



Request for Applicants

Ohio Coalition Institute 100: Coalition Operations and Management Learning Community

Contract Period: January 21, 2026- September 30, 2027

Application deadline: November 9, 2026, 5:00PM

Funding Available: \$4,000 per award

Ohio Coalition Institute Background and Intent

The Ohio Coalition Institute (OCI) is a dynamic and culturally responsive network that supports and builds capacity and connections for all behavioral health and public health connected coalitions across Ohio. OCI is dedicated to enhancing community coalition impact by providing accessible, high-quality learning opportunities that help communities address complex social challenges. More information about OCI can be found at www.ohiocoalitioninstitute.org.

About the OCI Learning Communities

OCI will offer three learning communities between December 2026 and September 2027 to support and elevate behavioral health-connected coalitions throughout Ohio:

1. OCI 100: Coalition Operations and Management
 2. OCI 200: Data-Driven Strategic Planning
 3. OCI 300: Coalition Collective Impact
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OCI 100: Coalition Operations and Management

Learning Community Content and Structure

The OCI 100: Coalition Operations and Management Learning Community offers practical, actionable training designed to strengthen coalition operations, boost member engagement, and drive sustainable community impact. Participating coalitions will focus on establishing foundational operations and governance, recruitment and engagement, branding and communications efforts, facilitation, leadership and management, as well as navigating change. Learning community members will support each other, share knowledge and individual successes, and navigate challenges as a group.

Successful applicants will participate in an eight-month learning community alongside other Ohio-based coalition leaders. Participants will receive structured training, technical assistance, coaching, peer-learning opportunities, tools, templates and other resources that are designed to support operating and managing a coalition. Content is based on the work of Dr. Frances Dunn Butterfoss, PhD, and the book *Ignite! Getting Your Community Coalition "Fired Up" for Change*.

At the conclusion of the Learning Community, participating coalitions will have developed a SWOT (strengths, weaknesses, opportunities, threats) analysis and will have the choice to complete two of the following: membership gap analysis/recruitment plan, coalition by-laws, coalition action plan, or a coalition communications plan.

Who Should Consider Applying?

This competitive RFA process aims to support any Ohio-based, behavioral health and public-health connected community coalitions that aims to establish basic coalition structure, enhance their policies and procedures that support the daily operations of managing a coalition. This opportunity is open to new and established coalitions whose needs are aligned with the intent and content of the learning community. See Appendix A for a content outline and learning objectives.

Applicant coalitions may be a stand-alone entity, with 501c3 status, or housed within a nonprofit organization, county/regional behavioral health board, local health department, educational institution, healthcare organization, or another community-based organization. The coalition must confirm they have 501c3 status and is able to directly accept funds or provide a letter of support from the organization that will serve as their fiscal agent at the time of application.

This learning community is not a fit for established coalitions with consistent leadership, coalitions that are seeking support to utilize data to drive decision making or coalitions that wish to focus on collective impact initiatives.

What are the Participation Expectations for Successful Applicants?

This learning community is structured to allow members and coaches to support each other, share knowledge and individual successes, and navigate challenges as a group. The learning community structure embraces the concept of “productive struggle,” and are not classified as trainings. Learning community participants will be responsible for:

- 1. Ensuring 2-3 coalition representatives attend each learning community session.**

Representatives should include the coalition director and ideally the same 1-2 individuals for the duration of the learning community. Representatives should include individuals who:

- a. Have knowledge of the coalition's current work and community priorities;
- b. Can actively participate in learning community sessions and coaching activities;
- c. Can support completion of program deliverables.

- 2. Participating in monthly coaching sessions with an experienced coalition leader.**

No-cost coaching sessions will provide additional support to apply learning community concepts to coalition planning, review strategic plan, evaluation plan, and sustainability plan progress, address challenges, enhance deliverables, and prepare for the final session that showcases the coalition's immediate impact activity. Coaching sessions will be scheduled at the mutual convenience of the coalition and their assigned coach.

- 3. Completing program deliverables.**

Coalitions will receive support from the coaches, trainers and peers to develop, refine and complete the following deliverables throughout the learning community.

