



Identifying and prioritizing members of your guiding coalition

INTRODUCTION

To keep both implementation and the policy that supports it on track, you'll need a critical mass of powerful internal and external stakeholders to be aligned with your aspiration and the work you're doing to achieve it. This group is what John Kotter called a guiding coalition: A small team of seven to ten people, in key positions of influence, who agree profoundly with you about what must be done and how to do it.¹

In this exercise, participants identify and prioritize members of the system's guiding coalition. The aim is to identify stakeholders with the right balance of expertise and influence called upon to support your implementation efforts.

The exercise should ideally be completed by the system leader, potentially with the input of his/her leadership team.

OBJECTIVES

- Identify potential members of your guiding coalition
- Prioritize members of your guiding coalition

MATERIALS NEEDED

- Recreate the template on page 5 and post on the wall. You can do this by printing a large version of page 5 and hanging that on the wall, or by recreating the template on a dry erase board, flip chart paper, EDI's signature "brown paper" or in a pinch projection of a computer screen. However you create this, it needs to be visible to the entire group and easy to change and add to.
- Rather than writing directly on the template you've created, you'll need to use small, repositionable cards. These cards can be just small pieces of paper, index cards or Post-Its, and there are a number of ways to make sure they are repositionable. If on a dry erase board, you could use magnets to hold cards in place, and on other surfaces, you could use sticky tack or spray-on adhesive – whatever won't damage your wall.
- Markers
- Printed handout on page 4

¹ Kotter, J. (2012). *Leading Change*. Boston, MA: Harvard Business Review Press.

**INSTRUCTIONS**

Time	Activity	Facilitator notes	Materials
15 minutes	Brainstorm potential members of the guiding coalition and record them on cards	<ul style="list-style-type: none">■ Ask participants to think broadly, drawing upon the handout as necessary, and call out suggestions for the guiding coalition; record them on cards and post them to the template■ Encourage participants to make sure they are identifying a wide range of leadership who represent the four types of power identified in the handout: position power, credibility, expertise, and leadership	<ul style="list-style-type: none">■ Template■ Cards■ Markers■ Handout
25 minutes	<ul style="list-style-type: none">■ Eliminate the identified stakeholders who are staunchly opposed to the work, either because they disagree with the aspiration or the approach to achieving it; remove the cards for these names from the template■ Reflect on the power and influence of each of the potential members of the guiding coalition, particularly discussing for each:<ul style="list-style-type: none">– How powerful are they relative to the others (low, medium, high, very high)?– What kind of power do they have (position power, credibility, expertise, leadership, or some combination)?– What is the sphere of influence where they exercise power?	<ul style="list-style-type: none">■ First, ask participants whether any of the stakeholders identified should be removed; if so, remove their cards from the template■ Next, walk participants through each stakeholder and ask them to discuss the questions while you record notes on the template	<ul style="list-style-type: none">■ Template■ Cards■ Markers■ Handout



Time	Activity	Facilitator notes	Materials
20 minutes	Prioritize and narrow the list to include the 7-10 most important people to focus on as members of the guiding coalition	<ul style="list-style-type: none">■ Begin by asking the group to prioritize and see if they can do it through discussion■ Draw upon these questions:<ul style="list-style-type: none">– Is the group sufficiently powerful to give you what you need?– Is there sufficient diversity, both in types of power being exercised and sphere of influence?– Does the group cover the constituencies you need to be successful?– Do guiding coalition members have the potential to work well together?■ If participants do not come to consensus on 7-10 through this conversation, have them vote by raising hands, making tick marks with markers, or using stickers■ Circle or place stars next to the 7-10 most important guiding coalition members the group identifies	<ul style="list-style-type: none">■ Template■ Cards■ Markers■ Handout

**HANDOUT: IDENTIFYING AND PRIORITIZING MEMBERS OF YOUR GUIDING COALITION**

Consider these likely groups to inform your brainstorm of potential guiding coalition members:

Level	K–12	Higher Education	Both
State	<ul style="list-style-type: none"> ■ Secretary of Education and staff ■ State Board of Education members and staff ■ State Education Agency leaders and staff ■ Regional leaders ■ Local superintendents ■ Principals ■ Union and professional association leaders ■ School boards association leaders 	<ul style="list-style-type: none"> ■ Higher education governing board members and staff ■ System office leaders and staff ■ Faculty Senate leaders and members ■ Campus presidents, chancellors, provosts, and department chairs 	<ul style="list-style-type: none"> ■ Governor’s office (particularly education policy advisors) ■ Legislature (particularly education committee chairs or their advisors) ■ P-20 Council members and staff ■ Advocacy organization leaders and staff
Local	<ul style="list-style-type: none"> ■ School board members ■ Key central office staff ■ Principals ■ Department heads and other teacher leaders ■ Teachers ■ Union leaders ■ Parents 	<ul style="list-style-type: none"> ■ Provosts and vice provosts ■ Key campus staff ■ Department chairs ■ Faculty senate leaders ■ Faculty members 	<ul style="list-style-type: none"> ■ Mayoral and/or county office executives and staff ■ City council members or equivalent ■ Leaders of local philanthropies ■ Leaders of community-based organizations

Be sure to consider whether your guiding coalition members represent a variety of Kotter’s four types of power:

- **Position power:** Do they have formal authority that is essential to policy or implementation? This could mean that they manage a team or an organization whose support is vital, or that they have constitutional or statutory authority to make certain critical decisions.
- **Credibility:** Do they have informal authority that comes from respect or reputation – particularly with one of the broader circles that you need to influence? These aren’t necessarily the people with the most impressive titles or jobs – but almost anyone you ask will know who they are. Perhaps it’s a particular principal or campus provost who inspires respect and admiration amongst their peers. If they’re with you, many others will be, too.
- **Expertise:** Do they have power because they have deep knowledge of your work? An expert in education labor law might be the right person to help you navigate the legal implications of your teacher and leader effectiveness work, for example; or a dean who has served at the campus level for 30 years might know “how things work” at that institution – and therefore, how to change the way they work better than anyone else.
- **Leadership:** Do they have power because they are strong leaders? You will need your guiding coalition members to be competent people who you can trust to act on your behalf and to do so effectively.

