

# Utility of the advocacy coalition framework in a regional budget crisis

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## Abstract

The advocacy coalition framework predicts that externally controlled events, such as jurisdictional shifts, can open venues for policy change within a policy subsystem. Advocacy coalitions may opt to look outside of their traditional decision-making venue for a more suitable venue. Yet, how and when coalitions use their political resources during this venue shift is unclear. We examine how coalitions leverage policy venues and resources when their traditional strategies are found unproductive. We empirically test how advocacy coalitions engage their political resources during an exogenous shock. Using semi-structured interviews with eight individual coalition leaders representing an estimated 1100 individual charities, this study distils whether and how coalition resources and venue shifts are used by subsystem actors. Three main strategies emerge, and we find that some resources are employed in a unique way during the policy implementation crisis, as opposed to how they are used during their original policy advocacy. Finally, we propose further refinement of the advocacy coalition framework to accommodate points of crisis on the complex road from policy

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advocacy to implementation. From this study, coalitions can learn how to leverage their resources and navigate to an effective decision-making venue to ensure that external crises do not lead to policy failure.

### **Keywords**

Advocacy coalition framework, budget crisis, charities

## **Introduction**

Though the application of theory to practice has long been a tenet of policy research, increasing political polarization in many countries is causing a resurgence of interest in the applicability of classic theories to the rigors of actual policy-making. For example, Sabatier (1986) developed the advocacy coalition framework (ACF) almost four decades ago to explain how actors with shared beliefs coordinate action to achieve the common goal of reaching a mutual policy outcome. The original framework holds as its core principle that people seek to translate beliefs into action through coordinated approaches and engagement in politics (Sabatier and Weible, 2007). While the ACF's purpose has held up against the test of time, it has also undergone substantial revisions to account for additional coalition resources (Mintrom and Vergari, 1996; Sewell, 2005; Weible, 2006), coalition opportunity structures (Sabatier and Weible, 2007), and internal and exogenous shocks to the policy subsystem (Nohrstedt, 2005; Sabatier and Jenkins-Smith, 1993; Zafonte and Sabatier, 2004). In 2007, Sabatier and Weible recognized the difficulties of theory keeping up with reality and suggested that one of the most critical questions the authors laid out for future research is "to what extent can the ACF be used as a practical tool for policy makers?" (p. 209; Weible, 2006).

This study responds to that call by empirically evaluating whether the theoretical framework of ACF is useful to explain how independent coalitions behave during an exogenous shock created by a financial policy crisis. The actions of social service providers during the 2015–2017 budget crisis in the State of Illinois in the United States is a robust opportunity to assess the ACF operationalization by actors in the subsystem. During this period, the State of Illinois was at a policy stalemate without a budget, and social service providers (primarily charities) held signed contracts with the State of Illinois to deliver services on its behalf. The state delayed or stopped payments for the services these organizations rendered under their state-initiated and executed contracts. This created a technical policy victory according to the ACF (contracts were awarded to the coalition members or charities), but resulted in a fiscal policy crisis. In this study, we examine how stable, independent advocacy coalitions engage their political resources during this type of exogenous shock.

This study consists of semi-structured interviews with leaders from eight individual coalition who represent an estimated 1100 individual charities. We find that the ACF provides a useful framework for understanding how tools are used by subsystem actors, particularly in the use of coalition resources and venue shifts. We also find that some of these resources are employed in a unique way during an exogenous shock, as opposed to how they are used during original policy advocacy. Lastly, we propose further refinement of the ACF to accommodate points of crisis on the complex road from policy advocacy to implementation.

## **Using the advocacy coalition framework in policy formulation**

The ACF articulates a system of relationships among variables driving bottom-up policy change (Pierce et al., 2017b) and explains changes during periods of policy conflict (Pierce and Weible, 2016). In the main policy subsystem, relevant actors attempt to influence policy based on their beliefs, defined as either deep core beliefs (deeply normative stable beliefs) or policy core beliefs (the application of deep core beliefs which span the policy subsystem) (Sabatier and Jenkins-Smith, 1999). Coalitions form and coordinate around core policy beliefs, with the ACF serving as a coordination and aggregation tool (Weible and Nohrstedt, 2012; Weible and Sabatier, 2005).

In the ACF, two or more coalitions act within policy subsystems to win policies reflective of their beliefs by employing policy-related resources present within the subsystem (Sabatier and Weible, 2007). When there is a crisis internal to the policy subsystem, the ACF predicts that coalitions will exploit resources and shop venues to achieve their policy goals. According to this framework, decisions by authorities and institutional rules can lead to major policy change.

The current ACF literature often explores policy failures through case studies of opposing coalitions fighting for policy solutions which align with their own policy beliefs (Jenkins-Smith et al., 2014). Crises or external shocks can highlight a policy failure (Sabatier and Weible, 2007) and open a primary pathway to policy change (Pierce et al., 2017a). For example, a federal response to a manmade or environmental disaster can demonstrate failures in emergency management policy (Birkland and Waterman, 2008; Kapucu et al., 2010), and a communicable disease outbreak can demonstrate flaws in public health policy (Brower and Chalk, 2003; Gubler, 1997). Nohrstedt and Weible (2010) proposed a typology of policy crises crossing the dimensions of geographic proximity and policy proximity to define a distal relationship between crisis and coalition. Coalitions advocate to resolve, recover from, or prevent future crises using a favoured policy solution reflective of their beliefs and proximate to their interests.

The majority of ACF studies that assessed external or internal crises focused on environmental and energy policy issues (Albright, 2011; Nohrstedt, 2005; Villamor, 2006; Weible and Sabatier, 2005); few studies emphasized economic or finance-related policy issues (Pierce et al., 2017b). Environmental and energy crises are often external, have non-manmade elements, and are out of the control of

the coalitions. Financial and economic policy issues are often purely manmade crises, which often have unique implications that are internal to the policy subsystem. Diaz-Kope et al. (2013) reported on the role of bankruptcy as an internal shock which drove policy advocacy in a multi-coalition case study. The policy-proximate crisis of the auto industry was predicated by individual corporate bankruptcies (Diaz-Kope et al., 2013), causing an internal crisis that demanded urgent attention from policy-brokers and policy-makers. Their study illustrated that the resolution of internal economic crises may lead to wide-reaching policy change. Though policy crises alone are not sufficient to drive policy change, engagement of ACF's secondary components such as venue shifts and distribution of coalition resources may be necessary to overcome them (Pierce et al., 2017a). This study provides such an example, though under circumstances which are better described as an exogenous shock.

