Coalition Administration Best Practices

How Can Strong Administrative Practices Enhance Coalition Impact?

- Ensure smooth operations and reduced errors
- Create continuity and smooth transitions
- Reduce burden and confusion for staff onboarding
- Reduce time spent on administrative tasks
- Free up time for higher-impact coalition activities
- Align a team on systems and standards (standard operating procedures)
- Facilitate accurate and accessible documentation
- Streamline performance tracking and reporting
- Reduce organizational risk

Active and Effective Requirements

Administration Files: The coalition must maintain critical coalition administration files including information needed to ensure operational continuity in the event of staff transitions or organizational change. These files must be made available to the stakeholder group and host organization management (if the coalition is hosted) and they must be updated at least once per year. Administration files must contain at a minimum: stakeholder list, current and past funders, current funding agreements, programs and activities, and procedures for how to perform key coalition activities.

Coalition Case Studies

- Megan Upchurch—Centralina Clean Fuels Coalition
  - Housed at a Council of Governments
- Joy Gardner—Empire Clean Cities
  - Standalone nonprofit

Where To Start

- What is the coalition's relationship structure with its housed organizations?
- Where are your housed organizations files stored? Do you have access?
- Who signs the contracts and has final approval of potential project scopes? Grant applications?
- How is your housed organization structured vs. how your coalition is structed?
- What level of funding requires board approval? What can be approved at the executive director level?
- Who handles what for reporting requirements?



Tips and Tricks for Housed Organizations

- Identify your key contacts in finance, HR, and upper management. Bring them into conversations as early as you can.
- Leverage meetings with your direct report for current and anticipated projects.
- Develop/utilize SOPOs and transition plans.
- Build in flexibility (as possible) into all processes:
  - Contracts
  - Budgets
  - Planning
  - Review periods
  - And more…



Working With Finance Departments

- Connect with finance staff on:
  - Budget processes
  - Expense reports
  - Contracts
  - Invoices
  - Compliance and reporting
  - Financial documentation (e.g., audits, IRS tax exemption, hourly rates, direct and indirect rates, cost share/match, SAM ID/UEI)
  - Timesheets
  - Setting up a new grant/project.
- Identify average turnaround times for each process.
- Incorporate staff into the planning stage early.

Nonprofit Resources

- **Free and Discounted Administrative Tools**
  - **Google for Nonprofits:** Free or discounted Google Workspace plans (email, shared documents, storage) and up to $10,000/month in Google Ad Grants.
  - **Microsoft for Nonprofits**: Donated or discounted Microsoft 365, cloud services, and other productivity tools.
  - **Canva for Nonprofits:** Free access to premium design tools, templates, and team collaboration features.
  - **TechSoup:** Discounted software, technology, cybersecurity tools, and IT services for nonprofits.

- **Pro Bono Services and Capacity Building**
  - **National Council of Nonprofits:** Provides policy updates, legal guidance, and operations resources.
  - **Taproot Foundation:** Connects nonprofits with skilled volunteers for strategic planning, marketing, fundraising, HR, finance, and technology projects.
  - **Catchafire:** Skills-based volunteer support for communications, website development, fundraising, and organizational capacity.
  - **Local universities:** Student consulting projects, internships, research partnerships, and pro bono technical assistance.

- **Local Funding and In-Kind Support**
  - **Municipal contracts:** Small contracts with city and county agencies for outreach, stakeholder engagement, research, and technical assistance.
  - **In-kind agency support:** Office space, meeting rooms, event venues, staff expertise, and promotional assistance.
  - **Local foundations and corporate giving:** Grants and sponsorships for workforce development, clean transportation, and community engagement.

Clean Cities and Communities

Empire Clean Cities

THANK YOU!

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Q&A and Discussion

- CC&C Best Practices: Administration Files—https://cleancities.energy.gov/toolbox/files/pdfs/maintaining-administration-files.pdf
- CC&C Best Practices: Developing Standard Operating Procedures—https://cleancities.energy.gov/toolbox/files/pdfs/developing-sops.pdf
- Financial Management for Clean Cities and Communities Coalitions—https://cleancities.energy.gov/toolbox/files/pdfs/financial-management.pdf

