

Assessing Your Coalition:

A Reflection Guide

to Support

Effective, Resilient

Coalitions

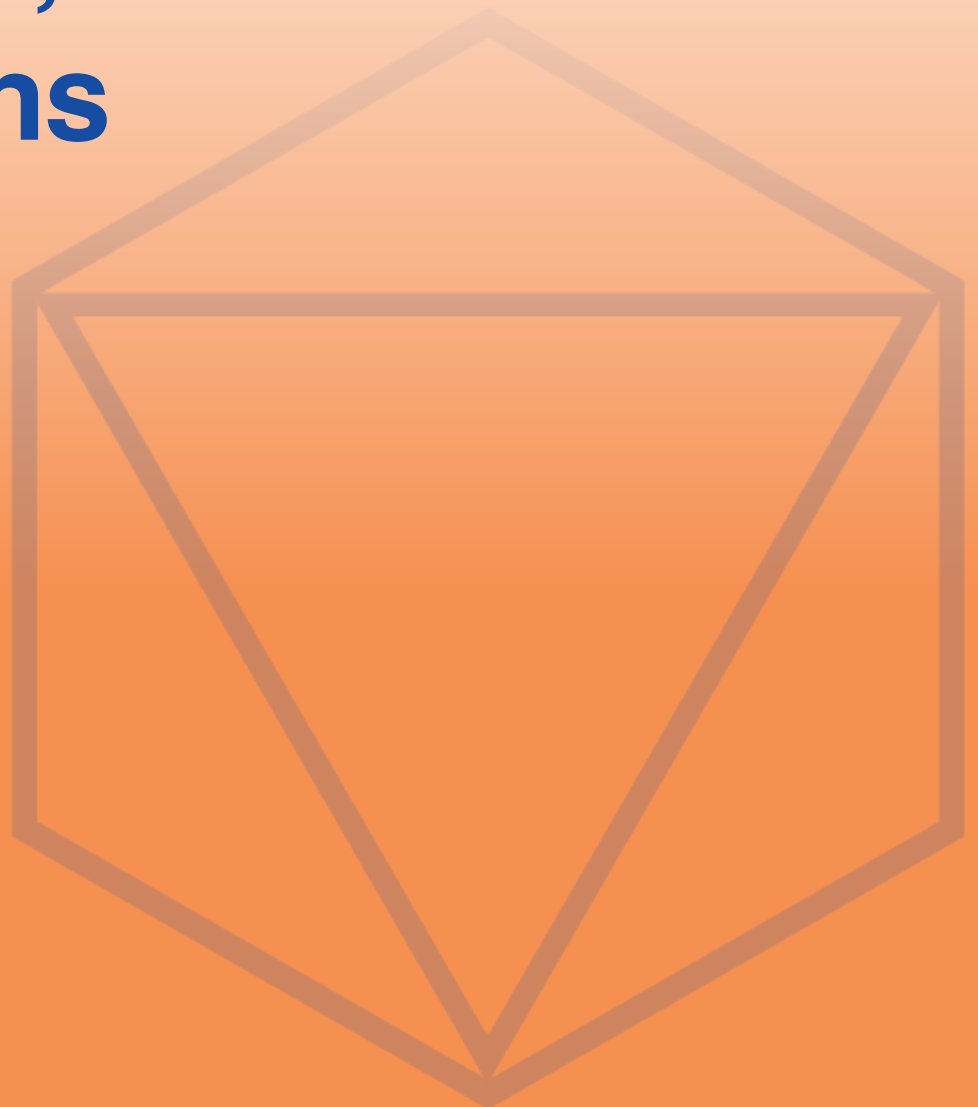


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INTRODUCTION

Purpose

This guide is intended for practitioners, funders, and others who are involved in an existing coalition and are interested in increasing their coalition's resiliency and impact. By now, you may have encountered some of the many challenges to successful coalition work, whether it's aligning behind a shared goal or maintaining relationships during tense and tiring campaigns. You may also have experienced the power of a coalition and the necessity of building alliances to win durable change for your community. But what are the common factors of successful coalitions that you can adopt, and what should you avoid?

This guide provides you with a set of best practices and questions to ask yourself to assess your coalition's strengths and challenges. We define coalitions broadly, as any group of organizations or stakeholders working together to achieve a set of goals. This guide prompts you to strengthen your coalition by thinking deeply about **key aspects of your coalition's structure – what we call *coalition architecture***.

What is Coalition Architecture?

Coalition architecture shapes how (and whether) coalitions balance power, make decisions, share information, distribute tasks, and build relationships. It's the structures, practices, and processes that help your coalition run.

Although there is no fool-proof formula for building an effective coalition, research and our own organizing experience tell us that choices leaders and members make about their coalition architecture determine whether they are able to generate the intangible resources (such as buy-in, commitment, trust, and a sense of agency among members) that make coalitions succeed (Figure 1).

Who This guide was created by the P3 Lab at Johns Hopkins University. We are a team of researchers and organizers seeking to understand how we can make political participation across race and class possible, probable, and powerful.

We This guide is a companion piece to our report, *Designing Effective Coalitions*, which summarizes existing research on what makes coalitions successful.