Very little literature exists linking the ACF with external financial policy shocks, with most research on policy reactions to financial shocks taking place in neighbouring social sciences such as economics (Fei, 2011; Tanzi, 1986). An exception is a branch of study dedicated to subsystem adjustment analysis, which primarily addresses the reactions of policy subsystems to sweeping external changes such as internationalization (Howlett and Ramesh, 2002; Legro, 2000; Williams, 2009). However, this approach is as much a function of the scale of the external change as it is of the exogenous element. This study forges new ground in using a more tailored shock that is still exogenous to the policy subsystem and, therefore, more appropriately describes use of the components of ACF.

### **Tools of the ACF: Coalition resources and venue shifts**

Coalition resources provide capacity for strategic action within the policy subsystem (Fyall and McGuire, 2015; Jenkins-Smith et al., 2014). Scholars have explored the role of ACF coalition resources in relationship to policy change during a policy stalemate (Ingold, 2011), when driving venue shift (Albright, 2011; Jones and Jenkins-Smith, 2009; Nohrstedt, 2011) and in relationship to the individuals and organizations within a coalition (Elgin and Weible, 2013). Sabatier and Weible (2007) framed a typology of six categories of "policy-relevant resources" (p. 201) as *formal legal authority to make policy decisions, public opinion, information, mobilisable troops, financial resources, and skilful leadership*. Coalition resources can mediate a policy pathway through a policy crisis to a mutually agreeable resolution, but resources alone do not drive policy change (Pierce et al., 2017a; Fyall and McGuire, 2015). To examine the practical applicability of the ACF, we explore how resources have been operationalized and what relationships have been found between resources, policy advocacy, and change.

Scholars of ACF development have called for examination of causal mechanisms within a hierarchical categorization of coalition resources, scaled by effectiveness to policy action (Jenkins-Smith et al., 2014; Nohrstedt and Weible, 2010; Pierce et al., 2017b; Sabatier and Weible, 2007; Weible et al., 2011, 2019).

Under this line of inquiry, Nohrstedt (2011) explored propositions regarding coalition resources among two opposing coalitions and venue shifts such as jurisdictional shifts from the state legislature to the courts. The author included five of Sabatier and Weible's (2007) coalition resources (excluding financial resources) and found that possessing or obtaining the right resources provided greater leverage, in terms of strength and power, than the sum of all other resources. In this case, formal legal authority to make policy decisions outweighed the totality of the other four resources assessed (public opinion, information, mobilisable troops, financial resources, and skilful leadership). This was a first step towards hierarchical categorization of coalition policy-related resources.

Jones and Jenkins-Smith (2009) transitioned the discussion of individually operated policy subsystems to a macro-level analysis joining public opinion, linked subsystem clusters, and policy venues to construct a topography. The result was a permeable network of overlapping subsystems. In this context, public opinion was a coalition resource that shifted around policy subsystems and exploited through venue shopping. Coalitions harnessed a dynamic public opinion rather than react or respond to it.

Access to accurate and complete information about the policy issues and decision setting rules drives successful venue choices (Pralle, 2003) and assists in implementation (Ellison, 1998). Incomplete or inaccurate information can lock coalitions into institutional venues unproductive towards achieving the coalition's policy goals. Albright (2011) analysed policy change resulting from an environmental disaster which exposed flaws in the majority coalition's policy. Two coalition resources, skilful leadership, and the "acquisition of new financial resources" proved effective, as did the opening of a new venue. Each played an important role "in the minority coalition's exploitation of the flood events" (p. 501). Albright called for a "more nuanced understanding of how different types of shocks affect redistributions of resources among coalitions" (p. 507) in order to pinpoint causal mechanisms for policy change. Though policy change occurred, Albright noted weak implementation. This illuminated the problem at hand: coalitions were effective at driving policy adoption, but were unable to enjoy the fruits of their labour when implementation of the policy fell flat.

Under certain circumstances, coalitions opt to look outside of their traditional decision-making venue. Externally controlled events, such as jurisdictional shifts, can open venues for policy change within a subsystem (Albright, 2011; Nohrstedt, 2011). Coalitions shop for policy arenas where institutional rules offer advantages to the coalition over their opponents (Pralle, 2003). Aside from strategic action on the part of a coalition, a superior jurisdiction can impose a policy change (Pierce et al., 2017a). A crisis internal to the policy subsystem emerges (Nohrstedt and Weible, 2010) when the institutional rules themselves become dysfunctional, such as when unmanageable conflict between decision-makers stymies decision-making. In such a case, coalition actors find common coalition strategies do not affect policy change as expected. In response to this type of crisis ACF predicts coalitions may shift venues or political institutions (Baumgartner and Jones, 1991;

Pralle, 2003). Nohrstedt (2011) found that “opening of new policy venues is a factor that can proceed policy change” (p. 479) and recommends teasing out the conflation of decision settings and strategic actions by a policy actor in regard to policy venues. We respond by examining how coalitions leverage policy venues when their traditional strategies are found unproductive.

## Applying the advocacy coalition framework to a policy crisis

To examine how stable advocacy coalitions engage their political resources in response to an exogenous shock, we first needed to map the use of ACF components in the empirical context, then observe how they were used during the crisis. To do this, we conducted a qualitative analysis of eight independent advocacy coalitions, as defined by Weible and Ingold (2018), whose member organizations were directly impacted by the 2015–2017 Illinois Budget Impasse. The study is time-bound (Illinois FY 2016–2018), geographically limited (U.S. State of Illinois), and narrowed to a specific policy arena (human services contractual policy).

### *The U.S. State of Illinois 2015–2017 Budget Impasse*

In the 2015, 2016, and 2017 legislative sessions, the General Assembly for the U.S. State of Illinois failed to meet their constitutional obligation to pass a balanced budget. The Democratic-led General Assembly and new Republican governor were unable to come to an agreement. A chronology of events is available in Table 1.

