

## COALITION MEMBERSHIP ASSESSMENT

### OVERVIEW

In their efforts to carry out all of their plans, coalitions often neglect the needed maintenance that should be done for them to function smoothly. Monthly meetings, community activities, media efforts – all of these important tasks seem to get in the way of spending time on making sure things are working well in the group. Coalitions can be analogous to a car – if you drive it day-in and day-out but never stop to check the oil, change the fluids or put air in the tires, you may be in need of roadside assistance. Coalitions are the same. You may be focused on all of the things you have laid out in your action plan and are pushing hard to achieve them, but if you don't stop to check in with your coalition periodically you may be headed for difficulty.

One simple way to check in with the coalition is to conduct a survey to get feedback on what the members think about how things are going. A survey allows you to assess how well the coalition is performing in the eyes of its members. A survey can give you information on what the coalition members think is going well along with what may need improvement. This tool can provide essential information that will be useful in maintaining your coalition.

In Section 6 (Building Coalition II: Maintaining the Coalition) of the Community Tool Box (<http://ctb.ku.edu/en/table-of-contents/assessment/promotion-strategies/maintain-a-coalition/main>), the authors outline several elements that are important for a coalition to maintain: its key structures, functions, and relationships. They then break these elements out a bit more:

- Vision, mission and objectives
- Basic governance and operating rules
- Leadership
- Membership
- Division of labor, within and among the leaders and members
- Strategic and action plans, both short-and long-term
- Actions and results
- Visibility in the larger community
- Relationships among all involved

By periodically engaging the members in an assessment of how the organization is operating, the leadership can stay tuned to how it is going and assess if there are areas that need to be corrected or continued. Coalition leaders can also learn about the skills and assets each member brings so that he/she is utilized effectively to his/her strengths. A brief investment of time can ensure that your coalition is a finely tuned, high performance organization.

## COALITION MEMBERSHIP ASSESSMENT

*As part of the effort to improve our coalition, we want to assess our coalition's strengths and identify areas for improvement. All of the information you provide will be anonymous. Your responses will be combined with the responses of others in your coalition so your individual responses cannot be identified. Your honest feedback will provide the coalition leadership with information on how to improve as well as to identify member strengths and interests. For each item, please circle the number that best shows your agreement or disagreement with the statements provided. Provide additional comments if you wish.*

	STRONGLY DISAGREE	TEND TO DISAGREE	TEND TO AGREE	STRONGLY AGREE	DON'T KNOW
<b>PLANNING AND IMPLEMENTATION</b>					
1. We have a clear vision for where the coalition should be going.	1	2	3	4	5
2. We have a planning process that we use to prepare the coalition's objectives.	1	2	3	4	5
3. There is good follow-through on planned coalition activities.	1	2	3	4	5
4. Our members and staff are able to support the coalition's mission.	1	2	3	4	5
5. We have a clear process for making decisions.	1	2	3	4	5
6. Each of us has clearly defined roles and responsibilities.	1	2	3	4	5
7. The coalition provides or makes available training and technical assistance to members and other stakeholders.	1	2	3	4	5
Comments:					
<b>LEADERSHIP</b>					
8. Our coalition has strong leadership (volunteer and staff) with a clear view of our group's mission.	1	2	3	4	5
9. The coalition is sensitive to cultural issues.	1	2	3	4	5
10. There are opportunities for coalition members to take leadership roles.	1	2	3	4	5
11. The coalition members are willing to take on leadership roles.	1	2	3	4	5
12. We are willing to deal with the hard issues.	1	2	3	4	5
13. There is trust among coalition members.	1	2	3	4	5
Comments:					
<b>COMMUNITY INVOLVEMENT IN THE COALITION</b>					
14. Our coalition is able to recruit community members as active participants.	1	2	3	4	5
15. We have a diverse (occupations, ethnicity, education, etc.) coalition membership.	1	2	3	4	5

