

THE COALITION EFFECTIVENESS INVENTORY (CEI)

Based on your experience, please complete the following inventory as a self-assessment tool to evaluate the strengths of your coalition and its stage of development. Using the assessment scheme on the instrument, place a check in the box that best corresponds to your rating of the particular characteristic. Based on your coalition's stage of development, *you might not be able to rate each characteristic.*

Take Home Lessons from the CEI

- What stage is your coalition in now?

- In what areas does your coalition excel (i.e., in which major categories did your coalition receive scores of "2")?
 - 1.
 - 2.
 - 3.

- In what areas does your coalition need to improve (i.e., in which major categories did your coalition receive scores of "0" or "1")?
 - 1.
 - 2.
 - 3.

- What *specific and feasible* steps should your coalition take to address the challenges identified in the question above?
 - 1.
 - 2.
 - 3.

COALITION EFFECTIVENESS INVENTORY (CEI) SELF-ASSESSMENT TOOL

Name of Coalition: _____

Name of Rater: _____

Date of Assessment: _____

Score: _____

| ASSESSMENT SCHEME: Check one choice for each characteristic | |
|--------------------------------------------------------------------|----------------------------------------------------------|
| 0 | Characteristic is absent |
| 1 | Characteristic is present but limited |
| 2 | Characteristic is present |
| N/A | Characteristic not applicable at this stage of coalition |

| COALITION CHARACTERISTICS | Assessment | | | | |
|------------------------------------------------------------------|-------------------|----------|----------|------------|----------------------|
| | 0 | 1 | 2 | N/A | Score 0-2 |
| I. COALITION PARTICIPANTS | | | | | |
| Lead Agency | | | | | |
| 1. Decision-makers are committed to and supportive of coalition | | | | | |
| 2. Commits personnel and financial resources to coalition | | | | | |
| 3. Knowledgeable about coalitions | | | | | |
| 4. Experienced in collaboration | | | | | |
| 5. Replaces agency representative if vacancy occurs | | | | | |
| Staff | | | | | |
| 1. Knowledgeable about coalition-building process | | | | | |
| 2. Skillful in writing proposals and obtaining funding/resources | | | | | |
| 3. Trains members as appropriate | | | | | |
| 4. Competent in needs assessment and research | | | | | |
| 5. Encourages collaboration and negotiation | | | | | |
| 6. Communicates effectively with members | | | | | |



| COALITION CHARACTERISTICS | Assessment | | | | |
|---------------------------------------------------------------------------------|------------|---|---|-----|--------------|
| | 0 | 1 | 2 | N/A | Score 0-2 |
| Leaders: (Chairs and Vice-Chairs of Steering and Standing Committees) | | | | | |
| 1. Committed to coalition's mission | | | | | |
| 2. Provide leadership and guidance in maintaining coalition | | | | | |
| 3. Have appropriate time to devote to coalition | | | | | |
| 4. Plan effectively and efficiently | | | | | |
| 5. Knowledgeable about content area | | | | | |
| 6. Flexible in accepting different viewpoints | | | | | |
| 7. Demonstrate sense of humor | | | | | |
| 8. Promote equity and collaboration among members | | | | | |
| 9. Adept in organizational and communication skills | | | | | |
| 10. Work within influential political and community networks | | | | | |
| 11. Competent in negotiating, solving problems and resolving conflicts | | | | | |
| 12. Attentive to individual member concerns | | | | | |
| 13. Effective in managing meetings | | | | | |
| 14. Adept in garnering resources | | | | | |
| 15. Value members' input | | | | | |
| 16. Recognize members for their contributions | | | | | |
| Members | | | | | |
| 1. Share coalition's mission | | | | | |
| 2. Offer variety of resources and skills | | | | | |
| 3. Clearly understand their roles | | | | | |
| 4. Actively plan, implement and evaluate activities | | | | | |
| 5. Assume lead responsibility for tasks | | | | | |
| 6. Share workload | | | | | |
| 7. Regularly participate in meetings and activities | | | | | |

| COALITION CHARACTERISTICS | Assessment | | | | |
|---------------------------------------------------------------|------------|---|---|-----|-----------|
| | 0 | 1 | 2 | N/A | Score 0-2 |
| Members (Continued) | | | | | |
| 8. Communicate well with each other | | | | | |
| 9. Feel a sense of accomplishment | | | | | |
| 10. Seek out training opportunities | | | | | |
| II. COALITION STRUCTURES | | | | | |
| 1. Bylaws/rules of operation | | | | | |
| 2. Mission statement in writing | | | | | |
| 3. Goals and objectives in writing | | | | | |
| 4. Provides for regular, structured meetings | | | | | |
| 5. Establishes effective communication mechanisms | | | | | |
| 6. Organizational chart | | | | | |
| 7. Written job descriptions | | | | | |
| 8. Core planning group (e.g. steering committee) | | | | | |
| 9. Subcommittees | | | | | |
| III. COALITION PROCESSES | | | | | |
| 1. Has mechanism to make decisions, e.g. voting | | | | | |
| 2. Has mechanism to solve problems and resolve conflicts | | | | | |
| 3. Allocates resources fairly | | | | | |
| 4. Employs process and impact evaluation methods | | | | | |
| 5. Conducts annual action planning session | | | | | |
| 6. Assures that members complete assignments in timely manner | | | | | |
| 7. Orients new members | | | | | |
| 8. Regularly trains new and old members | | | | | |

| IV. STAGES OF COALITION DEVELOPMENT | Assessment | | | | |
|--------------------------------------------------------------------------------------------------------------------------------|------------|---|---|-----|--------------|
| | 0 | 1 | 2 | N/A | Score 0-2 |
| Formation | | | | | |
| 1. Permanent staff designated | | | | | |
| 2. Broad-based membership includes community leaders, professionals, and grass-roots organizers representing target population | | | | | |
| 3. Designated office and meeting space | | | | | |
| 4. Coalition structures in place | | | | | |
| Implementation | | | | | |
| 1. Coalition processes in place | | | | | |
| 2. Needs assessment conducted | | | | | |
| 3. Strategic plan for implementation developed | | | | | |
| 4. Strategies implemented as planned | | | | | |
| Maintenance | | | | | |
| 1. Strategies revised as necessary | | | | | |
| 2. Financial and material resources secured | | | | | |
| 3. Coalition broadly recognized as authority on issues it addresses | | | | | |
| 4. Number of members maintained or increased | | | | | |
| 5. Membership benefits outweigh costs | | | | | |
| 6. Coalition accessible to community | | | | | |
| 7. Accomplishments shared with members and community | | | | | |
| Institutionalization | | | | | |
| 1. Coalition included in other collaborative efforts | | | | | |
| 2. Sphere of influence includes state and private agencies and governing bodies | | | | | |
| 3. Coalition has access to power within legislative and executive branches of agencies/government | | | | | |
| 4. Activities incorporated within other agencies/institutions | | | | | |
| 5. Long term funding obtained | | | | | |
| 6. Mission is refined to encompass other issues/populations | | | | | |