Notably, the stoppage included both federal pass-through funds and funds with state origin. Following each of the first two impasses, stopgap budgets were authorized for essential services. Being a term subjective in nature, “essential services” did not include all organizations perceived by the public as essential and the definition was inconsistent between the two stopgap budgets. The stopgap budgets meant that the State of Illinois could disburse some funds for limited services because partial spending had been authorized. Organizations excluded from the

**Table 1.** Chronology of Illinois Budget Impasse.

General Assembly Legislative Session	State budget bills
Spring 2015 Session	No state budget
Summer Special Sessions	Stopgap budget approved
Spring 2016 Session	No state budget
Summer Special Sessions	Stopgap budget approved
Spring 2017 Session	No state budget
Summer Special Session	Annual spending and appropriation bills approved

stopgap budgets found themselves contractually obligated to deliver services without receiving payment for another year; further, being included in the stopgap did not necessitate that an organization would receive the full funding contractually due. The policy crisis continued for the human services policy subsystem.

An agreement was finally reached during a special session of the Illinois legislature held the beginning of the 2017–2018 fiscal year. In September 2017, Illinois began reimbursing human service organizations dollars for the previous fiscal year. However, at the opening of the 2018 Illinois Legislative Session, many of the human service organizations included in this study had yet to receive reimbursements for the first year of the budget impasse, Fiscal Year 2015–2016. According to United Way of Illinois, the average amount owed to an organization by the State of Illinois at that point was \$882,000 and one in five non-profits had to close a program during the impasse (United Way of Illinois, 2018).<sup>1</sup>

### *Selection of coalition actors*

We investigate a policy subsystem of human service coalitions and the coalitions' interactions with their respective stakeholders (Jenkins-Smith et al., 2014). Typically, ACF studies include two opposing coalitions. However, we believed the study to be a truer representation of a human services policy subsystem by incorporating multiple coalitions (as opposed to simply limiting it to two opposing coalitions) because nonprofit organizations actively seek membership in coalitions to enhance their policy advocacy (Donaldson, 2007; Fyall and McGuire, 2015). These coalitions were composed of an umbrella organization, member organizations, and local leaders and officials. Nonprofit human service umbrella organizations in Illinois exist as 501(c)3 entities that represent members with similar missions. Principal coalition actors (Weible et al., 2009) were identified through theoretical sampling guided by the core attributes of advocacy coalitions (Weible and Ingold, 2018; Weible et al., 2019). The coalitions all shared three deep core belief, identified when analysing their organizational visions, which were all externally oriented statements about the way the world should be (Ripberger et al., 2014). Table 2 describes the shared deep core beliefs and unique policy core beliefs for each coalition in the study.

While sometimes at odds (based on their competing policy core beliefs), the eight coalitions were united under their shared deep core beliefs that (1) civil society must support its most vulnerable populations (2) strong non-profit organizations are critical in supporting vulnerable populations and (3) non-profits work with and through others to achieve positive outcomes on behalf of those they help. The eight coalitions, which represented over 1100 human service non-profit organizations in Illinois and sometimes competed and sometimes worked cooperatively (Weible et al., 2019) but independently, found themselves united within the human services policy subsystem by their shared deep core beliefs.

Yet, while the eight advocacy coalitions shared deep core beliefs, each held their own unique policy core beliefs, which were reflected in each coalition's individual



**Table 2.** Coalitions in the human services sector policy subsystem.

Advocacy coalitions	Coalitions' primary policy subsystem involvement	Deep core beliefs	Policy core beliefs
Coalition 1	Human, financial and strategic capacity building policy for nonprofit organizations	(1) Civil society must support its most vulnerable citizens. (2) Strong nonprofit organizations are critical to support vulnerable populations. (3) Nonprofits work with and through others to achieve positive outcomes on behalf of others	Strengthening the nonprofit sector through financial resources, education, and collaboration creates positive social impacts for all people in Illinois; Strong nonprofits should be the policy priority
Coalition 2			Stronger human service organizations support a stronger Illinois; Improving the lives of people should be the policy priority
Coalition 3	Youth criminal justice policy		To solve societal ills, youth must be the priority population for service; criminal justice policy must be tailored for youth; Developing youths' futures should be the policy priority
Coalition 4	Poverty alleviation		Policy must comprehensively address poverty from birth to death to improve society's future; Alleviating poverty should be the policy priority
Coalition 5	Victim advocacy policy		In order to have a safe society, private violence in the home must end; Violence against women is political and personal; Creating safe homes through the prevention of domestic violence should be the policy priority
Coalition 6			Policy should focus on individual-level intervention and societal-level prevention/education; Sexual violence impacts all of society and prevention should be the policy priority

(continued)



**Table 2.** Continued

Advocacy coalitions	Coalitions' primary policy subsystem involvement	Deep core beliefs	Policy core beliefs
Coalitions 7	Vulnerable adults policy related to residential and direct services		Vulnerable adults should have dignity in their health care provision; In-home healthcare of elderly and functionally challenged individuals should be the policy priority
Coalition 8			Individuals with physical, mental, emotional and support needs have a right to evidence-based progressive methods of community-based services; The provision of community-based facilities for individuals with physical, mental, emotional, and support needs should be the policy priority.

mission statement, interview data, and websites. Within the eight coalitions, each independent coalition's unique group of policy actors came together under the auspices of a stakeholder organization based on the shared policy core beliefs (see Table 2 for full description of the coalitions' deep core beliefs and policy core beliefs. The stakeholder organizations for each of the eight coalitions shared policy core beliefs provided an organizing force which produced mission statements, framed messages for lobby days, and contributed to policy formation. Eight coalitions independently coordinated actions to achieve their targeted policy outcomes (Jenkins-Smith et al., 2014) based on their shared policy core beliefs (Jenkins-Smith et al., 2014; Pierce et al., 2017b; Weible et al., 2011).

Historically, coalitions argued to lawmakers that without funding for their programs, their clients would face harmful health, pecuniary, or legal consequences. Under normal circumstances, these eight coalitions compete within this human services policy subsystem for contracts, funding, administrative law benefits, and criminal justice policy. However, due to the extraordinary circumstances of the longest state budget impasse in history, coalition actors found that their policy core beliefs were no longer the policy issue at hand, but that their shared deep core beliefs were being threatened. The coalitions agreed at their most fundamental level that civil society had a responsibility to support its most vulnerable populations, and nonprofits were the best conduit for that action. Lawmakers agreed with the coalitions and supported their shared deep core belief and individual missions, but shifted the blame for blocked funding, most often to the opposing political party. During the time period of this study, the eight coalitions cooperated (Weible et al., 2019) because they were united over their shared new goal: an approved state budget for the purpose of fulfilling their contractual relationships. Their shared new goal would ultimately fulfil their shared deep core belief of supporting their vulnerable populations. We explored the shared deep core beliefs and what overlap existed amongst the policy core beliefs in these coalitions in order to group policy actors and coalition members, but we do not measure these beliefs (Weible et al., 2019).

