



Organizational Mapping Tool for Coalitions, Alliances and Networks (OMT-CAN)

The OMT for Coalitions, Alliances and Networks (OMT-CAN) was inspired by the Organizational Mapping Tool (OMT), which was created to help the staff of a single organization reflect and build on its strong points and identify areas for institutional strengthening by fostering organization-wide discussion. In addition to looking at what works well and what could be improved, the original OMT allows the organization to collectively identify priority areas to strengthen and concrete steps to address them.

The OMT-CAN was created with the same objectives, to be used by a wide variety of coalitions, alliances and networks in different countries and regions of the world. Definitions vary and these terms are used in many different ways (for example, a group whose name indicates it is a coalition might be considered, by others, to be an alliance). **The OMT-CAN is designed to be used by any coalition, alliance or network (CAN) that has come together for something more than a one-time or short-term purpose. This is the case whether or not it is comprised of individuals or organizations (or a mix of both), has legal status or hired staff, and regardless of where the CAN may be in its process of evolution (newly formed, shifting toward greater formality and intentionality, already has a long-term history, etc.)¹**

The OMT-CAN draws on the content of Our Healthy Alliance (OHA), an on-line assessment tool created by RoadMap and the Movement Strategy Center, which takes a deep dive into the makings of a strategic alliance that builds social change movements. Readers are encouraged to check out [OHA and its related tools, glossary and other conceptual materials](#). We are also grateful to Change Elemental (formerly Management Assistance Group) for its input into the creation of this tool.

The next several pages of this document provide guidance on when to use the OMT-CAN versus the original OMT, how the OMT-CAN works, who participates, the role of the facilitator, important points to keep in mind as you go through the process, and more. However, your OMT facilitator will curate your OMT session to the specific needs of your CAN (Coalition, Alliance, or Network).

When to Use the OMT-CAN versus the OMT

In general, coalitions, alliances and networks will benefit from using the OMT-CAN rather than the original OMT if their purpose is to assess the overall CAN (including the individuals and organizations that it comprises). If the purpose is only to assess the leadership body of the CAN, the OMT-CAN is also ideal. In contrast, they should use the original OMT if their purpose is to assess the CAN's "parent organization" or "backbone organization" solely (if there is one).

We suggest asking the following questions when choosing between the tools:

Is the focus on assessing how the individuals and organizations that comprise the CAN work together (and work with the "parent organization")? In that case, the OMT-CAN would be most appropriate.

Or rather:

¹ For example, see RoadMap's Continuum of Collaboration, a chart that illustrates the spectrum of informal or time-limited collaboration to longer-term strategic alliances. Available at <https://roadmapconsulting.org/resource/continuum-of-collaboration/>.



Is the focus on assessing how the “parent organization” functions to support the CAN? In that case, the OMT may be most appropriate.

Both the OMT-CAN and the original OMT look at issues like vision and mission, governance, internal management and external communications, but each adds additional questions. The OMT-CAN has questions on how the individuals and organizations that comprise the CAN work together and work with the parent organization. People who take the OMT-CAN hold the perspective of the overall CAN—not their individual organizations or the parent organization only. In contrast, the original OMT has more extensive questions about aspects like human resources management, the internal management of programs, and executive leadership. People from a CAN who take the original OMT hold the perspective of the parent organization.

How the OMT-CAN Works

Who participates? Participation may vary for each coalition, alliance or network. As general principles and whenever possible:

- The more participation from people/organizations consistently involved and active in the work of the network, the better.
- All members of the leadership body should participate.
- For groups with organizational members, all member organizations should be represented by at least one person with sufficient knowledge and standing to engage in meaningful discussions.
- For groups with individual members, all members should participate, and especially those who have been consistently involved for a year or more.
- All staff should participate, both programmatic and administrative (paid or unpaid) if they have been with the organization for a minimum of six months.

When it is not possible for all members and/or staff to participate, a representative group may be chosen to participate. The criteria may vary but should take into consideration factors like representation of members, members with different levels of engagement, staff and leadership body; a mix of program and administrative staff (from the network and its members), if applicable; members with different levels of involvement and seniority; geographic location; and factors such as age, gender, race, nationality, ethnicity, caste, class, etc. Who selects this group may vary from case to case. The selection process should be as democratic, inclusive and transparent as possible.

When to fill out the survey: the process is best done with one person with experience in coalitions, alliances or networks who is not a member or staff person leading as facilitator (more about the facilitator’s role below). Generally, participants fill out the survey individually before the first session, or during the session itself. You will receive instructions on whether you should fill it out before the session or not. If you do fill it out before the session, please stop at the end of the Safety and Security section on page 45. You should only complete the remaining pages when asked to do so during the session.



Important points to keep in mind:

Throughout the process, participants should remember that this exercise is analyzing their coalition, alliance or network, not their individual organization.

As such, most questions are best answered when participants are wearing their “CAN hat” rather than answering from the point of view of their individual organization. However, some questions require participants to put on their “organizational or individual hat,” for example, when asked to assess their organization’s ability to be an effective member in the coalition, alliance or network, or to assess the value added of being part of the coalition, alliance or network. Please take note if you have any doubts about which “hat” is appropriate for any given question and share this with your facilitator during the in-person session.