16. What organizations or community members need to be included in the coalition to increase our support? (Please list)

Comments:

	STRONGLY DISAGREE	TEND TO DISAGREE	TEND TO AGREE	STRONGLY AGREE	DON'T KNOW
--	-------------------	------------------	---------------	----------------	------------

**COMMUNICATION**

17. We use the media (social and traditional) to promote awareness of the coalition's goals, actions, & accomplishments.	1	2	3	4	5
18. There is a good flow of communication between the coalition members and coalition leadership.	1	2	3	4	5
19. As a coalition member, I feel listened to and heard.	1	2	3	4	5
20. Useful and timely information is provided on issues and available resources.	1	2	3	4	5

Comments:

**PROGRESS AND OUTCOMES**

21. We are making progress in meeting the coalition's objectives.	1	2	3	4	5
22. We show an appreciation of each other as people with differing perspectives.	1	2	3	4	5
23. As a coalition, we are able to advocate effectively.	1	2	3	4	5
24. The coalition is contributing to improving health in our community.	1	2	3	4	5

Comments:

**OVERALL APPROVAL RATING**

25. Our community is better off today because of this coalition.	1	2	3	4	5
--	---	---	---	---	---

26. What does your coalition do particularly well and should continue to do in the future?

27. What one thing would you recommend changing in order to improve how well your coalition functions?

<b>28. STRENGTHS &amp; SKILLS: What do you bring to the coalition? (Check as many as apply)</b>	
<input type="checkbox"/> Experience planning prevention programs <input type="checkbox"/> Experience advocating for policy change <input type="checkbox"/> Experience in other prevention programs <input type="checkbox"/> Experience with community organizing <input type="checkbox"/> Experience working with the media <input type="checkbox"/> Access to coalition priority populations (e.g., youth, pregnant women, minorities)	<input type="checkbox"/> Represent the viewpoint of an organization that can help the coalition meet its goals <input type="checkbox"/> Access to money, equipment, media, volunteers or other resources that will help the coalition <input type="checkbox"/> Other _____
<b>29. PERSONAL INVOLVEMENT: What can you do to help the coalition? (Check as many as apply)</b>	
<input type="checkbox"/> Speak to decision makers (local legislators, school administrators, etc.) about [issue] <input type="checkbox"/> Speak to the general public about [issue] <input type="checkbox"/> Speak to the media about [issue] <input type="checkbox"/> Participate in creating the coalition's annual work plan <input type="checkbox"/> Write letters or emails to legislators <input type="checkbox"/> Write letters to the editor or other news pieces	<input type="checkbox"/> Use my organization's influence to actively recruit new coalition members <input type="checkbox"/> Participate in creating the coalition's annual budget <input type="checkbox"/> Educate/provide an orientation of the program to new coalition members <input type="checkbox"/> Spend a fair amount of time working on the coalition <input type="checkbox"/> Other (please specify): _____
<b>30. PERSONAL INVOLVEMENT: Why are you involved in the coalition? (Check as many as apply)</b>	
<input type="checkbox"/> Interested in cause <input type="checkbox"/> Personal experience with loss due to [issue] <input type="checkbox"/> Someone invited me <input type="checkbox"/> I like the people	<input type="checkbox"/> Part of my [Agency] contract, agreement or MOU <input type="checkbox"/> I like what the coalition does <input type="checkbox"/> I live in the community that is served by the coalition <input type="checkbox"/> Other _____
Comments:	
<b>31. PERSONAL INVOLVEMENT: How long have you been a member of this group?</b>	
<input type="checkbox"/> < 6 months <input type="checkbox"/> 6 months-1 year <input type="checkbox"/> 13 months-2 years <input type="checkbox"/> 25 months-3 years	<input type="checkbox"/> 37 months-4 years <input type="checkbox"/> 49 months-5 years <input type="checkbox"/> > 5 years
<b>32. PERSONAL INVOLVEMENT: Which of the following best describes how often you attend the regularly scheduled group meetings?</b>	
<input type="checkbox"/> Rarely or Never <input type="checkbox"/> Around 25% of the time <input type="checkbox"/> Around 50% of the time	<input type="checkbox"/> Around 75% of the time <input type="checkbox"/> Almost Always or Never
<b>33. PERSONAL INVOLVEMENT: About how many hours a month do you devote to the coalition (include meetings, events, planning outside of meetings, etc.)?</b>	
<input type="checkbox"/> Less than 1 hour per month <input type="checkbox"/> 1 to 3 hours per month <input type="checkbox"/> 4 to 6 hours per month	<input type="checkbox"/> 7 to 9 hours per month <input type="checkbox"/> 10 to 12 hours per month <input type="checkbox"/> More than 12 hours per month
<b><i>Thank you so much for taking the time to complete this survey!</i></b>	