Are The report pulls from research on a wide range of coalition types, including political, community-based, manufacturing, and inter-governmental coalitions, and from a variety of academic fields, including political science, sociology, business management, community health, and more. Its goal is to support funders and practitioners in building effective coalitions. This guide is intended to serve as a stand-alone tool, but readers interested in diving into the research that supports it or who want to learn more about their growth areas are encouraged to check out the report at www.p3researchlab.org.

There are many decisions that go into shaping coalition architecture, but we'll look at three key building blocks: clear roles and relationships that build trust, transparent processes for sharing power through democratic governance, and feedback loops to facilitate real-time learning and flexibility. These foundational structures, when designed well, give coalition members an authentic voice, balance power within the coalition, create transparency and accountability, grow the coalition's ability to learn and adapt, and provide needed clarity around roles and responsibilities.

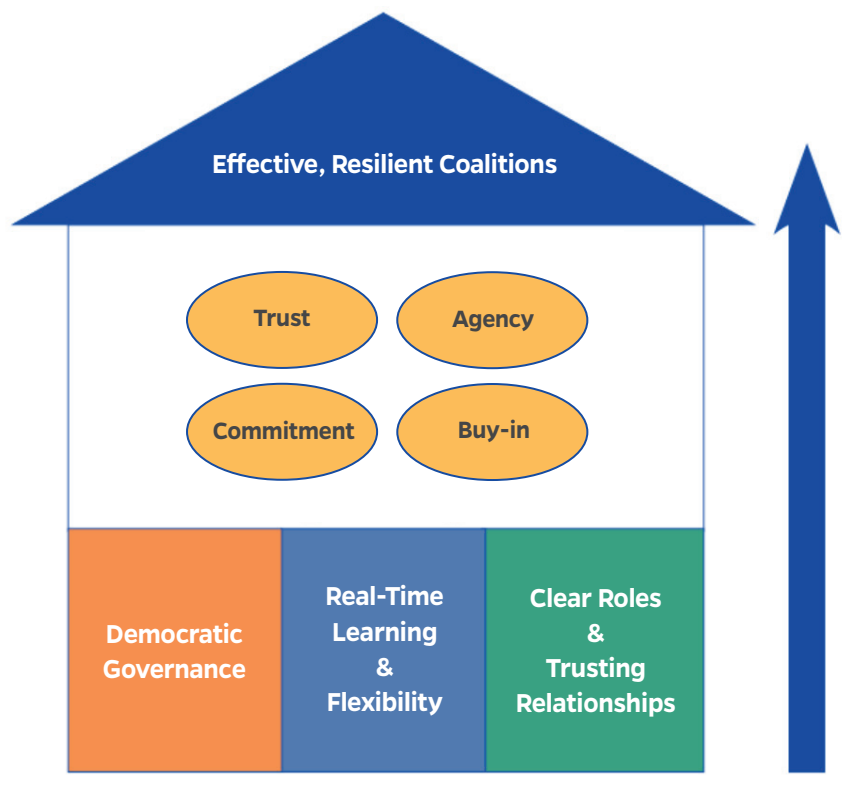


FIGURE 1.
Coalition architecture:
the building blocks of
an effective, resilient
coalition

How to Use This Guide

This guide is broken into three sections that explore a building block of effective coalition architecture:

- Clear roles and relationships that build trust
- Transparent processes for sharing power through democratic governance
- Feedback Loops to facilitate real-time learning and flexibility

In each section, we describe the building block, explain its importance, and offer a set of questions to help you reflect on that aspect of your coalition's structure. The goal is that by responding to these questions, you can assess your current coalition architecture and design stronger, more intentional practices.

Once you've answered these questions, use the scoring sheet in the "Understanding Your Responses" section at the end of this guide to better understand your coalition's strengths and weaknesses. We close by helping you to identify one to three key areas for improvement and develop next steps to strengthen your coalition's architecture. If at any point you want to dive deeper on a specific area of coalition design, check out the corresponding section of the *Designing Effective Coalitions* report at www.p3researchlab.org.

Once your coalition becomes more established, you can use P3's guide for existing coalitions ("Assessing Your Coalition: A Reflection Guide to Support Effective, Resilient Coalitions") to continue to build out your coalition architecture. We encourage you to see solid coalition architecture as an ongoing process rather than a one-time activity. As your coalition grows, use that guide to track your coalition's progress over time and reevaluate areas for growth.

Finally, we want to be clear that the goal of this guide is to figure out the most effective coalition design for your unique context! Many coalitions succeed without putting into place all the processes and practices described here. Some areas are more important for one coalition than for another. So, rather than a rigid checklist, this guide provides prompts to help you think deeply about your new coalition's architecture and to push you toward practices that can build buy-in, commitment, trust, and agency among your coalition's members.

If you have feedback on how to improve this guide or would like to discuss how to use it with your coalition, please contact Jane Booth-Tobin at jboothtobin@jhu.edu.

Using This Guide

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This guide can be used for individual reflection and/or collective assessment with your fellow coalition members. For example:

1. You can read through the guide and answer the assessment questions yourself to identify areas of your coalition that need greater thought or attention.
2. You can ask other stakeholders within your coalition to answer the assessment questions as well, and then discuss your responses together.
3. To assess whether different types of stakeholders view or experience the coalition differently, you can compare the scores of different types of stakeholders. For example, are funders more likely than organizations to think that power is distributed equitably within the coalition? What about well-funded or national coalition members vs. less-funded or local coalition members?
4. You can return to it. Developing solid coalition architecture is an ongoing process rather than a one-time activity. We encourage you to return periodically and re-grade your coalition. This will enable you to track the coalition's progress over time or reevaluate areas for growth.
5. Anything else you can think of. The guide is meant to be a flexible tool that you can use in whichever way will best serve your coalition.