- 4. Hosting an OCI Staff member at a regularly scheduled coalition meeting.**

The purpose of the site visit is to better understand the coalition's community context, relationships, planning process, and experience participating in the learning community.

- 5. Supporting the Program Sustainability Assessment Tool (PSAT).** The PSAT allows stakeholders to rate their coalition to the extent of which they have processes and structures in place that will increase the likelihood of sustainability.

Funded communities should plan to spend approximately 30 “people hours” per month on OCI during the contract period, including travel to and from learning community sessions. How the hours are broken out will be different for each community and will vary by month, but could look like:

- Three people attending an in-person learning community, 1 person attending the coaching session and five people attending a coalition subcommittee meeting.
- Two people attending a virtual learning community session, 3 people attending a coaching session and a four-person subcommittee meeting twice with each person doing 3 hours of work in between subcommittee meetings to advance progress on deliverables.

FLEXIBLE LEARNING STIPEND

Successful applications will receive a flexible learning stipend of \$4,000 because they are responsible for producing deliverables at the end of the contract period. The flexible learning stipend is intended to be an initial investment to catalyze planning efforts. The stipend cannot be used to support ongoing operational funding, or supplant other coalition expenses

For the RFA application, applicants only need to submit a budget and narrative covering their travel costs and time (if applicable) for attending the learning community and coaching sessions. During the learning community sessions, participants will learn how to budget and spend the remaining flexible stipend to support their project goals. Each coalition will then submit a budget revision during the project period detailing how those remaining funds will be used.

Please note the following important details regarding the flexible learning stipend:

- The coalition or coalition’s fiscal agent will establish a vendor contract with Ohio University.
- The fiscal agent must provide a letter of support to serve as the fiscal agent as part of the application process. A template can be found on the [OCI website](#).
- Funding will be awarded on a reimbursement basis during the contract period.
- Grantees may invoice Ohio University at any time during the contract period.
- All expenses must be incurred during the contract period.
- All invoices must include required documentation to substantiate expenses.
- Expenses must directly support participation in the learning community and completion of associated deliverables.

RFA SUPPORT

An asynchronous Bidders Informational Webinar will be posted to the [OCI website](#) on October 14, 2026. Questions may be submitted to OCI@ohio.edu prior to November 3, 2026 at 5:00pm. Responses to all questions received will be posted on the [OCI website](#) by November 4, 2026 at 5:00pm.

Organizations are encouraged to use online resources, such as those found in [The Community Tool Box](#), as needed, to assist with the grant writing process.

APPLICATION PROCESS AND DATES

A copy of the application questions can be found in Appendix B of this document.

Applications can be submitted by November 9th at 5:00 PM using this link:

https://ohio.qualtrics.com/jfe/form/SV_ezVnCOVMdxl6xuK. A completed application includes:

- Responses to all questions in the survey.
- A letter of support from the fiscal agent
- A budget and narrative that outlines the cost for coalition representatives to attend the learning community and coaching sessions (if needed). The link to the Grants Budget Expenditure Form worksheet (which includes a column for the budget and narrative), can be found on the [OCI website](#).

OCI anticipates notifying applicants of a decision by December 18, 2026. Applicants will be asked to confirm they have placed holds on their calendars for all key learning community dates (see Appendix A) at the time of application.

Not Going to Apply?

Tell us what prevented you from applying for this learning and funding opportunity by filling out this three question [survey](#). Your anonymous response will help us improve our offerings in the future.

Evaluation Criteria

1. **Coalition Structure & Leadership:** Evaluates the structural stability and human resources dedicated to the project, applicant clearly describes leadership framework and organizational evolution showing stability and momentum. An example of a recent project, including rationale for selection, planning/implementation process, and measurable success is provided.
2. **Operational Capacity:** Evaluates the coalition's capacity to plan, execute and measure impactful community-level initiatives.
3. **Coalition Readiness, Intent & Sustainability:** Evaluates the coalition's readiness to participate in the learning community. The applicant articulates a concrete vision for how participation has the potential to create meaningful impact across the community.