## COALITION MEMBERSHIP ASSESSMENT TEMPLATE INSTRUCTIONS

*Note: The terms “coalition” and “organization” are used interchangeably in these definitions. The intent is that the template can be used by a wide variety of organizations – not just coalitions.*

This tool gives you the ability to get feedback from coalition members on how well the coalition is performing in five areas: 1) planning and implementation, 2) leadership, 3) community involvement, 4) communication, and 5) progress and outcomes. The survey also offers the members the opportunity to provide an overall approval rating for the coalition and uses open-ended questions to assess what the coalition does well and what needs to be changed. The tool also asks several questions regarding how engaged members are in the coalition. These questions range from asking about the strengths and skills they bring to the coalition to questions about the length of time they have participated as a coalition member.

The most important thing about the survey is that it gives your coalition vital information on what it is doing well and what needs to be improved. The results should be used as a tool to guide the coalition as it reflects on its progress and makes plans to improve on the way it functions.

### Question Categories

The following are the categories of questions included in the assessment along with a brief description of what kind of information can be obtained from them:

- Planning and Implementation: These questions focus on how well the coalition has expressed its vision and has developed a planning and implementation process to help the coalition move toward achieving that vision. This section of questions also assesses the coalition’s ability to function effectively and efficiently and to engage its members through training opportunities.
- Leadership: These questions focus on how well the coalition is led and whether there are opportunities for members to move into leadership roles. The questions also provide insight into the organizational climate of the coalition: is it culturally sensitive, decisive, and trusting?
- Community Involvement in the Coalition: This section assesses member perceptions on how well the coalition recruits a diverse mix of community members.
- Communication: These questions focus on how well members perceive the coalition communicates – both internally and externally.
- Progress and Outcomes: The final section gauges member perspective on the coalition’s progress towards meeting its objectives, effective advocacy and in making a difference in the community. These questions also address issues of respect and appreciation.

### Survey Design

The survey is designed in two parts. The **first part** of the survey consists of five sections (24 questions) which consist of two or more statements regarding the coalition. Respondents are asked whether they agree or disagree with each statement. Response options include the following: strongly disagree, tend to disagree, tend to agree, strongly agree, and don’t know. The responses are scored such that the

higher the score, the more agreement there is to the statement. At the conclusion of each section, respondents have the option of adding comments. There is also an overall approval rating for the coalition with two open-ended questions addressing issues of what the coalition is doing well and what needs to be improved. The **second part** of the survey asks respondents about what they bring to the coalition as well as gauges their personal involvement in the coalition and its work (6 questions). The survey can be completed online or it can be used as a paper survey distributed at a coalition meeting. The survey takes less than 10 minutes to complete.

There are no right or wrong answers. The survey is designed to get member opinions about the coalition and its functioning. It is important to get as much survey participation as possible in order to have a complete picture of member perceptions of the coalition. It is best to collect the information anonymously to spur the respondents to answer honestly and obtain the best possible data. By providing respondents anonymity, they will feel more confident in providing honest feedback.