Most questions use the shorthand “our CAN” to mean “our coalition, alliance or network” as a reminder to participants that this exercise is analyzing the coalition, alliance or network, not their individual organization.

- The categories in this survey are meant to help you think of your group along a continuum: Basic, Moderate, and Strong. If you have trouble selecting between two ratings (for example, Basic and Moderate), you may select the circle in between to indicate you mean somewhere in between.
- Please do not focus too much on the specific ratings or "score;" what is important is capturing a sense of where you think your CAN is. The principal value of the tool is in the collective discussion.
- You may find some questions where you partially agree and partially disagree with the rating descriptions. When choosing a rating, please weigh the overall strengths and weaknesses in that sub-category.
- Keep in mind that no group can be expected to be "Strong" on all categories, though all groups have strengths upon which to build and grow. CANs are always moving through their particular life cycles at different paces, and the process is rarely linear.
- Please use the Comments box found at the end of each section to explain your rating choice, especially if you find that the existing description is not fully accurate for your group. These can be informal notes that you may refer back to during the collective discussion. The comments are for your reference alone and will not be seen or collected by the facilitator.
- Several sections begin with an overarching question related to power analysis. You may want to revisit the initial question after completing that section.
- Please do not ask others how they are responding before completing the survey yourself. These should be your answers; there will be plenty of time to share impressions with your colleagues later.



Because the OMT-CAN is meant to be used with such a wide range of coalitions, alliances and networks, it is natural that some of the questions included will not apply.

It is also possible that you may not be able to address certain points from your position within the coalition, alliance or network.

If you think a question (or questions) does not apply at all or you feel that you do not have enough information to respond, please leave it blank. If you think the question framed differently could apply, just note in the Comments box what you actually want the question to say.

For example, if your CAN has no staff, you may skip the questions on Executive Leadership, Leadership Body/Staff Relationship and Human Resources.

Role of the Facilitator

As mentioned above, the process is best undertaken with an external facilitator *who has relevant experience with coalitions, alliances or networks*.³ Your facilitator will assist the group in coming to a consensus rating for each sub-category. Again, please wait to complete the prioritizing exercise at the end of the survey until asked to do so by the facilitator, after you have collectively determined the consensus ratings. You will then be asked to individually rank your first, second, and third priorities for what you want to strengthen.

The facilitator will then lead you through an exercise to collectively identify the top priorities of your group for institutional strengthening. This will lead to a discussion of the best ways to achieve your prioritized changes and serve as input for defining expected outcomes, strategies, timeline and people responsible for the strengthening work.

The facilitator will help you adapt questions as necessary, before and/or during the OMT exercise. **If the section on Advocacy does not apply (for example, if you are a network or coalition that provides services), you may work with your facilitator to replace the questions in that section with more relevant ones.**⁴

Sharing the results

Because this is your own process, your CAN should determine how you share the results with external audiences, if any, such as donors or constituents. When the facilitator has completed the final report, they will share it with your CAN's leaders (either staff or leadership body, as agreed in advance). The leaders will review the document and determine which aspects will be shared externally, if any.

Thank you for taking the time to share your perspective!

³ Ideally, the facilitator will have experience working with this CAN in particular, as well as experience facilitating conversations that address issues of power, including the ability to create containers for people who are more marginalized to participate fully and, if necessary, facilitate healing from ruptures.

⁴ If this section is replaced with other questions, the facilitator and the CAN should come to agreement on how these will be administered and included in the final report.



1. Purpose, Goals and Strategy

1. Purpose

Basic	Moderate	Strong
<p>Our CAN's shared purpose is unclear and/or it does not complement and strengthen members' work.</p>	<p>Our CAN's shared purpose is quite clear but not all members are sure that it fully complements and strengthens members' work.</p>	<p>Members share and are inspired by a strong, clear and compelling purpose for our CAN that is distinct from that of our members, and which complements and strengthens members' work.</p>

2. Vision

Basic	Moderate	Strong
<p>There is no alignment among members of our CAN around a common vision and time horizon, and/or this has never been discussed.</p>	<p>Members of our CAN have a general sense of shared vision and time horizon (shorter or longer term) but this has not been made explicit, or our vision is explicit but we lack alignment around it.</p>	<p>Members of our CAN are aligned around a compelling shared vision of what we hope to achieve and over what time horizon that inspires, provides cohesion and deepens our strategy.</p>

3. Shared Values

Basic	Moderate	Strong
<p>Members of our CAN have no alignment around shared values, and/or we have never discussed these.</p>	<p>Members of our CAN have discussed shared values, but they are not explicit, or they are explicit but do not fully inform our external work and internal practices.</p>	<p>Our CAN's values are explicit, widely understood by our members and are reflected in our external work and internal practices.</p>

4. Goals and Outcomes

Basic	Moderate	Strong
<p>Our CAN has no explicit goals or outcomes.</p>	<p>Our CAN has a general goal and/or outcomes for the short, medium and/or long-term time frame, but they do not help us realize our purpose or mission.</p>	<p>Our CAN has clear, ambitious, and realizable strategic goals and outcomes for the short, medium and/or long-term time frame that are entirely in keeping with our purpose and vision, and complement our members' goals and desired outcomes.</p>