In early ACF scholarship, a ten-year period of policy advocacy was recommended for an ACF study (Sabatier, 1986) with the intent of capturing the temporal processes of public policy. Jenkins-Smith et al. (2017: 9–10) recently cautioned against a literal interpretation of this suggestion because coalitions “often take short-term perspectives as opportunities and constraints alter their immediate strategies.” Though our interviews identified a ten-year reflection on policy activity and coalition learning, analysis was temporally bounded to the budget impasse.

### *Mapping the policy subsystem*

We analysed interviews, website and promotional texts, and membership rosters (when available) to construct a map of the coalition relationships within the policy

subsystem. The relative size and relationships between the coalitions in the study are shown in Figure 1.<sup>2</sup>

The lead policy actors in C1 and C2 represented large capacity-building umbrella organizations. Each of their memberships are heterogeneous and united by broad, capacity-oriented policy core beliefs. The two coalitions are distinct because C1 focused on strengthening the non-profit sector as a whole to create positive social impact (in a tide that rises all boats approach), whereas C2 focused on strengthening the non-profit organization to improve service delivery and thus create positive social impact. One focused on improving social impact indirectly by strengthening the sector, whereas the other focused on improving social impact more directly by strengthening the organization. This is illustrated by the membership of these two coalitions, which not only overlap with each other, but also

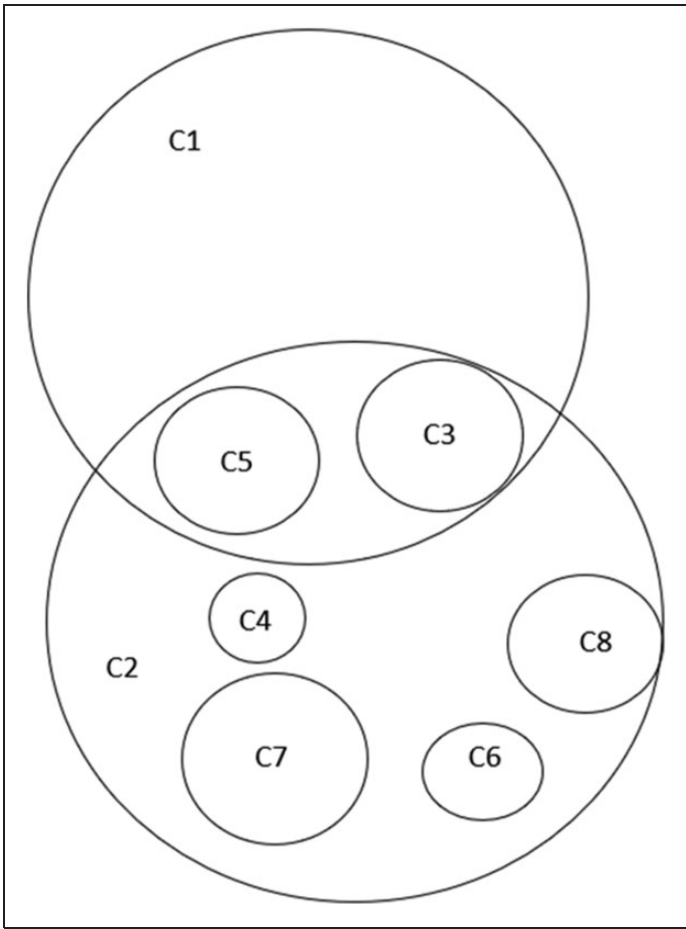


Figure 1. Coalition subsystem relational map.

with several smaller coalitions. These smaller coalitions are often united around a subsector-specific set of policy core beliefs, such as resolving generational poverty and crime by targeting a particular generation of society, such as youth. Though there is some degree of membership overlap between the smaller and more narrowly tailored coalitions, it is much less common than overlap with the larger and broader coalitions.

### *Data collection and analysis*

We conducted semi-structured, long interviews (50–70 minutes) with principal coalition actors regarding their coalitions' experience with the Illinois Budget Impasse. These eight coalitions represented over 1100 human service charities in Illinois. Interviews occurred from August to November 2017, immediately following the budget impasse conclusion. Conducting the interview post-crisis provided opportunity for the interviewee to reflect on the entire experience. The interview opened with a grand tour question (Spradley, 1979) asking the interviewee to, "Describe a time when you first felt the impact of the budget impasse." The interview emphasized the coalition leader's policy advocacy. Though the interviews directly addressed the three-year budget impasse, each coalition actor related their experience to policy advocacy during the national recession in 2008 and the reduction in human services spending in Illinois beginning in 2011. Interviews were recorded using a web-conferencing software, professionally transcribed, and then analysed in Nvivo.

Secondary sources of data were examined to triangulate and provide additional context to the interview data. These data include promotional materials, archival tax and financial information, court/government documents, and news articles. Organization websites and promotional materials were aligned with policy goals and beliefs. IRS Form 990s and organizations' annual reports confirmed income, membership, and staff size. This information was used to gauge organizational changes described in the interviews. Statements about funding parameters and previous court decrees were triangulated through government and court documents. News stories from the *Chicago Tribune* and local newspapers provided insight into the timeline of events and policymakers' actions during the impasse. All these data sources were used to identify policy core beliefs, resources, and strategies.

Intercoder reliability tests were conducted throughout the coding process. Using Nvivo coding comparison tools, we identified coding disagreements between authors and each was thoroughly discussed, aligned or new codes were developed to capture emerging storylines. Axial and selective coding stages were completed as a team through the creation of shared analytic memos.

Method of difference was used to group and compare venue choices and coalition resource usage by the eight coalitions expressed in the interviews and present in the secondary data. In an iterative approach, we sorted the coalitions into groups representing their differing actions and advocacy efforts.

Coalitions – who all began in the same legislative venue before the impasse – were grouped by venue shift choices during the impasse and cross-compared to identify coalition resources linked to differing venue shift choices. Coalition resources (Sabatier and Weible, 2007) were operationalized, as presented in Table 3, in order to ensure consistency in coding and thus enhance reliability.