### **Calculating Your Results**

Attached is a template that can be filled in with the survey results to summarize the findings. Instructions for filling out this template are below.

For the scale questions (**Q1 – Q24**), calculate the average score for each question using the following point values:

- Strongly disagree = 1
- Tend to disagree = 2
- Tend to agree = 3
- Strongly agree = 4
- Don't know – do not include this when calculating the average score.

For the “Strengths and Skills” and “Personal Involvement” questions (**Q25 – Q30**), calculate the number of coalition members selecting each response option, as well as the percent of the total survey respondents this number represents. Note that “total respondents” may be greater than the number of actual respondents due to the “Check as Many as Apply” instruction. Some respondents may select more than one response.

For the Open-Ended Questions and Other Comments by Section, transfer responses over to the appropriate location on the summary form.

### **Interpreting Your Results**

It is likely that you will have some scores that are high and scores that are lower. This is not unusual. Most coalitions do not function perfectly, and this assessment can help identify potential areas of need. As a rule of thumb, here is some guidance on interpreting the scores:

If a question's average score is....

- 3.5 or higher, this is an area of strength that probably doesn't need special attention.
- 2.5 to 3.4, this is a borderline area that should be discussed by the group to determine what level of attention needs to be devoted to improving it.
- 2.4 or lower, this indicates an area of concern that should be addressed.

In addition, questions receiving many "Don't Know" scores may indicate the need to discuss with the group further to determine why members cannot comment on these areas.

Here are a few other suggestions to consider as you are reviewing the results:

- Look at the 3 or 4 highest scoring questions; these may represent strengths that your group can draw on to sustain collaboration
- Look at the 3 or 4 lowest scoring questions; these may represent areas where your coalition has an opportunity for growth

### **Sharing the Results**

Once you have collected the information, it is a good idea to present the results to the coalition. One of the main values of this type of coalition assessment is that by sharing results with the members, there is an opportunity to engage them in a discussion about strengths, weaknesses and how to move the coalition forward. This information can be a powerful tool to make your coalition even more successful and help achieve your goals.

Attached is a template that can be filled in with the survey results to use in presenting the information to your coalition.

### **Where Do We Go From Here?**

If your survey results indicate that there are issues that should be addressed, there are numerous resources to help. The **Coalition Assessment Resources** list provides several useful resources to assist your coalition's efforts. One great resource noted in that list is Coalitions Work (<http://coalitionswork.com/resources/tools/>). It offers an extensive number of practical, coalition-tested tools such as downloadable checklists and other resources that can help jumpstart your coalition's problem-solving.

Another very useful resource to consider if there is conflict in your coalition is *Reaching Higher Ground: A Guide for Preventing, Preparing for, and Transforming Conflict for Tobacco Control Coalitions* ([http://ttac.org/services/pdfs/Higher\\_Ground.pdf](http://ttac.org/services/pdfs/Higher_Ground.pdf)). Developed by the Tobacco Technical Assistance Consortium, this guide provides practical advice for ways of working in coalitions and partnerships that resolve real problems while strengthening relationships. The tools and strategies described in this document can make any collaborative undertaking more successful by approaching problems and people in ways that impart dignity and respect.

## COALITION MEMBERSHIP ASSESSMENT SCORING SUMMARY

### Scale Questions

	# Responses: Don't Know	# Responses: Strongly Disagree (1)	# Responses: Tend to Disagree (2)	# Responses: Tend to Agree (3)	# Responses: Strongly Agree (4)	AVERAGE SCORE
<b>PLANNING AND IMPLEMENTATION</b>						
1. We have a clear vision for where the coalition should be going.						
2. We have a planning process that we use to prepare the coalition's objectives.						
3. There is good follow-through on planned coalition activities.						
4. Our members and staff are able to support the coalition's mission.						
5. We have a clear process for making decisions.						
6. Each of us has clearly defined roles and responsibilities.						
7. The coalition provides or makes available training and technical assistance to members and other stakeholders.						
<b>LEADERSHIP</b>						
8. Our coalition has strong leadership (volunteer and staff) with a clear view of our group's mission.						
9. The coalition is sensitive to cultural issues.						
10. There are opportunities for coalition members to take leadership roles.						
11. The coalition members are willing to take on leadership roles.						
12. We are willing to deal with the hard issues.						
13. There is trust among coalition members.						
<b>COMMUNITY INVOLVEMENT IN THE COALITION</b>						
14. Our coalition is able to recruit community members as active participants.						
15. We have a diverse (occupations, ethnicity, education, etc.) coalition membership.						