1. Purpose, Goals and Strategy, *continued*...

5. Power Analysis

Basic	Moderate	Strong
<p>Our CAN has no analysis of power related to our external work.</p>	<p>Our CAN’s understanding and analysis of power is inconsistent or incomplete, or does not fully show up in our external work.</p>	<p>Our CAN has a strong, consistent understanding of power that shows up in our external work.</p>

6. Strategic Capabilities⁵

Basic	Moderate	Strong
<p>Our CAN’s mix of skills, perspectives and material conditions are nowhere adequate to achieve our purpose and expected outcomes.</p>	<p>Our CAN has some gaps in our mix of skills, perspectives and material conditions relative to what we need to achieve our purpose and expected outcomes</p>	<p>Our CAN has the overall mix of skills, perspectives, and material conditions necessary to achieve our purpose and expected outcomes with creativity and innovation.</p>

7. CAN Impact

Basic	Moderate	Strong
<p>Our CAN’s collective strategies and actions have little or no impact, and generally members consider that they could have equal or greater impact on their own.</p>	<p>Our CAN’s collective strategies and actions have impact that at times complements or adds value to the impact of our members.</p>	<p>Our CAN’s collective strategies and actions complement those of our members and create a larger or different positive impact collectively than our members could on their own.</p>

⁵ We use capabilities to refer to the combination of capacity and abilities.



1. Purpose, Goals and Strategy, *continued...*

8. Agility and Adaptation

Basic	Moderate	Strong
<p>Our CAN has little or no shared analysis of relevant context developments, or dynamics, nor ability to respond or adapt to important context developments. We routinely miss out on relevant opportunities.</p>	<p>Our CAN has some shared analysis of relevant context developments and dynamics. Our ability to respond or adapt to important context development and opportunities and/or our risk-taking is significant but sub-optimal.</p>	<p>Our CAN's members consistently feed into shared analysis of relevant context developments and dynamics. We respond quickly and easily to shifts in our members' priorities and capacities and to changing conditions and opportunities, proactively influencing those conditions, innovating and taking risks, as appropriate.</p>



1. Purpose, Goals and Strategy, *continued...*

Comments:



2. Composition, Structure, Identity and Participation

9. Power Analysis

Basic	Moderate	Strong
<p>Our CAN does not apply a power analysis to shape our composition, structure, identity, and member participation and development.</p>	<p>Our CAN inconsistently applies a power analysis to shape our composition, structure, identity, and member participation and development.</p>	<p>Our CAN consistently applies a power analysis to shape our composition, structure, identity, and member participation and development.</p>

10. Composition

Basic	Moderate	Strong
<p>We are nowhere near having the number, expertise and diversity of members needed to fulfill our vision, purpose and goals.</p>	<p>Our CAN has some gaps in the number, expertise and diversity of members needed to fulfill our vision, purpose and goals.</p>	<p>We have the right number and expertise of members to be effective in fulfilling our vision, purpose and goals. We include ample representation from relevant marginalized groups and/or the communities within which we work.</p>

11. Expectations of Members

Basic	Moderate	Strong
<p>Our CAN has little or no clarity about what it means to be a member.</p>	<p>Our CAN has a decent understanding of what it means to be a member (in terms of shared values, resources, work, communication, political commitments, and ethical considerations, including conflict of interest), but this needs to be updated, made more explicit, or clarified across the CAN.</p>	<p>Our CAN has a clear understanding of what it means to be a member, including what is expected of us (in terms of shared values, resources, workload, communication, political commitments, and ethical considerations, including conflict of interest).</p>



2. Composition, Structure, Identity and Participation, *continued...*

12. Structure

Basic	Moderate	Strong
<p>Our CAN has no formal structure, or it is totally inadequate to our purpose (perhaps overly bureaucratic).</p>	<p>Our CAN's structure needs some adjustments in order to be fully clear, agile and ideal for our purpose.</p>	<p>Our CAN's structure is clear, agile and ideal for our purpose. It has the optimal level of formality we need without being bureaucratic.</p>

13. Roles, Responsibilities and Accountability

Basic	Moderate	Strong
<p>In our CAN, there is little or no clarity about who is responsible for what and/or the lines of support, coordination and accountability. The division of labor among CAN entities (members, committees, the parent organization, staff, etc.) is not clear, appropriate, equitable, and/or respected.</p>	<p>Our CAN has some clarity about who is responsible for what and about lines of support, coordination and accountability, but we need improvements. The division of labor between CAN entities (members, committees, the parent organization, staff, etc.) is somewhat clear, appropriate, equitable, and respected.</p>	<p>In our CAN, everyone knows who is responsible for what and there are clear lines of support, coordination and accountability. The division of labor between CAN entities (members, committees, the parent organization, staff, etc.) is clear, appropriate, equitable, and respected.</p>

14. Process to Join and Exit

Basic	Moderate	Strong
<p>Our CAN has no stated process for joining or exiting and this often leads to confusion, tensions or inefficiencies.</p>	<p>Our CAN has an informal process for joining or exiting and this sometimes leads to confusion, tensions or inefficiencies.</p>	<p>We consistently follow a clear, principled and transparent process for joining and exiting the CAN.</p>