Finally, we want to be clear that the goal of this guide is to identify areas of growth and to figure out the most effective coalition design for your unique context – not to receive a perfect score! It will be most useful if you and your coalition members are deeply honest with yourselves about your coalition's architecture. Many coalitions succeed without putting into place all the processes and practices described here. Some areas are more important for one coalition than for another. So, rather than a rigid checklist, this guide provides prompts to help you think deeply about your coalition's architecture and to push you toward practices that can build buy-in, commitment, trust, and agency among your coalition's members.

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REFLECTION GUIDE

Section 1: Clear Roles and Trusting Relationships

Coalitions are built around the people and organizations who are a part of them. They should begin with clear, intentional choices about who is part of the coalition.

Coalition members should have clarity around their and others' roles within the coalition (including clarity around who is and is not part of the coalition), an understanding of how they will relate to one another, and opportunities to build meaningful, trusting relationships.

Clear roles and trusting relationships are not just nice-to-haves – they are essential for creating well-functioning, resilient coalitions. Clarity around roles, as well as relationships based in trust, increase cooperation and efficiency while reducing shirking of responsibilities.

Importantly, trusting relationships don't grow out of nowhere. You need to develop practices and structures that facilitate trusting relationships. Below are some evidence-based ways to build trusting relationships within your coalition (Figure 2).

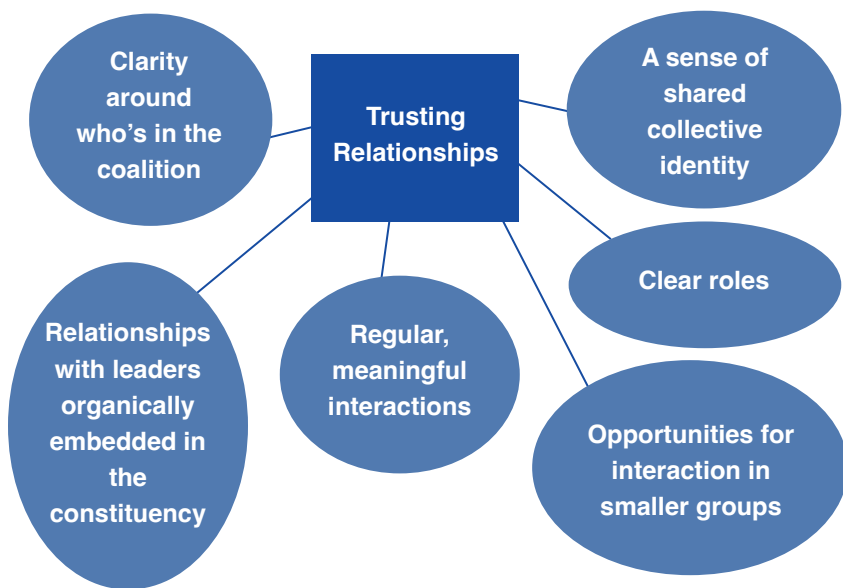


FIGURE 2.
Trusting relationships develop from decisions that coalitions make about structures and practices within the coalition.

Be Clear About Who Is and Is Not in Your Coalition

One of the first decisions that coalitions must make is who to involve in the coalition. Many times, coalition members are unclear about which groups are actually part of their coalition. Groups may float in and out. Sometimes, groups may be unclear whether they themselves are part of the coalition! To create a cohesive coalition, your coalition needs to decide which groups to include.

To help decide, **researchers recommend conducting a stakeholder analysis to identify potential coalition members and their interests.** This involves identifying 1) groups impacted by the problem that the coalition is trying to solve, 2) groups that can provide access to key resources, and 3) groups already involved in advocacy related to

the problem. Then, you need to try your best to identify each group's interests and priorities. A stakeholder analysis provides a landscape of relevant groups and helps you develop a sense of what each group's (potentially conflicting) expectations may be of your coalition's strategy and goals. This can provide needed clarity on the pros and cons of inviting each group into the coalition.

When deciding who to include, coalitions should strive for a wide range of groups. Scholars argue that you should include "a broad enough spectrum of stakeholders to mirror the problem."¹ That breadth is essential for the coalition's legitimacy, specifically its ability to claim that the coalition's demands reflect a broad-based consensus. Researchers argue that even "potentially 'troublesome' stakeholders," including those with the most power and influence, be invited into the coalition. Excluding critical stakeholders can lead to reduced efficacy and coalition failure. At the same time, coalitions should avoid including an overwhelming number of groups, or so many that coalition members can't build close relationships. For more information on who to include, see the "Establish Clarity About Who Is Part of the Coalition" section on page 17 of P3's report at www.p3researchlab.org.