	# Responses: Don't Know	# Responses: Strongly Disagree (1)	# Responses: Tend to Disagree (2)	# Responses: Tend to Agree (3)	# Responses: Strongly Agree (4)	AVERAGE SCORE
<b>COMMUNICATION</b>						
17. We use the media (social and traditional) to promote awareness of the coalition's goals, actions, & accomplishments.						
18. There is a good flow of communication between the coalition members and coalition leadership.						
19. As a coalition member, I feel listened to and heard.						
20. Useful and timely information is provided on issues and available resources.						
<b>PROGRESS AND OUTCOMES</b>						
21. We are making progress in meeting the coalition's objectives.						
22. We show an appreciation of each other as people with differing perspectives.						
23. As a coalition, we are able to advocate effectively.						
24. The coalition is contributing to improving health in our community.						
<b>OVERALL APPROVAL RATING</b>						
25. Our community is better off today because of this coalition.						

**Strengths and Skills / Personal Involvement Questions**

<b>28. STRENGTHS &amp; SKILLS: What do you bring to the coalition? (Check as many as apply)</b>		
Skill	# responses	%
• Experience planning prevention programs		
• Experience advocating for policy change		
• Experience in other prevention programs		
• Experience with community organizing		
• Experience working with the media		
• Access to coalition priority populations (e.g., youth, pregnant women, minorities)		
• Represent the viewpoint of an organization that can help the coalition meet its goals		
• Access to money, equipment, media, volunteers or other resources that will help the coalition		
• Other		
<b>29. PERSONAL INVOLVEMENT: What can you do to help the coalition? (Check as many as apply)</b>		
Skill	# responses	%
• Speak to decision makers (local legislators, school administrators, etc.) about [issue]		
• Speak to the general public about [issue]		
• Speak to the media about [issue]		
• Participate in creating the coalition's annual work plan		
• Write letters or emails to legislators		
• Write letters to the editor or other news pieces		
• Use my organization's influence to actively recruit new coalition members		
• Participate in creating the coalition's annual budget		
• Educate/provide an orientation of the program to new coalition members		
• Spend a fair amount of time working on the coalition		
• Other (please specify):		
<b>30. PERSONAL INVOLVEMENT: Why are you involved in the coalition? (Check as many as apply)</b>		
Why Involved?	# responses	%
• Interested in cause		
• Personal experience with loss due to [issue]		
• Someone invited me		
• I like the people		
• Part of my [Agency] contract, agreement or MOU		
• I like what the coalition does		
• I live in the community that is served by the coalition		
• Other (please specify):		

<b>31. PERSONAL INVOLVEMENT: How long have you been a member of this group?</b>		
Length of Time	# responses	%
• < 6 months		
• 6 months-1 year		
• 13 months-2 years		
• 25 months-3 years		
• 37 months-4 years		
• 49 months-5 years		
• > 5 years		
<b>32. PERSONAL INVOLVEMENT: Which of the following best describes how often you attend the regularly scheduled group meetings?</b>		
Meeting Attendance	# responses	%
• Rarely or Never		
• Around 25% of the time		
• Around 50% of the time		
• Around 75% of the time		
• Almost Always or Never		
<b>33. PERSONAL INVOLVEMENT: About how many hours a month do you devote to the coalition (include meetings, events, planning outside of meetings, etc.)?</b>		
Level of involvement	# responses	%
• Less than 1 hour per month		
• 1 to 3 hours per month		
• 4 to 6 hours per month		
• 7 to 9 hours per month		
• 10 to 12 hours per month		
• More than 12 hours per month		