2. Composition, Structure, Identity and Participation, *continued...*

15. Participation

Basic	Moderate	Strong
<p>Members do not actively participate in our CAN.</p>	<p>CAN member participation is insufficient and/or uneven, and/or levels do not shift appropriately to the needs of the moment.</p>	<p>As a rule, CAN members actively participate at many levels, participation is equitable and inclusive, and levels of participation shift appropriately according to the needs of the moment.</p>

16. Identity

Basic	Moderate	Strong
<p>Our members feel no sense of belonging to our CAN.</p>	<p>Our members do not fully feel part of our CAN and often fail to appropriately identify themselves as such.</p>	<p>Our members feel very much a part of our CAN and identify themselves as such in keeping with explicit shared expectations for such identification.</p>

17. Strengthening of Members

Basic	Moderate	Strong
<p>Our CAN offers no efforts to strengthen our members (capabilities, resources, impact, etc.).</p>	<p>Our CAN needs to improve efforts to strengthen our members (capabilities, resources, impact, etc.).</p>	<p>Our CAN has an ongoing program to strengthen each member (capabilities, resources, impact, etc.) as appropriate to their needs and conditions.</p>



2. Composition, Structure, Identity and Participation, *continued...*

Comments:



3. Joint Action, Planning, Learning and Evaluation

18. Power Analysis

Basic	Moderate	Strong
<p>Our CAN does not apply a power lens as we conduct and use research, plan, collaborate, and do learning and evaluation.</p>	<p>Our CAN inconsistently applies a power lens as we conduct and use research, plan, collaborate, and do learning and evaluation.</p>	<p>Our CAN consistently applies a power lens as we conduct and use research, plan, collaborate, and do learning and evaluation.</p>

19. Research

Basic	Moderate	Strong
<p>Our CAN has little awareness or makes minimal use of existing research, nor do we generate or use our own research.</p>	<p>Our CAN is inconsistent or somewhat ineffective in our use of external and internal research in relation to our work.</p>	<p>Our CAN effectively employs external research and, where appropriate, individual members or the CAN provide their own research that contributes to the field and strengthens our work. This research lifts up multiple truths or perspectives without being extractive.</p>

20. Joint Planning

Basic	Moderate	Strong
<p>Our CAN has no planning of actions, initiatives, programs and strategies and our activities are mostly ad hoc.</p>	<p>Our CAN's planning of actions, initiatives, programs and strategies is not fully collective and participatory (as appropriate for our group) and/or is not fully aligned with both members' needs and collective goals.</p>	<p>Our CAN's planning of actions, initiatives, programs and strategies is collective and participatory (as appropriate for our group), and ensures our work is based on and aligned with both our members' needs and our collective goals.</p>



3. Joint Action, Planning, Learning and Evaluation, *continued...*

21. Coordination

Basic	Moderate	Strong
CAN members do not coordinate or have working agreements.	CAN members are somewhat effective at coordinating together. We lack clear working agreements that are known to and within all members.	CAN members are highly effective at coordinating together. Important working agreements are written and known to and within all members.

22. Integration into Member Work Plans

Basic	Moderate	Strong
Our CAN members do not include our work in their own work plans.	Our CAN members do not fully integrate the collective work into their own work plans, creating tensions and gaps around coordination, time and other resources.	Our CAN members fully integrate the collective work into their own work plans, ensuring the necessary coordination, time and other resources.

23. Pace of Activities

Basic	Moderate	Strong
Our CAN's pace of activities is inappropriate given the context and/or unsustainable.	Our CAN's pace of activities is not fully appropriate or sustainable.	Our CAN's pace of activities responds appropriately to the context, creates momentum and is sustainable.

24. Learning and Evaluation

Basic	Moderate	Strong
Our CAN has no moments or mechanisms to assess impact, outcomes, strategies, activities or outputs. We have little to no learning, reflection, or experimentation.	Our CAN's evaluation (of impact, outcomes, strategies, activities and outputs) is inconsistent or incomplete and/or learnings, reflections, or experimentation are not sufficiently incorporated into our programs and strategies.	Our CAN implements a solid framework for evaluation (of impact, outcomes, strategies, activities, and outputs); ongoing learning, reflection, or experimentation continually loops back into our strategies, programs and external communications.



3. Joint Action, Planning, Learning and Evaluation, *continued...*

Comments:



4. Impact on the Field

25. Power Analysis

Basic	Moderate	Strong
<p>Our CAN does not apply a power lens as we consider the impact we want to have on the field, the partners with whom we will collaborate, our role in the movement and our relationships and clout.</p>	<p>Our CAN inconsistently applies a power lens as we consider the impact we want to have on the field, the partners with whom we will collaborate, our role in the movement and our relationships and clout.</p>	<p>Our CAN consistently applies a power lens as we consider the impact we want to have on the field, the partners with whom we will collaborate, our role in the movement and our relationships and clout.</p>