Organically embed your coalition in the constituency

You don't need to start your coalition from scratch. **Instead, build the coalition from the social networks and institutions that already exist within the community.** Embeddedness within a network of relationships—rather than a single relationship, such as one between a volunteer and an organizer—is what builds commitment and group resiliency. This is built-in when you start from preexisting relationships. Also, **draw on organic leaders.** These are the people who are already well-respected within a constituency, and to whom others turn for advice and support. Organic leaders do not necessarily hold official positions and are rarely the people who are the most vocal about a political campaign or issue. They may initially hold neutral views or hesitate to get involved. But if they can be persuaded to support an issue, they can bring many others along.

Have Regular, Meaningful Interactions

Repeated interactions create the shared norms, expectations, and understandings that build trust and help coalitions to run more smoothly. In addition to consistent coalition meetings, your coalition can promote meaningful interaction by including informal opportunities to interact socially, as well as celebrating successes, big and small.

Create Opportunities to Interact in Smaller Groups

Smaller groups, like committees, allow coalition members to engage more regularly and develop personal relationships, deepening trust. They also give coalition members an ability to dive into and feel ownership over their work. Your coalition can encourage interaction in smaller groups by creating mission-oriented teams that focus on a specific part of the coalition's work. For large coalitions, this can be especially helpful to build and maintain bonds. In general, for mission-oriented teams, you'll want five or fewer people.

Create Clear Roles

A lack of clarity around roles is associated with greater tension and anxiety, lack of participation, and higher rates of turnover in organizations. Clarity about roles, on the other hand, supports adaptability, work satisfaction, commitment, and involvement. When coalition members understand both their own roles and the roles of others, they can create shared expectations around what is needed from each member to achieve collective goals.

¹ Gray, Barbara. 1989. *Collaborating: Finding Common Ground for Multi-Party Problems*. San Francisco: Jossey-Bass, page 86.

Develop a Shared Sense of Collective Identity

Collective identity is the feeling of belonging to a group, or a sense of “we-ness.” Feeling connectedness and belonging in a group improves a coalition’s functioning and ability to withstand external stressors by increasing commitment and participation. For ways to build collective identity, see the “Develop Practices that Build Collective Identity” section on page 21 of P3’s report at www.p3researchlab.org. Recommendations include practices such as defining who your coalition is as a group and identifying your shared vision and goals, discovering what you are not, sharing and comparing past and current experiences, celebrating small wins, sharing emotional responses, and participating in political activity together.

Below are assessment questions to get you thinking about the roles and relationships in your coalition and guide you toward building relationships based in trust.

Assessment Questions

Question #1

Does your coalition include “a broad enough spectrum of stakeholders to mirror the problem,” ranging from financially powerful and influential groups to community based and grassroots ones? If not, what would be the benefits of including a wider range of groups? The downsides? *[Please write your response in the space below]*

Question #2

Did your coalition conduct a stakeholder analysis to decide which groups to include in your coalition? If yes, how did it inform your coalition membership? If not, would it be helpful to conduct one now? What would that process look like? *[Please write your response in the space below]*

Question #3

Are the boundaries around who is and is not part of the coalition clear?

- ☐ 1 – Very unclear
- ☐ 2 – Somewhat unclear
- ☐ 3 – Neither unclear nor clear
- ☐ 4 – Somewhat clear
- ☐ 5 – Very clear

Question #4

Is your coalition organically embedded in the community?

- ☐ 1 – Not at all embedded
- ☐ 2 – Slightly embedded
- ☐ 3 – Somewhat embedded
- ☐ 4 – Embedded
- ☐ 5 – Very embedded

Question #5

How trusting are coalition members of one another?

- ☐ 1 – Very untrusting
- ☐ 2 – Somewhat untrusting
- ☐ 3 – Neither untrusting nor trusting
- ☐ 4 – Somewhat trusting
- ☐ 5 – Very trusting

Question #6

How often does your coalition provide meaningful opportunities to interact?

- ☐ 1 – Never
- ☐ 2 – Rarely
- ☐ 3 – Sometimes
- ☐ 4 – Often
- ☐ 5 – Very often

Question #7

How often does your coalition break larger groups into smaller, mission-focused groups?

- ☐ 1 – Never
- ☐ 2 – Rarely
- ☐ 3 – Sometimes
- ☐ 4 – Often
- ☐ 5 – Very often

Question #8

How clear are members' roles within the coalition?

- ☐ 1 – Very unclear
- ☐ 2 – Somewhat unclear
- ☐ 3 – Neither unclear nor clear
- ☐ 4 – Somewhat clear
- ☐ 5 – Very clear

Question #9

Does your coalition have practices for building a sense of belonging and collective identity, such as celebrating small wins?

- ☐ 1 - Not at all
- ☐ 2 - Slightly
- ☐ 3 - Somewhat
- ☐ 4 – A good bit
- ☐ 5 – Very much

ROLES AND RELATIONSHIPS SCORE

Add up your score from questions 3-9: _____

Section 2: Transparent Processes for Sharing Power through Democratic Governance

Coalitions are strongest when they engage in practices of *democratic governance*. What is democratic governance? It's the structures, practices, and processes that coalitions create to distribute power and give coalition members a voice. Democratic governance empowers all key stakeholders to contribute meaningfully to the coalition's direction, strategy, and future. Why is democratic governance important? It results in better decision-making; gives the coalition greater legitimacy; increases coalition members' commitment to the group; and, ultimately, leads to a better-functioning, more resilient coalition.