**Open-Ended Questions:**

**Question 16: What organizations or community members need to be included in the coalition to increase our support?**

- 
- 

**Question 26: What does your coalition do particularly well and should continue to do in the future?**

- 
- 

**Question 27: What one thing would you recommend changing in order to improve how well your coalition functions?**

- 
-

**Other Comments by Section**

**Planning and Implementation Section Comments:**

- 
- 

**Leadership Section Comments:**

- 
- 

**Community Involvement in the Coalition Section Comments:**

- 
- 

**Communication Section Comments:**

- 
- 

**Progress and Outcomes Section Comments:**

- 
- 

**Personal Involvement Section Comments:**

- 
-

## Coalition Assessment Resources

- **CADCA: Capacity Primer: Building Membership, Structure and Leadership**

<http://www.cadca.org/resources/detail/capacity-primer>

This primer provides clear guidelines to help your coalition build the capacity needed to develop and carry out a comprehensive community plan to reduce substance abuse rates. It describes the components of a coherent plan related to your coalition's strategies and priorities for capacity building.

- **Coalitions Work**

<http://coalitionswork.com/resources/>

This website provides a wide variety of practical tools and resources devoted to helping coalitions become more successful. Many of the tools can be downloaded and are designed to be used with coalitions. This site features the work of Dr. Fran Butterfoss, one of the country's leading experts in what makes coalitions work.

- **The Community Tool Box: An Overview of Coalition Building**

<http://ctb.ku.edu/en/table-of-contents/assessment/promotion-strategies/maintain-a-coalition/main>

The Community Tool Box is a service of the Work Group for Community Health and Development at the University of Kansas. This online resource is focused on community-based organizations and coalitions and is very user-friendly. It steps the reader through the essential elements of how to make a coalition function best through coalition maintenance. This chapter discusses the importance of maintenance, what needs to be maintained, and how to maintain your coalition successfully. Extensive resources are also provided.

- **Mobilizing for Action through Planning and Partnerships (MAPP)**

<http://naccho.org/topics/infrastructure/mapp/framework/index.cfm>

Mobilizing for Action through Planning and Partnerships (MAPP) is a community-driven strategic planning tool for improving community health that was developed by the National Association of County and City Health Officials (NACCHO). This tool helps communities apply strategic thinking to prioritize public health issues and identify resources to address them. MAPP is not an agency-focused assessment tool; rather, it is an interactive process that can improve the efficiency, effectiveness, and ultimately the performance of local public health systems.

Using this Web page, users can access the entire MAPP tool, supplemental resources, and technical assistance. Information on preparing for and completing the process is organized by phase, which users can access using the links above. The "related content" toolbar contains links to additional resources such as technical assistance, case studies, related publications, and materials created by experienced MAPP users.

- **Prevention Institute: Building Cross-Sector Partnerships**

<http://www.preventioninstitute.org/tools/partnership-tools.html>

Solving today's complex health and social issues effectively and equitably is beyond the purview of any one agency, organization, or discipline. Working cross-sectorally represents a key opportunity for communities to create significant, sustainable improvements in health and equity outcomes. Prevention Institute's collaboration tools emerged from experience working in health coalitions and partnerships; they are presented for practitioners—both new to and seasoned in collaboration—who are interested in building, strengthening, and sustaining inter-sectoral partnerships designed around an integrated prevention approach

### **Publications:**

- Butterfoss, FD (2007). *Coalitions and partnerships in community health*. San Francisco: Jossey-Bass.
- Pankaj, V, Athanasiades, K, Emery, A. (2014). *Coalition assessment: Approaches for measuring capacity and impact*. Innovation Network ([www.innonet.org](http://www.innonet.org))