26. Collaboration with Partners and Allies

Basic	Moderate	Strong
<p>Our CAN has little awareness of and virtually no collaboration with partners and allies or other actors in the field.</p>	<p>Our CAN has some collaborations with partners and allies or other actors in the field at local, national, regional and/or global levels, as appropriate. These are not always fully productive.</p>	<p>Our CAN has extensive and productive collaborations with enough partners and allies or other actors in the field at local, national, regional and/or global levels, as appropriate.</p>

27. Role in Movement

Basic	Moderate	Strong
<p>As a collective, Our CAN does not see itself as part of a larger movement and/or we rarely make contributions.</p>	<p>Our CAN sees itself as part of one or more movements and makes occasional contributions.</p>	<p>Our CAN identifies our strategic role in one or more movements and makes solid and consistent contributions.</p>



4. Impact on the Field, *continued...*

28. Relationships and Clout



Basic

Moderate

Strong

Our CAN has insignificant or ineffective relationships or clout with the people and entities we need to influence to achieve our desired impact.

Our CAN has gaps in the relationships and clout with the people and entities we need to influence to achieve our desired impact.

Our CAN has the relationships and clout with the people and entities we need to influence to achieve our desired impact.





4. Impact on the Field, *continued...*

Comments:



5. Advocacy and Organizing

29. Power Analysis

Basic	Moderate	Strong
<p>As our CAN considers how we conduct our advocacy work and organizing, we do not apply a power analysis.</p>	<p>As our CAN considers how we conduct our advocacy work and organizing, we inconsistently apply a power analysis.</p>	<p>As our CAN considers how we conduct our advocacy work and organizing, we consistently apply a power analysis.</p>

30. Advocacy Strategy

Basic	Moderate	Strong
<p>Our CAN has no strategy for influencing key targets or holding target groups accountable.</p>	<p>Our CAN’s advocacy efforts are not consistently guided by a coherent and effective strategy or informed by a power analysis. We do not implement a consistent strategy for holding key targets accountable.</p>	<p>Our CAN employs a sophisticated advocacy strategy informed by a power analysis at the local, national and/or international levels. The strategy proactively and reactively influences and impacts key targets and holds them accountable (e.g., voters, elected/appointed officials, courts, corporations).</p>

31. Political Engagement

Basic	Moderate	Strong
<p>Our CAN has no readiness, skills or contacts to participate in substantive policy or accountability processes or discussions.</p>	<p>Our CAN has gaps in our readiness, skills or contacts to participate in substantive policy or accountability processes or discussions.</p>	<p>Our CAN is ready and skillful, well-respected and regularly called upon to participate in or lead policy or accountability processes and discussions at the local, national, or international levels.</p>



5. Advocacy and Organizing, *continued*...

32. Base Building

Basic	Moderate	Strong
<p>Our CAN has little or no ability to mobilize at the grassroots level.</p>	<p>Our CAN mobilizes some people on the grassroots level that support our cause, but our capacity for organizing needs improvement in terms of numbers and/or involving the communities most impacted by the problems we address.</p>	<p>Our CAN mobilizes large numbers of people on the grassroots level that actively support our cause, especially those from the communities most impacted by the problems we address.</p>

33. Relationships with Constituents

Basic	Moderate	Strong
<p>The constituents that have the greatest stake in our CAN's work are not represented in leadership positions, nor do they participate in our activities.</p>	<p>The constituents that have the greatest stake in our CAN's work are represented partially in leadership positions and participate somewhat in our activities. Their involvement in feedback loops that inform our work needs improvement.</p>	<p>The constituents that have the greatest stake in our CAN's work are represented in leadership positions, participate fully in our activities, and are involved in feedback loops that consistently inform our work.</p>

34. Policy Recommendations

Basic	Moderate	Strong
<p>Our CAN makes no clear or effective policy recommendations.</p>	<p>Our CAN sometimes makes clear and effective policy recommendations in keeping with our purpose and strategy. These recommendations are not always based on the experience of people who are most impacted or an analysis of power, and/or we could do better at adapting to changes in the political landscape.</p>	<p>Our CAN consistently makes clear and effective policy recommendations in keeping with our purpose and strategy. These recommendations are based on the experience of people who are most impacted and an analysis of power. These recommendations are adjusted, as necessary, to changes in the political landscape.</p>



5. Advocacy and Organizing, *continued...*

Comments:



6. Strategic Communications

35. Power Analysis

Basic	Moderate	Strong
<p>Our CAN does not apply a power lens to our communications strategies, messaging or dissemination plans.</p>	<p>Our CAN inconsistently applies a power lens to our communications strategies, messaging or dissemination plans.</p>	<p>Our CAN consistently applies a power lens to our communications strategies, messaging and dissemination plan, which are aligned with movements and relevant marginalized groups and/or the communities we work within.</p>

36. Communications Strategy

Basic	Moderate	Strong
<p>Our CAN has no explicit communications strategy. Neither key audiences nor messages have been identified.</p>	<p>Our CAN has a communications strategy, but it is not tailored to key audiences or otherwise is incomplete.</p>	<p>Our CAN has a clearly outlined, shared and understood strategy for shifting the debate on our issues and for communications with targeted, distinct and prioritized audiences, using messages that are updated as needed. Communications is integrated with base building and advocacy, as appropriate, and well-coordinated across CAN members.</p>

37. Collective Framing and Narrative⁷

Basic	Moderate	Strong
<p>Our CAN does not apply framing and narrative development in our collective work.</p>	<p>Our CAN sometimes applies framing and narrative development to our collective work.</p>	<p>Framing and narrative development is part of our CAN's core work and is fully integrated into our planning, programs and communications.</p>

⁷ Narrative refers to the “stories, myths, and messages that are strategically and holistically used to shift fundamental beliefs, values, and behaviors in society (including our understanding of and relationship to the world).” [“Toward New Gravity: Charting a Course for the Narrative Initiative.”](#) The Narrative Initiative, 2017.