Democratic governance has four components: practices and processes that balance power, create a system for decision-making, generate transparency and information-sharing, and hold the coalition itself accountable to its commitments around governance (Figure 3). We discuss what these structures look like and how to create them in the following sections.

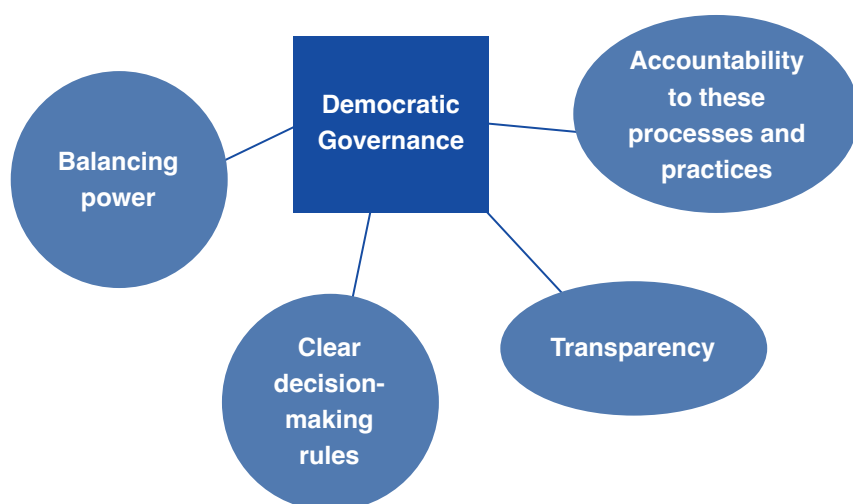


FIGURE 3.

Democratic governance is made up of practices and processes for balancing power, making decisions, generating transparency, and holding the coalition accountable to its governance commitments.

Whether you are focused on processes for balancing power, decision-making, transparency, or accountability, there are four main steps to creating democratic structures:

- *Recognize the value of developing these processes.* It can be time-consuming to create processes for democratic governance. But without these processes, coalition members may feel that their participation in the coalition isn't meaningful and may choose to stop investing their time and energy.
- *Develop these processes collectively.* When coalition members create processes together, they are more likely to buy into and commit to the processes and their outcomes.
- *Make sure that all coalition members are aware of and understand these processes.* They should be clear and easy to use.
- *Use the processes you develop consistently.* This brings clarity and predictability to the coalition's activity.

Below are descriptions of each of these processes. We discuss further why each is important and guide you toward strategies for implementing them successfully.

Distributing Power

Creating practices to distribute power within a coalition is important because, without them, power hierarchies that exist in the world are often recreated within the coalition. This can lead to distrust, tension, and conflict. Often, people and groups with more power entering the coalition end up in leadership positions within the coalition, while those with less power are marginalized. The marginalized tend to be those closest to the problem that the coalition is trying to address. They frequently have direct knowledge of the problem's impacts and effective ideas about solutions. As a result, engaging a full range of stakeholders in decision-making, including those with the least power, leads to both greater trust and better decisions.

Power is relational and dynamic, not static. Different groups bring different resources to the table that may become essential to the coalition at different times and in different ways. Resources include not only material resources and skills like lobbying, but also legitimacy within a constituency and the ability to mobilize a committed base. Often, when one group is thought of as having less power, it's because the power that they bring isn't acknowledged as such (rather than that they don't have power). For example, a group funding a coalition may be able to achieve very little without the people brought in by a grassroots group.

Coalitions can help distribute power by engaging their "least powerful" members in both small and major decisions, including those about the coalition's goals, direction, and strategy. In practice, this may look like including the least powerful stakeholders in all leadership and decision-making bodies, or even rotating leadership to ensure equal representation.

In addition to having a voice in the coalition's goals and strategy, stakeholders should have a say in the creation of the coalition's internal processes. A good rule of thumb is that all coalition members bound by internal agreements should have a say in creating those agreements.

Below is a set of questions to ask yourself and your coalition about the coalition's current power distribution and suggestions for concrete structures and practices that could more equitably distribute power.

Assessment Questions

Question #10

Does your coalition have processes that try to balance power equitably across membership? If yes, what are they? What works well about them? What works less well? *[Please write your response in the space below]*

Question #11

When it comes to major decision-making (for example, about your coalition's direction, processes, and strategy), how involved are the people closest to or most impacted by the problem that your coalition is trying to address?

- ☐ 1 – Not at all involved
- ☐ 2 – Slightly involved
- ☐ 3 – Somewhat involved
- ☐ 4 – Involved
- ☐ 5 – Very involved

Question #12

Are the least powerful stakeholders in your coalition represented in your coalition's leadership and decision-making bodies (such as committees, associations, working groups, legislative groups, etc.)?

- ☐ 1 – Not at all represented
- ☐ 2 – Slightly represented
- ☐ 3 – Somewhat represented
- ☐ 4 – Well represented
- ☐ 5 – Very well represented

Question #13

Does your coalition have structures that support equal representation, such as rotating leadership?

- ☐ 1 – Not at all
- ☐ 2 – A little
- ☐ 3 – Somewhat
- ☐ 4 – A good bit
- ☐ 5 – Very much

Question #14

In general, do people who are required to follow internal coalition processes have a say in the creation of those processes?

