(s)?
- How do we maintain our culture as we grow?
- How do we know if our approach continues to work as we scale? What changes need to be made if we're not achieving the desired results

Stage 4: Last Mile
Reinvigorating the Effort
- How do we need to change our approach, if at all, to realize our bold goal?
- How do we sustain interest? Who might we need to engage that we have not engaged so far?
- How should we adapt our communication strategy, messages and actions?
- How must we adapt our culture to the new context?
- How close are we to our bold goal? What do we need to learn to get closer?