Despite the rigour of the authorship team, limitations to the study persist. First, though regional budgets exist across the world, the intricacies of advocacy and process will differ across not only countries, but regions within a country. Therefore, the use of the State of Illinois is insightful and transferable to like governmental systems, but not universally generalizable. Additionally, this approach uses the interviews of umbrella organizations as a primary tool. A total of 31 interviews were conducted for a larger project analysing the 2015–2017 Illinois budget impasse, including multiple direct service providers represented by each coalition. However, the direct service providers added little context to the advocacy efforts as those interviewees spoke more about strategies for survival and community impact. These interview transcripts were used to confirm information provided by coalition principal actors. Similarly, interviews with government workers and elected officials would have provided different perspectives within this policy system but were not included as a focus in this study.

## **Applying the ACF in a policy implementation crisis**

### *Identifying coalition resources and strategies*

We found substantial evidence of ACF coalition resource usage in the study; a crosswalk between the classical descriptions and case-specific operationalization can be seen in Table 3.

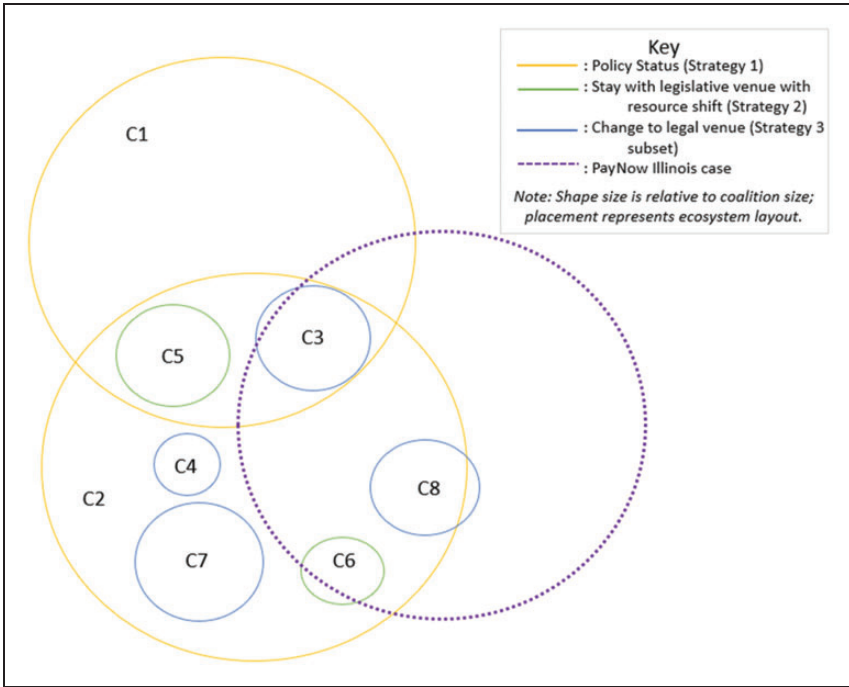
Three broad courses of action emerged as the impasse evolved: policy stasis, a fresh approach in the legislative venue, and a shift to the legal venue, which are displayed in Figure 2. The data indicate that ACF coalition resource usage, rather than previous coalition behaviour, drove venue selection. Each coalition participated in the venue and approach where they anticipated their unique resources would be the most effective (Nohrstedt and Weible, 2010; Zohlnhöfer, 2009). Financial resources were relatively benign in their impact on strategy selection, but other resources gained or lost emphasis in different ways. Table 4 presents both the key resources used by each coalition, in addition to whether that coalition pursued a venue shift.

The two largest coalitions remained largely inert regarding any intensified efforts specifically addressing the payment issue (Strategy 1, shown by yellow circles in Figure 2). Two coalitions opted to remain focused on legislative efforts with a different approach (Strategy 2, illustrated by green circles in Figure 2). This legislative strategic focus was not universal.

Four coalitions chose to shift the venue for payment advocacy from the legislature to the court system. As the budget was continually delayed, a new coalition

**Table 3.** Coalition resource definitions and operationalization.

Coalition resources	Definitions (Sabatier and Weible, 2007, p. 201, 203)	Operationalization
Formal legal authority to make policy decisions	“Actors in positions of legal authority,” including “agency officials, legislators, and some judges.”	<ul style="list-style-type: none"> <li>– Identification and targeting of individuals with legal authority</li> <li>– Recognition of obstacles and potential resolutions to decision-making authority</li> <li>– Existing contracts and documents with authority, such as decrees</li> </ul>
Public opinion	Public support for a coalition’s policy position that can sway decision-makers.	<ul style="list-style-type: none"> <li>– Reports of public support or lack thereof</li> <li>– Numbers of donors and volunteers</li> <li>– Portrayal and coverage in newspapers and mainstream media</li> </ul>
Information	Information “regarding the problem severity and causes and the costs and benefits of policy alternatives” used to solidify membership, sway decision-makers and public opinion.	<ul style="list-style-type: none"> <li>– Existence of references for informing and educating purposes</li> <li>– Possession or development of knowledge or lack thereof, particularly regarding the budgetary process</li> <li>– Changes in how information is communicated to different audiences</li> </ul>
Mobilisable troops	“Members of the attentive public who share their beliefs” and participate in demonstrations and political and financial campaigns.	<ul style="list-style-type: none"> <li>– Members of the coalitions</li> <li>– Individuals not in coalition leadership, but active in promoting the coalition</li> <li>– Community partners</li> <li>– Activities designed to motivate or activate “troops”</li> </ul>
Financial resources	Money can be used to leverage other resources, such as information gathering and production and support of legislators and public opinion.	<ul style="list-style-type: none"> <li>– Self-reported coalition financial conditions</li> <li>– Asset and revenue information from Form 990 and archival information</li> <li>– Degree and type of government funding</li> </ul>
Skilful leadership	Policy entrepreneurs “create attractive vision for a coalition, strategically use resources efficiently, and attract new resources to a coalition.”	<ul style="list-style-type: none"> <li>– Presence and action of leaders within the coalition, whether individual or organizational</li> <li>– Presence and action of policy entrepreneurs outside of the formal coalition organizations</li> </ul>



**Figure 2.** Coalition subsystem relational map with venue choice.

**Table 4.** Coalition resources and venue shifts.

Coalitions within human service policy subsystem	Key coalitions resources leveraged	Venue change
C1	Mobilisable troops	No change, but some members did change
C2	Information	No change, but some members did change
C4	Skilful leadership; information	Pushed for new legislation and stopgap funding
C5	Information	Stopgap funding, some joined lawsuit
C3	Mobilisable troops	Yes, judicial (Pay Now Illinois) and stopgap
C6	Mobilisable troops	Yes, judicial (Pay Now Illinois)
C7	Skilful leadership	Yes, judicial (Medicaid decree)
C8	Skilful leadership	Yes, judicial (Ligas consent decree enforcement)



emerged representing human and social services: Pay Now Illinois. This merged-coalition sued the State of Illinois for breach of contract, or failure to implement adopted policy represented by the contracts which still mandated service delivery on behalf of the non-profits. Further, two additional venue shifts to the courts emerged that did not involve Pay Now. These coalitions leaned on past wins in the court system, rather than new lawsuits, to force the State to allocate their funding dollars; they are shown in Figure 2 as blue circles that are not contained in the purple oval of Pay Now. Regardless of venue, however, a move away from individual mission-related issues and towards a common enemy – the State of Illinois – was observed throughout the interviews with the principal coalition actors. Coalitions continued to educate the public and turn to the public for fundraising, but coalitions shifted their policy activities directly towards policymakers and venue choices.