- ☐ 1 – No say at all
- ☐ 2 – Very little say
- ☐ 3 – Some say
- ☐ 4 – A good bit of say
- ☐ 5 – A lot of say

DISTRIBUTING POWER SCORE

Add up your score from questions 11-14: _____

Clear Decision-Making Rules

Having a clear, consistent decision-making system eases the burden of decision-making and allows all members to understand who is making which decisions and how they do so. Research doesn't identify a single best decision-making system (for example, majority rule vs. supermajority rule vs. consensus). Instead, the important thing is that you choose a decision-making system, and coalition members are aware of it, understand it, and use it consistently. Selecting and sticking with one decision-making system builds clarity and transparency around decision-making. Ideally, coalition members will choose a decision-making system together.

Assessment Questions**Question #15**

What is your coalition's system for making decisions? What works well about it? What works less well? [Please write your response in the space below]

Question #16

How developed is your coalition's decision-making system?

- ☐ 1 – Not at all developed
- ☐ 2 – Slightly developed
- ☐ 3 – Somewhat developed
- ☐ 4 – Developed
- ☐ 5 – Very developed

NOTE: If you answered "Not at all developed" to Question #16, read through questions 17-20 for guidance on how to develop your decision-making system. You do not need to answer them.

Question #17

How involved or uninvolved were stakeholders (including those with the least power) in developing your decision-making system?

- ☐ 1 – Very uninvolved
- ☐ 2 – Somewhat uninvolved
- ☐ 3 – Neither involved nor uninvolved
- ☐ 4 – Somewhat involved
- ☐ 5 – Very involved

Question #18

How aware or unaware are coalition members of your decision-making system?

- ☐ 1 – Very unaware
- ☐ 2 – Somewhat unaware
- ☐ 3 – Neither aware nor unaware
- ☐ 4 – Somewhat aware
- ☐ 5 – Very aware

Question #19

How poorly or well do coalition members understand your decision-making system?

- ☐ 1 – Very poorly
- ☐ 2 – Somewhat poorly
- ☐ 3 – Neither poorly nor well
- ☐ 4 – Somewhat well
- ☐ 5 – Very well

Question #20

How consistently or inconsistently does your coalition use your decision-making system?

- ☐ 1 – Very inconsistently
- ☐ 2 – Somewhat inconsistently
- ☐ 3 – Neither inconsistently nor consistently
- ☐ 4 – Somewhat consistently
- ☐ 5 – Very consistently

DECISION-MAKING SCORE

Add up your score from questions 16-20: _____

Transparency

The more transparent your coalition can be, the better. By making actions, information, and decisions public, transparency increases social pressure on coalition members to follow through on their commitments. Sharing information and knowledge also builds awareness of what's going on, increases the legitimacy of the coalition's work, and nurtures trust in and commitment to one another, each of which increase the coalition's ability to function well.

Coalitions don't need to overthink this. Transparency can and should be built into your daily routines through practices like the timely sharing of meeting notes or other documents through specific channels. This gives people a chance to respond and react in near real-time. Additionally, coalition members (including leadership) should regularly report out their own actions, and there should be clear processes for doing so. These practices may feel onerous at first but can go a long way toward building trust across the coalition.

Assessment Questions

Question #21

What kinds of mechanisms does your coalition use to create transparency? What works well about them? What works less well? *[Please write your response in the space below]*

Question #22

Are there decisions, tactics or processes that are not transparent within your coalition? If yes, what mechanisms can be put in place to improve transparency? *[Please write your response in the space below]*

Question #23

How developed are your coalition's practices for transparency?

- ☐ 1 – Not at all developed
- ☐ 2 – Slightly developed
- ☐ 3 – Somewhat developed
- ☐ 4 – Developed
- ☐ 5 – Very developed

Question #24

Are practices for transparency incorporated into your coalition's daily routines?

- ☐ 1 – Not at all incorporated
- ☐ 2 – Slightly incorporated
- ☐ 3 – Neither poorly nor well incorporated
- ☐ 4 – Somewhat well incorporated
- ☐ 5 – Very well incorporated

Question #25

How transparent or non-transparent is your coalition's leadership about their activities, decision-making, etc.?

- ☐ 1 – Very non-transparent
- ☐ 2 – Somewhat non-transparent
- ☐ 3 – Neither transparent nor non-transparent
- ☐ 4 – Somewhat transparent
- ☐ 5 – Very transparent

Question #26

How transparent or non-transparent is your coalition's non-leadership about their activities, decision-making, etc.?

- ☐ 1 – Very non-transparent
- ☐ 2 – Somewhat non-transparent
- ☐ 3 – Neither transparent nor non-transparent
- ☐ 4 – Somewhat transparent
- ☐ 5 – Very transparent

TRANSPARENCY SCORE

Add up your score from questions 23-26: _____

Holding the Coalition Accountable to these Governance Commitments

Coalitions need accountability and conflict resolution systems to ensure that coalition members follow through on their commitments and to support strong relationships. Researchers find that simply working collectively to develop an accountability system reduces the need to use it, because people tend to stick to it. Accountability systems improve cooperation and reduce shirking of responsibilities.