6. Strategic Communications, *continued...*

38. Communications Staff/Team

Basic	Moderate	Strong
Our CAN has no communications staffing at our disposal.	Our CAN has gaps in the human resources needed for our communications work, or these are not effectively coordinated.	Our CAN has a well-coordinated communications team commensurate with our communications strategy and needs (either members' staff or CAN staff).

39. Communications Vehicles and Platforms

Basic	Moderate	Strong
Our CAN has no updated vehicles or platforms to communicate information and messages to target audiences.	Our CAN's vehicles and platforms are mostly appropriate for our target audiences, but not used to their full potential.	Our CAN's vehicles and platforms are well-selected and used optimally to communicate clear and specific information and messages to key audiences.

40. Response to Attacks

Basic	Moderate	Strong
Our CAN is entirely ineffective at preventing or addressing potential attacks.	Our CAN's response to attacks is not systematic and has partial success at advancing or protecting our agenda.	Our CAN implements established mechanisms for preventing and effectively addressing attacks. We use attacks as opportunities to advance our agenda and to reduce our vulnerability.



6. Strategic Communications, *continued...*

Comments:



7. Coalition, Alliance or Network Leadership and Governance

41. Power Analysis

Basic	Moderate	Strong
<p>Our CAN does not apply a power lens in relation to our leadership and governance.</p>	<p>Our CAN inconsistently applies a power lens in relation to our leadership and governance.</p>	<p>Our CAN consistently applies a power lens in relation to our leadership and governance.</p>

42. Leadership Distribution⁸

Basic	Moderate	Strong
<p>Our CAN takes no steps to distribute leadership across or down into our members.</p>	<p>Leadership is somewhat distributed across and down into our CAN members.</p>	<p>Leadership is actively distributed across our CAN members (and, when members are organizations, also downward, involving a range of staff within them).</p>

43. Leadership Development

Basic	Moderate	Strong
<p>Our CAN takes no steps to strengthen leadership across our members.</p>	<p>Our CAN takes some, but insufficient measures to strengthen leadership development through skills-building and opportunities for growth into higher level roles.</p>	<p>CAN leadership is widely and actively strengthened with trainings, other skill development, and explicit opportunities for leaders to grow into higher level roles.</p>

⁸ Note that Leadership Distribution and the following question, Leadership Cultivation, refer to leadership generally from members and/or staff, above and beyond the leadership body (which may be a Steering Committee, Executive Committee, Board, etc.).



7. Coalition, Alliance or Network Leadership and Governance, *continued...*

44. Balancing Interests

Basic	Moderate	Strong
<p>Our CAN members do not clearly distinguish their role as leaders of our CAN versus representatives of their organization.</p>	<p>Our CAN members generally distinguish between their role as leaders of our CAN versus representatives of their organization, but could “wear both hats” more explicitly and effectively.</p>	<p>Our CAN members are able to distinguish clearly between their role as leaders of our CAN versus representatives of their organization, and effectively “wear both hats” in ways that are strategic for the CAN and its member organizations.</p>

45. Leadership Body Composition

Basic	Moderate	Strong
<p>Our CAN’s leadership body is not representative of diverse perspectives or the communities we work within, nor does it have the required content expertise, skills, qualities, trust and respect to lead the CAN.</p>	<p>Our CAN’s leadership body is fairly representative of diverse perspectives and the communities we work within, and has many of the skills and qualities needed to lead the CAN.</p>	<p>Our CAN’s leadership body is appropriately representative of diverse perspectives and the communities we work within, and has the required content expertise, skills, qualities, trust and respect to lead the CAN.</p>

46. Leadership Body Roles and Responsibilities

Basic	Moderate	Strong
<p>Our CAN has no formal leadership body or our leadership body fails to understand its role or fulfill an appropriate set of responsibilities for governance and support.</p>	<p>Our CAN’s leadership body has an incomplete understanding of its role and fulfills several of the responsibilities for providing governance and support. Training to this end is not fully adequate.</p>	<p>Our CAN’s leadership body understands its role and fulfills an optimal set of responsibilities for providing governance and support, and receives training, as needed, to this end.</p>



7. Coalition, Alliance or Network Leadership and Governance, *continued...*

47. Leadership Body Policies or Working Agreements

Basic	Moderate	Strong
<p>Our leadership body has no working agreements or policies on issues such as term limits and conflict of interest.</p>	<p>Our leadership body has partially formalized and sometimes implements a set of working agreements and policies on issues such as term limits or conflict of interest.</p>	<p>Our leadership body implements clear and appropriate working agreements or policies on issues such as term limits and conflict of interest that exist in writing and are available to all members.</p>