Appendix A. Coalition Operations and Management Learning Community: Course Content and Learning Objectives

Each session is designed to enhance coalition infrastructure and capacity based on coalition best practices, regardless of each participating coalition's primary problem of practice. Participants can expect discussion, learning and activities that are focused on:

1. Developing the knowledge, skills, and attitudes for enhancing the infrastructure and sustainability of local community coalitions;
2. Collaborating with peers to enhance community coalition efforts;
3. Completing three, coalition-chosen deliverables, supporting infrastructure, efforts, and sustainability.

Session 1: January 22, 2027 • 9:00 AM – 4:00 PM

Description & Learning Objectives:	Coalitions that Work: Best Practices for Building a Strong Foundation Having the right foundation, structure, organization, and resources in place to support coalition work is critical to success. This session will help participants set up their coalition for success. Upon completion, participants will: 1. Describe the purpose of a coalition and explain the importance of coalition work. 2. Assess the coalition's foundational strengths by conducting a SWOT analysis. 3. Develop effective mission and vision statements. 4. Identify coalition structures and member commitments that support long term success.
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Session 2: February 10, 2027 • 9:00 AM – 4:00 PM

Description & Learning Objectives:	From Seats to Commitment: Building & Engaging an Effective Coalition Building a strong coalition requires both recruiting the right people and keeping members engaged over time. Participants will learn strategies for attracting stakeholders, communicating the value of coalition membership, welcoming and onboarding new members, strengthening member engagement, and managing membership effectively. Participants will leave with a practical recruitment and engagement plan to guide outreach, onboarding, participation, and retention. Upon completion, participants will: 1. Identify organizations and individuals that can contribute to their coalition's efforts and impact. 2. Recognize the essential components of a membership recruitment plan. 3. Describe strategies for engaging coalition members at the time they join and for retaining coalition members over the long term. 4. Describe best practices for managing coalition membership including communication, role clarification, and ongoing support.
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Session 3: March 10, 2027 • 9:00 AM – 4:00 PM

Description & Learning Objectives:	Part 1: Increasing Coalition Visibility: Building Capacity Through Clear Messaging Developing branding and communication plans helps coalitions define their identity and share their work more effectively. This session explores what these plans include and how coalitions can use them to increase awareness of their work and encourage greater community engagement. Upon completion, participants will: 1. Recognize the essential elements needed to build their coalition brand. 2. Identify the steps of developing an effective branding and communication plan. 3. Express important information about their coalition with key audiences.
	Part 2: Mastering Coalition Meetings: Structure, Facilitation, & Follow-Through Well-structured and well-facilitated meetings are the foundation of a strong coalition. However, many individuals have never received formal training in how to lead meetings effectively. This session will cover the key components of successful coalition meetings and help participants develop the skills needed for confident and effective meeting facilitation. Upon completion, participants will: 1. Recognize how to create an effective coalition meeting environment. 2. Describe key meeting management strategies. 3. Identify meeting facilitation skills necessary for leading an effective meeting.

Session 4: May 7, 2027 • 9:00 AM – 4:00 PM

Description & Learning Objectives:	Part 1: Managing the Money: Fiscal Management Basics and Building an Effective Fiscal Agent Relationship Coalition leaders will gain a practical understanding of fiscal management basics, including budgeting, financial oversight, accountability, and responsible use of coalition funds. Participants will also learn how to establish clear roles, expectations, and communication with a fiscal agent to support effective financial management and strengthen organizational accountability. Upon completion, participants will: 1. Understand the basic principles of fiscal management. 2. Identify roles and responsibilities of coalition leaders and fiscal agendas in managing and overseeing coalition finances. 3. Develop strategies for establishing and maintaining an effective fiscal agent relationship.
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	Part 2: Beyond the Budget: Leveraging People, Partnerships, and Resources to Do More with Less Coalition leaders will learn to move beyond a scarcity mindset and recognize the people, partnerships, relationships, skills, and resources already available within their communities. Participants will explore strategies for leveraging human and organizational capital, strengthening partnerships, and creatively mobilizing resources to advance coalition goals, even when funding is limited. Upon completion, participants will: 1. Recognize and challenge scarcity-based thinking and shift toward an asset-based approach to coalition work. 2. Identify and leverage existing human, organization, and community resources to advance coalition goals. 3. Develop strategies for strengthening partnerships and sharing resources to increase collective capacity. 4. Prioritize creative, high-impact approaches for accomplishing coalition goals with limited financial resources.
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Session 5: June 16, 2027 • 9:00 AM – 4:00 PM