The goal of accountability systems is not to make those who violate the rules feel rejected but to incentivize people to uphold their commitments and the coalition's agreed-upon practices. To do this, your coalition can adopt a system of graduated sanctions. This means that when people or organizations first violate the coalition's community agreements, they receive mild sanctions (such as having a conversation about the violation or being named in a meeting). Repeated violations result in increasingly strong sanctions. Starting with mild sanctions allows people or organizations to make a mistake or fail to deliver on a task, recover, and be welcomed back fully into the group.

Identifying why a violation occurred and how to restore trust is another way to ensure accountability. For example, if a coalition member lobbies a legislator on a policy that the coalition had not collectively agreed upon, the coalition member may be asked to clarify with the legislator and/or required to have other coalition members join for future meetings. If there is interpersonal harm, the harmed member should be empowered to suggest accountability that feels restorative, such as having the offender take a break from the coalition or publicly acknowledge the harm caused. These processes should be relatively easy to use and should resolve problems quickly. They should be designed so that "[p]eople can get clear resolutions with minimal effort."²

² Levine, Peter. 2022. What Should We Do? A Theory of Civic Life. New York: Oxford University Press, page 124.

Assessment Questions

Question #27

Does your coalition have clear, easy-to-use accountability processes? If yes, what are they? What works well about them? What works less well? [Please write your response in the space below]

Question #28

How developed are your coalition's processes for accountability?

- ☐ 1 – Not at all developed
- ☐ 2 – Slightly developed
- ☐ 3 – Somewhat developed
- ☐ 4 – Developed
- ☐ 5 – Very developed

NOTE: If you answered “Not at all developed” to Question #28, read through questions 29-32 for guidance on how to develop your coalition's accountability processes. You do not need to answer them.

Question #29

How aware or unaware are coalition members of your processes for accountability?

- ☐ 1 – Very unaware
- ☐ 2 – Somewhat unaware
- ☐ 3 – Neither aware nor unaware
- ☐ 4 – Somewhat aware

Question #30

Do your coalition's accountability processes start with mild sanctions and move to more severe sanctions for repeated violations?

- ☐ 1 – Not at all
- ☐ 2 – Slightly
- ☐ 3 – Somewhat
- ☐ 4 – A good bit
- ☐ 5 – Very much

Question #31

Are your coalition's accountability processes focused on restoring trust and bringing people back into the coalition?

- ☐ 1 – Not at all
- ☐ 2 – Slightly
- ☐ 3 – Somewhat
- ☐ 4 – A good bit
- ☐ 5 – Very much

Question #32

Did your coalition create your accountability processes collectively?

- ☐ 1 – Not at all collectively
- ☐ 2 – Slightly collectively
- ☐ 3 – Somewhat collectively
- ☐ 4 – Collectively
- ☐ 5 – Very collectively

ACCOUNTABILITY SCORE

Add up your score from questions 28-32: _____

Section 3: Feedback Loops for Real-Time Learning and Flexibility

Learning feedback loops refer to the ability of a coalition to constantly learn and use that learning to adapt their strategy (Figure 4). In practice, this looks like:

- 1) Collecting real-time data that captures not only traditional metrics, but also data that gets at the quality of relationships and dynamics within the coalition, any changes in the political environment that the coalition operates in, and whether/how the coalition's activities affect the political landscape;
- 2) Analyzing that data;
- 3) Sharing learnings widely within the coalition, and;
- 4) Applying any insights to the coalition's strategy.

The purpose of this cycle is to increase the coalition's knowledge and responsiveness. Learning feedback loops should be embedded into daily routines, so that you're able to learn and iterate in near real-time. They should not simply be tacked on at the end of a campaign, as often happens for a funder report or in planning for future campaigns.

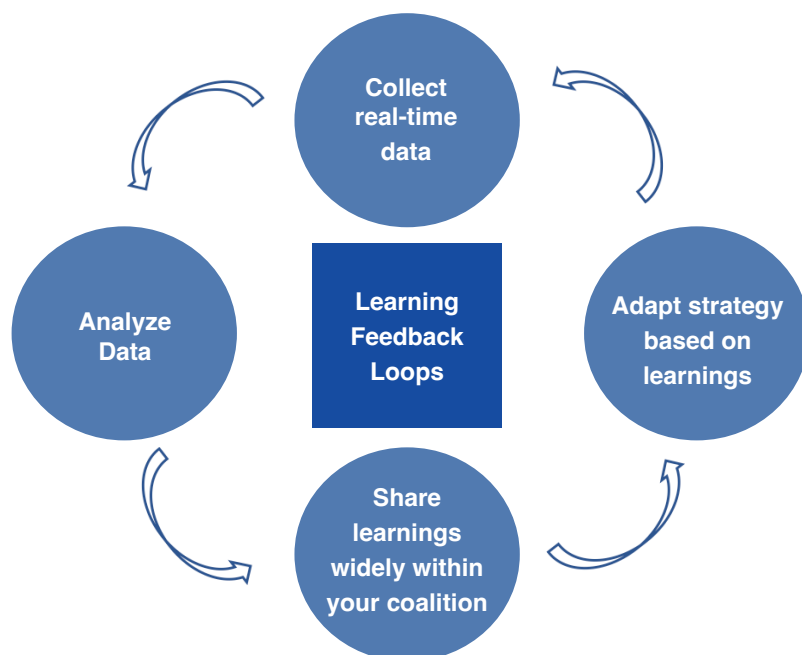


FIGURE 4.