48. Leadership Body/Staff Relationship

Basic	Moderate	Strong
<p>Our CAN has serious communication problems and/or confusion about the roles of leadership body and staff. The relationship is fraught with unaddressed tensions or otherwise is not functioning effectively. There are unresolved differences of opinion</p>	<p>Our CAN's leadership body and staff communicate and work relatively well with one another, but occasional tensions and problems emerge that are not addressed optimally.</p>	<p>Our CAN's leadership body and staff (including CAN director(s) or coordinator(s), if applicable) have clarity about their respective roles and autonomy and a highly functioning relationship. When tensions or problems emerge, they are addressed constructively and effectively.</p>

49. Executive Leadership (Paid or Unpaid)

Basic	Moderate	Strong
<p>Our CAN needs but does not have formal executive leadership positions.</p>	<p>Our CAN is not fully clear and up-to-date about what we need and want in terms of paid or unpaid executive leadership, or has yet to create the appropriate title, authority and role. The coordinator's or director(s)' profile, values, skills and experience are mostly valued by members and staff.</p>	<p>Our CAN is clear about and regularly revisits what we need and want in terms of paid or unpaid executive leadership, and has created the appropriate title, authority and role. The coordinator or director position(s) are held by persons with the profile, values, experience, and interpersonal and other skills to be fully effective in their role.</p>



7. Coalition, Alliance or Network Leadership and Governance, *continued...*

50. Transition Planning

Basic	Moderate	Strong
<p>Our CAN is highly dependent on the current leadership (paid or unpaid) and has no plans to deal with transition.</p>	<p>Our CAN is still fairly dependent on current leadership in key positions (paid or unpaid) and lacks adequate plans for dealing with this challenge.</p>	<p>Our CAN proactively plans for transition in paid and unpaid leadership positions. We have a pipeline that is preparing new leadership and transitions are generally smooth.</p>

51. Membership Representation

Basic	Moderate	Strong
<p>Our CAN does not address transitions in who represents member organizations. New representatives often are not the best person for that role.</p>	<p>When members are organizations, our CAN often ensures that new representatives are the best persons for that role and receive orientation and support from the CAN and their organization.</p>	<p>When members are organizations, our CAN proactively ensures that new representatives are the best persons for that role and receive effective orientation and support from the CAN and their organization.</p>



7. Coalition, Alliance or Network Leadership and Governance, *continued...*

Comments:



8. Culture and Relationships

52. Diverse Perspectives

Basic	Moderate	Strong
<p>Our CAN does not involve people with diverse community perspectives as full and equal leaders, participants, and partners.</p>	<p>Our CAN has made progress on involving people with diverse community perspectives as full and equal leaders, participants and partners.</p>	<p>Our CAN implements policies and systems for involving people with diverse community perspectives as full and equal leaders, participants and partners.</p>

53. Power Dynamics

Basic	Moderate	Strong
<p>Our CAN does not focus on power dynamics.</p>	<p>Our CAN partially discusses and addresses power dynamics and surfaces some differences among the people and organizations involved, but more needs to be done.</p>	<p>Our CAN effectively discusses and addresses power dynamics and we take measures to surface differences among the people and organizations involved.</p>

54. Relationships and Trust

Basic	Moderate	Strong
<p>Our CAN takes little or no time to build internal relationships, reflect, and nurture our CAN. Levels of trust among members (and staff) are low.</p>	<p>Our CAN focuses some time and energy on building internal relationships and nurturing our CAN. We have enough trust to complete joint or coordinated actions.</p>	<p>Our CAN takes the necessary time to build internal relationships and nurture our CAN. High levels of trust among members (and staff) create a sense of wholeness, possibility, and mutual interest.</p>



8. Culture and Relationships, *continued*...

55. Personal Styles

Basic	Moderate	Strong
<p>Individuals and teams within our CAN with certain styles of learning, expression, etc. are unable to be heard or contribute.</p>	<p>Individuals and teams within our CAN with different styles of learning, communication, expression, etc. are somewhat, though not fully, able to be heard and contribute.</p>	<p>Individuals and teams within our CAN with different styles of learning, communication, expression, etc. are able to be heard and contribute fully.</p>

56. Teamwork

Basic	Moderate	Strong
<p>Our CAN works as individuals, or distinct organizations, and not as a team.</p>	<p>Our CAN values collaboration and teamwork but needs to make improvements.</p>	<p>Collaboration and coordination are part of our CAN's culture and consistently contribute to our effectiveness. Member-to-member ties and support are strong. We work through challenges based on good faith and healthy communication.</p>

57. Appreciation and Acknowledgment

Basic	Moderate	Strong
<p>In our CAN, people rarely or never receive positive feedback or acknowledgment and we do not identify or celebrate our successes.</p>	<p>Our CAN marks our successes and acknowledges everyone's contributions from time to time, but could do this more or better.</p>	<p>Our CAN has a strong culture of appreciation and celebration in which we regularly mark successes and acknowledge everyone's contributions, both big and small.</p>