Description & Learning Objectives:	Part 1: From Ideas to Impact: Project Management for Coalitions Many coalition support staff and administrative volunteers find it challenging to manage projects and strategic activities while also ensuring volunteers follow through on their responsibilities. This session will focus on effective volunteer management, support, and coaching, while helping coalition leaders successfully oversee projects and keep coalition work on track. Upon completion, participants will: 1. Define project management and why it is important for coalition success. 2. Describe the phases of the project management life cycle. 3. Explain the elements of a successful project and its potential vulnerability.
	Part 2: Building Buy-In: Effective Change Management for Coalitions Established relationships, shared history, and competing interests can make coalition change difficult. Shifts in operations may feel threatening when they disrupt long-standing routines. This session explores how to recognize and address the fear of change while supporting members and leaders in adopting practices that enhance effectiveness and sustainability. Upon completion, participants will: 1. Define organizational change and the challenges it presents for groups. 2. Explain practical tips for overcoming individual and group resistance to change. 3. Describe a minimum of three best practices for practice managing change within a coalition.



Session 6: August 19, 2027 • 10:00 AM – 3:00 PM

Description & Learning Objectives:	Deliverable & Coalition Showcase: Reflecting, Presenting, & Celebrating Success Participants will gather for a final session to celebrate the achievements of coalition leaders from across the state. This session emphasizes shared learning, providing dedicated time to reflect on the challenges and successes of applying cohort insights in the field. Participants will examine key findings and look ahead to future engagement and growth opportunities through the Ohio Coalition Institute. Upon completion, participants will: 1. Articulate key learnings from peer-exchange and participation in the Coalition Operations and Management Learning Community. 2. Showcase experiences and gain new perspectives from peers and stakeholders. 3. Apply knowledge directly to their coalition’s operations and management efforts.
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Appendix B. Ohio Coalition Institute 100: Coalition Operations and Management
Learning Community
Application Questions

COALITION INFORMATION

1. Coalition name
2. Coalition address
3. Counties served by coalition
4. Year the coalition was established
5. Coalition mission statement
6. Number of coalition members
7. Number of coalition members who regularly attend meetings and are engaged in coalition activities
8. Please select your coalition's main area of focus. (The options align with the [OCI Coalition Directory Service Categories](#)). If your coalition focuses on multiple problems of practice, please choose all that apply.

COALITION CONTACT INFORMATION

The individual listed here will be the primary contact for this learning opportunity

1. Name
2. Title
3. Coalition role
4. Employer
5. Email address
6. Phone number

COALITION FISCAL INFORMATION

1. Does the coalition have 501c3 status?
 - A. Yes
 - B. No
2. Fiscal Agent (Name of organization that will enter into contract with Ohio University on the coalition's behalf)
3. Fiscal agent address
4. Fiscal coordinator name
5. Fiscal coordinator email
6. Fiscal coordinator phone

COALITION VIRTUAL PRESENCE

1. Website
2. Facebook handle
3. Instagram handle
4. Linked In handle

LEARNING COMMUNITY REPRESENTATIVES

In addition to the coalition coordinator, each coalition must designate **one to three representatives** to attend each learning community meeting. Please provide the required contact information for your designated representatives below. Because OCI staff will periodically communicate with all learning community members, **a unique email address must be provided for each individual.**

If you are designating one or two representatives, enter n/a in the text boxes in which you do not have information to enter.