A learning feedback loop involves collecting near real-time data, analyzing it, sharing learnings widely, and using those learnings to inform your strategy.

Coalition members at all levels should be engaged in this learning. Members do not need to be data analysts or experts to collect or make meaning from data. For example, your coalition can generate data by creating spaces where people meet and examine (and reexamine) the coalition's mission, goals, strategy, and activities. During these meetings, people can discuss what they've been noticing, including what is and is not working. Journaling exercises can also provide important insight into organizational experience and provide real-time feedback without requiring expertise. Coalition members can ritualize their personal journaling, even writing morning and evening if events are moving rapidly. Data from meetings, journaling, or any other activities should be made user-friendly and shared widely throughout the coalition.

Most importantly, to close the feedback loop, your coalition needs to be willing to adapt strategy based on what you've learned.

Assessment Questions

Question #33

Does your coalition have practices in place for learning (including learning about your coalition's internal dynamics and the external political landscape in which your coalition operates)? If yes, what are those practices? What works well about them? What works less well? *[Please write your response in the space below]*

Question #34

Does your coalition have practices for incorporating learnings into strategy and decision-making? If yes, what are they? How does your coalition know when to change course? *[Please write your response in the space below]*

Question #35

How developed are your coalition's practices for learning about the external political landscape?

- ☐ 1 – Not at all developed
- ☐ 2 – Slightly developed
- ☐ 3 – Somewhat developed
- ☐ 4 – Developed
- ☐ 5 – Very developed

Question #36

How developed are your coalition's practices for learning about internal coalition dynamics?

- ☐ 1 – Not at all developed
- ☐ 2 – Slightly developed
- ☐ 3 – Somewhat developed
- ☐ 4 – Developed
- ☐ 5 – Very developed

Question #37

How developed are your coalition's practices for sharing learnings widely within your coalition?

- ☐ 1 – Not at all developed
- ☐ 2 – Slightly developed
- ☐ 3 – Somewhat developed
- ☐ 4 – Developed
- ☐ 5 – Very developed

Question #38

How developed are your coalition's practices for applying what you've learned to strategy and decision-making?

- ☐ 1 – Not at all developed
- ☐ 2 – Slightly developed
- ☐ 3 – Somewhat developed
- ☐ 4 – Developed
- ☐ 5 – Very developed

Question #39

Are learning and iterating incorporated into your coalition's regular routines (vs. happening only at major moments, like the end of a campaign)?

- ☐ 1 – Not at all incorporated
- ☐ 2 – Slightly incorporated
- ☐ 3 – Somewhat incorporated
- ☐ 4 – Incorporated
- ☐ 5 – Very incorporated

Question #40

How quickly is your coalition able to learn about and incorporate new information?

- ☐ 1 – Very slowly
- ☐ 2 – Somewhat slowly
- ☐ 3 – Neither slowly nor quickly
- ☐ 4 – Somewhat quickly
- ☐ 5 – Very quickly

Question #41

Are members at all levels of the coalition (including those with the least power) able to participate in learning practices?

- ☐ 1 – Not at all able
- ☐ 2 – Slightly able
- ☐ 3 – Somewhat able
- ☐ 4 – Able
- ☐ 5 – Very able

LEARNING SCORE

Add up your score from questions 35-41: _____

UNDERSTANDING YOUR RESPONSES

How to Score Your Coalition

Scores range from 4.4 to 30.

To score your responses, follow these three steps:

1. Complete the survey assessment questions above and add up your score at the end of each section. Put that number next to the corresponding “Raw Score” below.
2. Next, divide each Raw Score by the number of questions in that section (listed below). Write down your results next to the corresponding “Total Score.”
3. Finally, add up your Total Scores from each section to calculate your Coalition Total Score.

Aspect of Coalition Architecture	Raw Score	Total Score	Score Range
Clear Roles & Trusting Relationships	/7 questions		1-5
Transparent Processes for Sharing Power through Democratic Governance			
Distributing-Power	/4 questions		1-5
Clear Decision-Making Rules	/5 questions		.2-5
Transparency	/4 questions		1-5
Holding the Coalition Accountable to these Governance Commitments	/5 questions		.2-5
Feedback Loops for Real-Time Learning & Flexibility	/7 questions		1-5
Coalition Total Score			4.4-30

Interpreting Your Score

The first thing to remember is that the goal is not to achieve a perfect score. It is to better understand your coalition and where it might benefit from additional investment and to assesses any changes over time.

Here are some questions for you to reflect on as you identify next steps:

- In which section did you rank the highest? What has your coalition done to invest in this aspect of coalition architecture? How does it benefit your coalition?
- In which section did you rank the lowest? What kinds of challenges does this create for your coalition?
- If additional coalition members filled out this reflection guide, compare your responses. Where are you in alignment? Where did you respond differently? Are there any patterns across responses in terms of who identified certain strengths vs. areas of growth?
- Among the different aspects of coalition architecture, which feel most important for your coalition to improve upon? Identify 1-2 areas to focus on and read the section of our full report that focuses on this type of architecture. Using these ideas as a starting off point, identify the next steps for this area of improvement, including:
 - A potential timeline for investment;
 - Resources needed;
 - People who should be involved;
 - Potential roadblocks or challenges.

Be in touch if you have any questions, feedback, or simply want to talk about your coalition!