Unlike traditional policy scenarios where ACF is applied, here the framing contests were not effective in forcing the State's hand in this variation of policy change because the coalitions were no longer competing with each other. Additionally, the coalitions were receiving implicit and explicit feedback that their traditional methods of employing coalition resources were ineffective at solving the impasse.

### *Leveraging coalition resources*

We found that three of the resources – financial resources, strategic leadership, and information – all played a formative and *ex ante* role in the strategy selection. Public opinion, legal authority, and mobilising troops were to some degree reactive to the first three resources; though a coalition may have a very good idea of the role that resource would play, these latter three were acted on by the initial three resources. This is particularly true in regard to information, since the content and target of messaging was crucial in strategy selection. The venue choice and resource leveraging are operationalized according to resource in Figure 3. This figure denotes changes from the pre-crisis approach by a change in font colour and, where applicable, text.

*Strategy 1: Policy stasis.* The two largest and broadest coalitions in the policy subsystem neither altered their approach nor increased legislative advocacy targeted at overcoming the impasse. Since these two coalitions contained all or pieces of smaller coalitions, the inertia is not surprising given that broad agreement on primary policy values is certain (the state should pay non-profit agencies the contractually obligated amount), but views on secondary policy beliefs may be more heterogeneous. These larger coalitions had already chosen a mix of coalition resources in which to specialize, and there would be a significant cost in trying to shift away from their developed specialty. They also did not perceive a generalized reduction in funds as a shock. Reductions were viewed as a chronic threat (Weible and Ingold, 2018) from state funders who had been reducing human

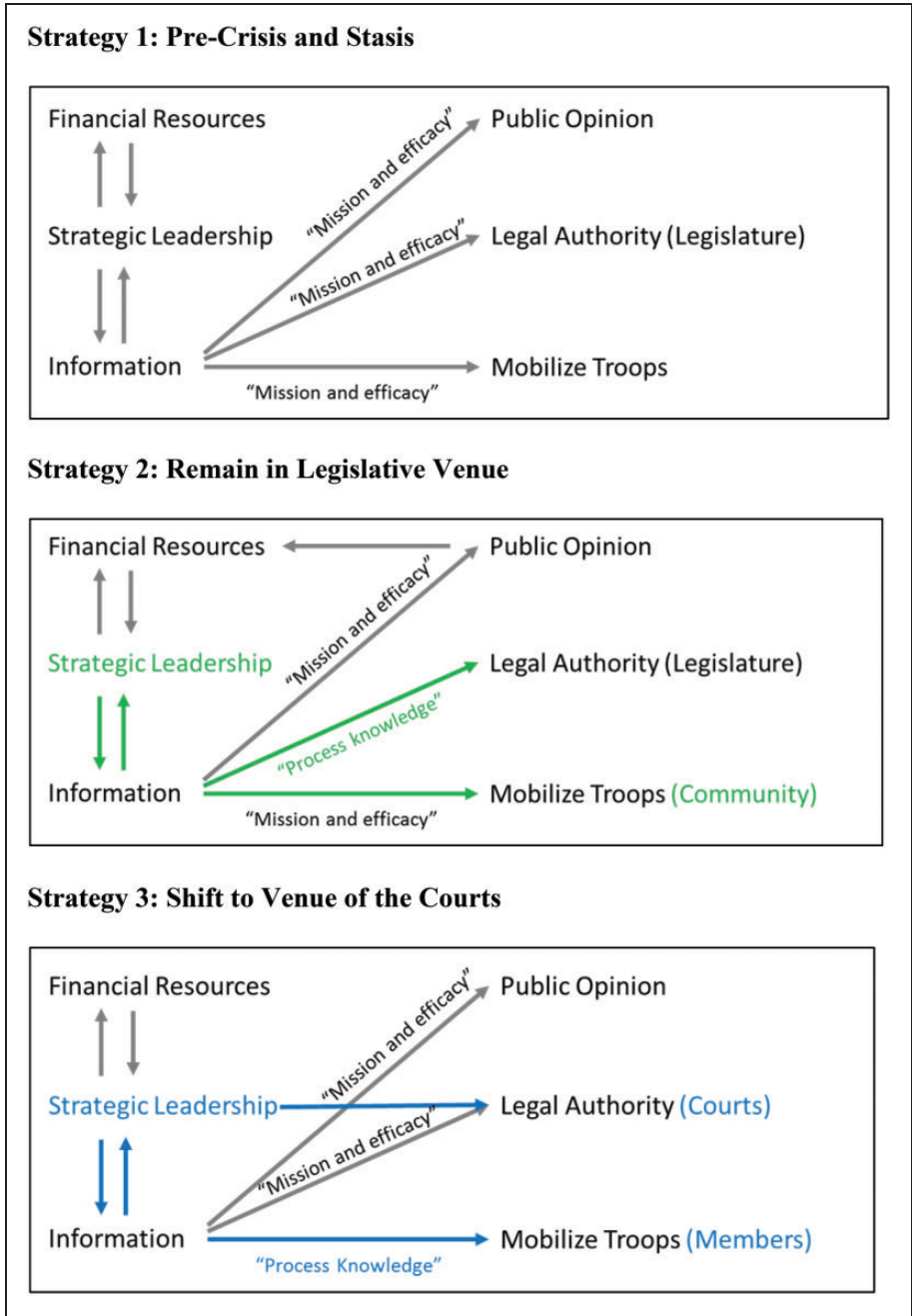


Figure 3. Strategic use of coalition resources by venue.

service funding since The Great Recession. Throughout the interviews, these policy actors contextualized this budget impasse as part of an ongoing assault on human services.