Representative 1 Name
Representative 1 Organization
Representative 1 Title/Role in Coalition or Organization
Representative 1 Email

Representative 2 Name
Representative 2 Organization
Representative 2 Title/Role in Coalition or Organization
Representative 2 Email

Representative 3 Name
Representative 3 Organization
Representative 3 Title/Role in Coalition or Organization
Representative 3 Email

COALITION STRUCTURE

1. **Leadership Structure:** Describe the coalition's leadership structure.
2. **Evolution & History:** Provide a brief description of how the coalition has evolved over time.
3. **Meeting Frequency:** How often does the full coalition membership meet?
4. **Funding & Resources:** How is the coalition's work currently supported or funded? *(If your coalition does not receive external funding, please describe how activities and operations are resourced.)*
5. **Recent Initiative:** Describe the most recent activity or initiative implemented by your coalition. Your response must address:
 - a. What activity was implemented?
 - b. Why was it implemented?
 - c. How was it planned?
 - d. Who implemented it?
 - e. How did the coalition measure or demonstrate its success?
6. **Subcommittees & Working Groups:** Does the coalition have active subcommittees, working groups, or task forces?
 - a. If yes, list the name of the subcommittee and meeting frequency for each?

SECTOR REPRESENTATION

1. Please identify which [sectors](#) are represented within the coalition membership.
2. Please describe any challenges the coalition experiences in engaging its membership?

OPERATIONS AND MANAGEMENT DELIVERABLES

Beyond the required SWOT (strengths, weaknesses, opportunities and threats) analysis, which TWO deliverables does the coalition most need to develop or refine? *Note: You will have the opportunity to change your deliverables after the learning community begins.*

Bylaws

Membership Gap Analysis & Membership Recruitment Plan

Coalition Action Plan

Coalition Communications Plan

COMMITMENT AND SUSTAINABILITY

1. **Motivation & Goals:** Why does the coalition want to participate in this learning opportunity?
2. **Capacity Building:** Which skills, knowledge, or organizational capacities does the coalition hope to build through this learning community?
3. **Community Impact:** How will participating in this strategic planning process directly benefit your community?
4. **Sustainability & Implementation:** How does your coalition plan to implement, sustain, and utilize the completed strategic plan moving forward?

Documents for upload

Please upload a completed [Grants-Budget-Expenditure-Form](#) (this is the budget and budget narrative). For the RFA application, applicants only need to submit a budget and narrative covering their travel costs and time (if applicable) for attending the learning community and coaching sessions. Participants will learn how to complete a budget to spend the remaining flexible learning stipend to support their project goals during the learning community sessions and will submit a budget revision during the project period.

Please note the following important details regarding the flexible learning stipend:

- The coalition or coalition's fiscal agent will establish a vendor contract with Ohio University.
- The fiscal agent must provide a [letter of support](#) (template available on the OCI website) to serve as the fiscal agent as part of the application process.
- Funding will be awarded on a reimbursement basis during the contract period.
- Grantees may invoice Ohio University at any time during the contract period.
- All expenses must be incurred during the contract period.
- Mileage expenses are reimbursable only at the rate set forth by the Ohio Office of Budget and Management Rul 126-1-02. At the time of writing this RFA, mileage is set at \$.58/mile.
- All invoices must include required documentation to substantiate expenses.
- Expenses must directly support participation in the learning community and completion of associated deliverables.

Files to upload:

1. Completed budget/narrative.
2. Letter of support from fiscal agent.

COALITION COMMITMENT STATEMENT

The applicant certifies that the information provided in this application is true, accurate, and complete, and reflects the coalition's full commitment to participating in the OCI 100: Operations and Management Learning Community.

By submitting this application, the coalition agrees to:

- **Full participation and learning community attendance:** Actively participate in all Operations and Management Learning Community Sessions and coaching opportunities.
- **Member Engagement:** Regularly engage coalition members throughout the process to complete deliverables.
- **Deliverable Completion:** Complete all required learning community assignments and project deliverables between sessions.
- **Support the PSAT:** Participate in and support the administration of the Program Sustainability Assessment Tool (PSAT) as guided by the OCI team (more information will be provided).
- **Site Visit Host:** Host an OCI staff member at one regularly scheduled coalition meeting during the project period for a site visit (more information will be provided).