

National Heart Disease &  
Stroke Prevention Program



# Fundamentals of Evaluating Partnerships

EVALUATION GUIDE



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# Acknowledgments

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We encourage readers to adapt and share the tools and resources in the Guide in order to meet their program evaluation needs. For further information, contact the Division for Heart Disease and Stroke Prevention, Applied Research and Evaluation Branch at [cdcinfo@cdc.gov](mailto:cdcinfo@cdc.gov) or (770) 488-2560.

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## Appendix 7: Coalition Effectiveness Inventory

The following Coalition Effectiveness Inventory provides an inventory of partnership characteristics for members to use to assess the functioning of the partnership or coalition.

To use the inventory, partners should independently answer the questions and score their responses. Scores can be summarized by section and across partners to develop an improvement plan.

### 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.

Following the inventory, you can summarize strengths and opportunities for improvement.

### 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
<b>I. COALITION PARTICIPANTS</b>					
<b>Lead Agency</b>					
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					
<b>Staff</b>					
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					
<b>Leaders</b>					
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					

COALITION CHARACTERISTICS	Assessment				
	0	1	2	N/A	Score 0-2
<b>Members</b>					
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					
8. Communicate well with each other					
9. Feel a sense of accomplishment					
10. Seek out training opportunities					
<b>II. COALITION STRUCTURES</b>					
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					
<b>III. COALITION PROCESSES</b>					
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					

COALITION CHARACTERISTICS	Assessment				
	0	1	2	N/A	Score 0-2
<b>Formation</b>					
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					
<b>Implementation</b>					
1. Coalition processes in place					
2. Needs assessment conducted					
3. Strategic plan for implementation developed					
4. Strategies implemented as planned					
<b>Maintenance</b>					
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					
<b>Institutionalization</b>					
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 or institutions					
5. Long-term funding obtained					
6. Mission is refined to encompass other issues and populations					

## 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.

With permission. Butterfoss, FD.(1998). Coalition Effectiveness Inventory (CEI). Norfolk, VA: Eastern Virginia Medical School. \*\*Revised from Butterfoss and Center for Health Promotion, South Carolina Department of Health and Environmental Control (1994). Coalition Self-Assessment Tool (1994). Columbia, SC.