Though the reduction in funding was the new normal for these coalitions, however, the actual withholding of funds was unexpected. There was a larger degree of using words such as “dumbfounded” and “unchartered” to describe the leadership in this group, but these sentiments were mixed in with descriptions of leaders who were “very experienced with advocating for their causes and building relationships and really influencing how legislators are able to move agendas.” Skilful leadership did not appear to be lacking, but it did not appear to be innovative, sticking instead to what it knew. For example, one coalition promoted their “open tent” approach and forged an identity on being more neutral and data-driven regarding the importance of their coalition’s mission and how they measured mission achievement. They leveraged this into an optic of industry-wide source of quality information on the content of messaging that was most often employed by all members of the study in pre-crisis times. If they chose to realign their coalition’s resources, there was the possibility that they would lose their established value-added to the sector.

Policy stasis does not imply inaction; on the contrary, both coalitions continued in the approach to which they were accustomed with even higher effort. During this time period, C2 developed a reputation for providing aggregated data that would then be used by other coalitions to advocate. This continued to be the case during the budget impasse, with several data-intensive efforts coming out of C2. Meanwhile, C1 leveraged the member outreach and coordinative role that it had become known for as a multi-sector coalition and intensified that effort.

Both of the coalitions that opted for stasis had the most to say compared to other coalitions around mobilisation topics involving collaboration, mergers, and partnership with the business community. As the largest coalitions, it is not surprising that they would serve as hubs for such efforts, nor that they would want to continue doing so. However, neither of the Stasis coalitions made any mention of legal authority resources or the possibility of a venue shift, instead preferring to keep the conversation familiar in the face of uncertainty.

*It’s our responsibility to keep telling our story, telling what we do, the impact we bring on each community, community by community, and with that we need to bring the business leaders along with us. We will be much better to see if the business leaders are speaking out on behalf, right? So that’s our job.*

The consistency of the approach – communicating the importance of the mission and the abilities of non-profit agencies – with members of the coalition, the legislature, and the public is the hallmark of this strategy.

**Strategy 2: Fresh legislative approach.** There was second strategy which remained in the legislative venue; however, the coalitions utilized their resources in a much

different fashion. Information remained crucial, but the message and targets shifted, as illustrated in Figure 3. This is because the coalitions realized that, even though their policy authorities agreed with the importance of the coalition's core values, the legislators did not understand the intricacies of the budget process. This is not to say that the legislators did not understand that the payments were not getting through; rather, many did not grasp their role in the process between the encumbrance or allocation of funds and the disbursement of funds, which are different steps in the budgetary process.

*[W]e really have a hard time helping the individual legislatures understand the complexities of that budgeting and what happens once it gets out of their hands. So once the legislature passes a budget, they don't have a clue what happens over in the individual departments and all of the various things that have to happen there.*

Indeed, both coalitions made the concerted shift in messaging away from the traditional importance of mission and toward the inclusion of logistical details on the budget process in their messaging to their legal authorities. The coalitions taught elected officials the structure of their budgets. Coalition actors explained the nuances of how dollars were split between multiple levels of government and various departments within each level. They explained that their programs were built upon reimbursement structures. This was a challenging feat given that they were only permitted short visits with their representatives.

*[W]e were very careful in regard to our messaging so that we were communicating the proper information to the General Assembly to explain to them, which we found many of them were maybe not as aware as (I don't know if I should say that) they should have been. And so when they were educated...at that point in time I think it was an eye opener...the federal funds that were being tied up as a result of the budget impasse were essentially going to be lost because at the end of the day if funds were not expended, they would have to be returned to the federal government.*

Importantly, however, their messaging to the public did not shift. Remaining in the legislature meant that the constituents of the elected officials still needed to be reminded of the importance of the mission and the effectiveness of the non-profit organizations so that they would motivate their elected official to learn. This meant the continued mobilisation of community troops.

A necessary step in making this shift was having the skilful leadership capable of recognizing the ineffectiveness of the pre-crisis approach and ability to develop a new one. Unlike other studies, which have focused on the linkages between coalition leaders and legal authorities, the knowledge of most importance here was procedural and managerial: the coalition leader had to recognize the messaging problem, have the informational content to package into the new message, and have the skill to communicate this detailed process information in the right ways.

Financial resources appear to be a motivating factor more than a resource. C4 and C5 were highly dependent on federal money that became mired in the state, which provided an incentive to break that specific federal money logjam. Meanwhile, the organizations belonging to C5 were included in the stopgap budget, which took place in Summer 2015 during the first year of the impasse, but left out of the stopgap budget following second legislative session ending with no budget. This was an unfortunate surprise at the time. Both coalitions seemed to view the first stopgap as the major victory, with the second being a lesser issue; this may be because the first victory validated their approach to the impasse and represented the larger hurdle. This confidence has consequences, however: C5 missed the fact that it had been removed entirely, while C4 shifted to a more low-key “re-education” approach for their advocacy on that effort. They reminded the officials about the risks of losing the federal dollars and the urgency of distribution.

The strategic choice to remain in the venue but shift resources was successful, to some degree, in the release of funds for those coalitions who participated. Those coalitions were focused on pass-through federal dollars, plus had leadership with the skills to recognize the need to shift messaging from policy core beliefs to process. This shift in information for the policy authorities (but with consistent messaging on policy core beliefs for community advocates) was the key to this legislative approach.

**Strategy 3: Shift to legal venue.** Not every organization that recognized the messaging problem remained in the legislative venue. Several coalitions took their frustration with the lack of progress and used it to shift policy venues to where they anticipated greater implementation success: the courts. This was not a shift made in a uniform way, however. A wide variety of organizations chose to shift venues to the legal system: two joined the Pay Illinois effort, one relied on an older consent decree, and one relied on a new decree regarding Medicaid funding. This Strategy involved two choices – (a) whether to pursue a legal venue and (b) which specific legal venue to pursue – and different coalition resources played different roles in the decisions.

The decision to shift venues hinged on two coalition resources: whether strategic leadership recognized the opportunity and whether the coalition could mobilise enough coalition member support to achieve the shift (shown in Figure 3 as “Mobilise Troop (Members)”). On the former, the leadership in many of the coalitions expressed the same sort of disillusionment as those coalitions who opted for Strategy 2; however, this sense of disillusionment was often stronger and provided the basis for the individual to dream of taking the fight out of the legislature.

