

Coalition Assessment Tool

Created by Celesté Martinez, Celestial Alegría

Coalition Purpose

- Why was this coalition created?
 - Who originally convened it?
 - How has the focus shifted and/or changed over time?
- What is the current purpose of my coalition?
- Why does this coalition still need to exist?

Coalition Goals, Campaign & Strategy

- What is the current focus or campaign of this coalition today?
- What are the primary goals of the coalition for the next 6-24 months?
- What is the primary strategy of your coalition? If multiple of these below apply, how would you prioritize them?
 - Policy
 - Legislative, administrative, and/or regulatory
 - Create a new policy and/or program
 - Policy reform (amend an existing law)
 - Budgetary (acquiring government funding)
 - Combo
 - Electoral
 - Polling
 - Ballot Initiative
 - Candidate Endorsement (C4)
 - Get Out The Vote (GOTV)
 - Base building
 - Expanding engagement of most directly impacted people
 - Increasing coalition members and endorsers
 - Communications
 - Pushing a narrative on an issue
 - Education
 - Issue testing
 - Other
- Why is this your current strategy?
- How many organizations are involved in this coalition?
 - From this list, which organizations are most engaged?
- What past experience do you, your organization and/or the coalition draw upon to successfully implement your strategy?
- How else won or is pursuing a similar campaign that you can learn from?

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Coalition Infrastructure

- What is the infrastructure of this coalition? How does your coalition work together?
- What is an analogy that best describes the infrastructure of your coalition?
- What levels of engagement exist?
 - Endorsement/ General support
 - Active involvement
 - Working group
 - Leadership
- How does an organization become involved?
 - Direct Outreach- Email/ Phone Call/ 1-1
 - Ads- Google, Social Media, TV or Radio Commercial
 - Recommended coalition members
- How are organizations engaged in your coalition
 - Sign petition or form to join the coalition
 - Orientation- Session that provides overview of coalition, current goals, strategy and campaign
 - Attend coalition meetings
 - Staff
 - Staff + members
 - Attend coalition meetings and commit to working group
 - Sign a MOU- A written agreement that outlines the expectations and terms of engagement in this coalition. Also notes details of who is fiscally responsible and where any monies ought to be paid/stewarded
 - Buy-in
 - Is there a monetary cost to participate in your coalition?
 - If yes, what does this look like?
 - If not, why not? OR Has this been considered?
- Who are leads and what are their responsibilities? Chair, Co-chairs, Executive Committee
 - How was leadership established when this coalition started?
 - Who is currently in leadership and how long have they been serving in this role?
 - How sustainable are maintaining leadership responsibilities?
- Who manages this coalition?
 - Organizational staff person
 - contracted facilitator or coordinator
 - Shared organizational staff
 - Community leaders
 - Other

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- What working groups exist?
 - What does each group focus on?
 - How does each working group progress your coalition campaign and/or strategy?
 - How effective are the working groups?
 - How often do working groups convene?
 - How many hours are coalition members dedicating to participating in these working groups?
 - Are there any inactive working groups or ones that fizzled out?
 - Why did this happen?
 - What can you learn from these inactive groups to inform present and future coalition work?

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Coalition Decision Making

- How does your coalition make decisions? (Refer to 6 common types of decision making handout)
 - Majority Vote
 - Supermajority Vote
 - Consensus
 - Compromise
 - Unanimous Agreement
 - Other
- Do different methods of decision making apply to differing scenarios? Or is there one decision making method unified across scenarios?
- Who are the decision makers of your coalition?
 - How are those most directly impacted involved in decision making?
 - How often are decisions solely made by paid staff?
 - How often are decisions made based on lobbyist input?
 - How often are decisions made based on politics and/or sponsor influence?
 - How often are decisions made based on research?
- What types of decisions does your coalition make?
 - Goal setting
 - Strategy
 - Tactics/Actions
 - Communications
 - Community Engagement
 - Policy
 - Sponsors
 - Hardlines
- How do or have tensions or conflicts arise around decision making?
 - How were the tensions and/or conflict addressed or not?
 - What tools did you use or do you think you need access to best address tensions and/or conflict moving forward?
 - What supported you to overcome instances of tensions and/or conflict?
 - What are key learnings for the coalition from past tensions and/or conflict?
- What roles does compromise have in your coalition?
 - When did compromise support your coalition to move forward?
 - When could you not achieve compromise and how did this affect the coalition moving forward?