*[W]e tried to be very persuasive on the policy front. And what we found that nobody really quibbled about the policy issue. In a way, the insight was realizing that we were fighting with weapons that weren't going to be useful because it was the wrong... we were using the wrong tools. I'm mixing my metaphors here. But we were bringing spoons to a gunfight basically.*

So rather than change the information and keep the legislators as the policy authority target, Strategy 3 coalitions took their case to the courts. This venue shift provided a route to possible relief that both had precedent and was a venue which already specialized in process knowledge – the coalitions just had to bring their dilemma to that process.

This shift of venues, however, did require a mobilisation of troops in a way unlike previous policy options: the leaders had to convince coalition member agencies that a venue shift was the correct thing to do. So additional resources had to be dedicated to mobilisation of what could normally be considered a core group.

*[T]hey wanted a critical mass to say that a few individual providers wouldn't be singled out for retribution. They charged us with finding a way to finance the work that we would do with the lawyer and put together a public relations effort so that we weren't blamed, that it didn't backfire on us.*

Once convinced, however, the mobilised coalition members provided legitimacy and enthusiasm for the venue shift. Additionally, the relative success of Strategy 3 meant that the possibility of a venue shift served as its own unique approach of inspiring the legislators to perform well.

*That might be a way that messaging has shifted or had shifted. As opposed to maybe sponsors or key legislators saying we have to do this because it's the right things to do. We have to do this because otherwise the courts have already indicated they are more than willing to step in and do our jobs for us, and we may not like what they decide.*

Financial resources played a large role in determining which legal venue to pursue, but not whether to shift to the legal venue. For example, C3 received some stopgap funding and attributed some of their ability to be organized for Pay Now Illinois to that injection of cash; their success in the legislative arena did not prevent them from seeking full relief through the broad legal venue organized under Pay Now Illinois. On the other hand, the majority of C9's members are heavily dependent on Medicaid. This means that they had the ability to serve the specific needs of their coalition by concentrating on the legal venue related to the Medicaid-related consent decree from previous years without targeting the unwieldy mechanics of the entire budget. So, the importance of financial resources did not stem from how they were utilized for purposes of advocacy, but rather whether those finances offered opportunity or direction to pursue particular legal options.

## **Discussion and conclusions**

The components and dynamics of the advocacy coalition framework are useful tools in understanding the strategies employed by coalitions of non-profit entities in response to an exogenous shock. The 2015–2017 Illinois budget impasse resulted in a lack of a human services budget; therefore, policy actors engaged within their

respective coalitions and cooperatively across coalitions to protect their programs. They were forced to advocate for attention and resolution despite the contractual policy “win.” Beyond providing practical knowledge to researchers and practitioners on surviving similar crises, this study contributes to the application of ACF theoretically. The findings answer the call of recent ACF scholarship to establish practical and unique relationships between the six categories of coalition resources (Fyall and McGuire, 2015; Jenkins-Smith et al., 2014; Nohrstedt and Weible, 2010; Pierce et al., 2017b; Sabatier and Weible, 2007; Weible et al., 2011).

Coalitions made up of human service providers and their stakeholders strategically exploited one group of resources to harness a second set of resources as presented in Figure 3. Resources were not used independently. Nested coalitions temporarily evolved while sharing coalition-level (Weible et al., 2019) resources (information, strategic leadership, and financial resources) to access other resources (formal legal authority and mobilisable troops). The findings support Nohrstedt’s (2011) argument that leveraging the appropriate resources was more effective than the sum of all resources and support the idea that government funded organizations lean on both insider advocacy tactics (direct lobbying and meeting with legislators) and outsider tactics (protests, grassroots mobilisation, and public education) depending on their value at the given time (Fyall and McGuire, 2015).

Information usage was a key distinction between the three strategies identified within the data. It played the most influential role because the experience was new to all actors engaged. We found that scientific and technically oriented information tied to coalition advocacy issue area became less relevant. Saliency was lost among the public quickly after the initial public outcry. The unprecedented scope of the impasse left lawmakers with limited knowledge of the impact of their inaction on publicly funded human service organizations. Coalitions leaders who were armed with appropriate information to respond to these audiences were better equipped to navigate the path to calmer seas for their respective organizations.

Coalitions mobilised their troops, but varied the information engaged depending on the makeup of those troops. The strength of the mobilisable troops depended on shared deep core beliefs that were transmitted via strategic leadership and information generation. Smaller coalitions with narrower, overlapping policy core beliefs were more agile in shifting policy-related activities. These smaller coalitions were more likely to align and mobilise their members to shift policy change strategies. This would indicate the perception of the crisis as a chronic threat (Weible and Ingold, 2018). Smaller coalitions worked to maintain or strengthen coordination of their troops. Moving to the courts was a manageable task. Larger coalitions with broader policy core beliefs lacking such agility doubled down on their existing policy-related efforts indicating weak coordination (Weible and Ingold, 2018). The data suggested that moving to a judicial jurisdiction would require excessive resources that the coalitions could not risk losing. Coalitions assessed the value of their policy-related resources and engaged them based on their assessment of the threat as chronic or as a temporary shock.



The Illinois budget impasse acted as an exogenous shock to the system, effectively halting the traditional policy cycle. Coalition members were contractually obligated to produce outputs and outcomes, and yet had no idea when they would receive payment. Due to the funding shortage, the historically proven ways to engage in policy efforts were no longer useful to coalition members. Some coalitions shifted decision-making venues in order to more effectively harness their coalition's political resources, while others maintained the status quo. There was no map for the coalitions to navigate through the prevailing storm that the budget impasse caused.

Similar internal, immediate crises (Nohrstedt and Weible, 2010) tied to state budgeting are brewing throughout the U.S. in states like Oklahoma, Kansas, and Florida as well as at the federal level; such crises are also not limited to the United States. From the Illinois human service policy subsystem, though, coalitions worldwide can learn how to leverage their resources and navigate to an effective decision-making venue to ensure that external crises do not lead to policy failure. Coalitions can mobilise their troops quickly through strategic leadership, share information to educate lawmakers, or create a pathway to the courts. Even more importantly, this study adds to the evidence that theory can be useful in navigating the actual policy environment.

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### **Notes**

1. Preliminary evidence from the second phase of this project (which involves interviews with direct service organizations) support similar findings in the study sample.
2. Exact membership of the coalitions is reserved to shield the identity of the organizations. Also, two stakeholder organizations had very similar policy positions and the same interviewee, who held or had held a position of authority in both closely linked coalitions. Therefore, we believe it is most appropriate to represent these two groups as a single coalition in the analysis.

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