58. Internal Communications

Basic	Moderate	Strong
<p>Our CAN has no internal communications systems and information-sharing is infrequent and inconsistent.</p>	<p>Our CAN has decent internal communication systems but needs to improve information-sharing across members and/or, when applicable, within members.</p>	<p>Internal communications in our CAN are effective with clear systems for open information-sharing across members and, when applicable, within members, including around sensitive issues such as finances (income, resource allocation, etc.).</p>



8. Culture and Relationships, *continued*...

59. Decision Making

Basic	Moderate	Strong
<p>Our CAN's decision-making processes and participation mechanisms are completely unclear and/or inadequate.</p>	<p>Our CAN is somewhat successful in co-creating decision-making processes and roles. Decision-making processes and participation are generally, but not always, clear and effective. We usually make sound and timely decisions.</p>	<p>Our CAN is intentional in co-creating decision-making processes and roles that are clear, widely known, effective, and involve appropriate input and participation from members, staff and others. Our processes lead to sound and timely decisions.</p>

60. Meetings

Basic	Moderate	Strong
<p>Our CAN's meetings are not well-planned, attended, documented or productive; there is no follow-up to agreements.</p>	<p>Most of our CAN's meetings function smoothly and are generally well-attended and well-documented, but we need to make some improvements, including adequate follow-up.</p>	<p>Our CAN's meetings are well-planned, facilitated, attended and documented, and lead to clear and compelling outcomes with thorough and timely follow-up to agreements in between meetings.</p>

61. Management of Tensions and Conflict

Basic	Moderate	Strong
<p>Our CAN rarely discusses tensions or conflict, or does so wholly ineffectively.</p>	<p>Our CAN makes an effort to address tensions and conflict constructively, but we do not do so well. Tensions and disagreements among members sometimes prevent collaboration or resource-sharing.</p>	<p>Tensions or conflicts among CAN members are addressed constructively in a manner that allows open discussion, alignment with its principles and effective collaboration to advance common goals, and creative and generative solutions</p>



8. Culture and Relationships, *continued...*

Comments:



9. Network Resources

62. Power Analysis

Basic	Moderate	Strong
Our CAN does not apply a power lens in relation to the mobilization and sharing of network resources.	Our CAN inconsistently applies a power lens in relation to the mobilization and sharing of network resources.	Our CAN consistently applies a power lens in relation to the mobilization and sharing of network resources.

63. Fundraising Agreements

Basic	Moderate	Strong
Our CAN has no policy regarding fundraising decisions or coordination. Tensions and competition undermine our ability to fulfill our common purpose and goals.	Our CAN has informal or incomplete agreements regarding fundraising: how decisions are made about fundraising for the CAN overall and for members, and how we coordinate fundraising by members and by the CAN.	Our CAN adheres to clear, written guidelines regarding fundraising: how decisions are made about fundraising for the CAN overall and for members, and how we coordinate fundraising by members and by the CAN. Our agreements leverage our ability to raise funds for the CAN as a whole and all the members, and reduce a sense of competition or cross-purpose activities.

64. Financial Sustainability

Basic	Moderate	Strong
Our CAN is fully dependent on just one funder or member contributions, and/or CAN funding is wholly inadequate to our purpose and needs.	Our CAN has a few key donors whose support is generally sufficient to meet our needs, but no cushion exists.	Our CAN regularly has diverse and sustainable funding streams. CAN funds are available consistently to meet our full needs, allow for flexibility and provide a cushion for unforeseeable situations.



9. Network Resources, *continued...*

65. Resourcing our Members

Basic	Moderate	Strong
<p>Our CAN does not address issues related to sufficiently resourcing all of our members or how we allocate resources.</p>	<p>Our CAN has some commitment to resource our members and allocates resources to that end, but those efforts fall short, agreements about allocation are unclear, and/or distribution is not fully equitable.</p>	<p>Our CAN consistently demonstrates a strong commitment to doing all we can to ensure our members have resources sufficient for their full participation and work (e.g., funds, time, dedicated staff, support for travel, child care, etc.). Agreements are clear regarding how resources are allocated among members and CAN, and are shared equitably (not necessarily equally) to that end.</p>

66. Donor Relations

Basic	Moderate	Strong
<p>Our CAN's communication with donors is insufficient or ineffective.</p>	<p>Our CAN has good relationships with our donors, but communications are not always optimal.</p>	<p>Our CAN has a strong and positive reputation with donors, and is known for clear, timely, proactive and reactive communications and reporting.</p>



9. Network Resources, *continued...*

Comments:



10. Human Resources and Security

67. Power Analysis

Basic	Moderate	Strong
Our CAN does not apply a power analysis to the various aspects of our human resources and security policies and practices.	Our CAN inconsistently applies a power analysis to the various aspects of our human resources and security policies and practices.	Our CAN consistently applies a power analysis to the various aspects of our human resources and organizational security policies and practices.

68. Staffing (*Paid and Unpaid*)

Basic	Moderate	Strong
Our CAN's staffing needs are not identified, planned for, or fulfilled.	Our CAN's basic staffing needs are met, though levels of turnover are a problem.	CAN staffing needs are identified, planned for and fully met (by individual members, members' staff, or CAN staff). Staff rotation is neither too frequent nor too infrequent.

69. Diverse Perspectives

Basic	Moderate	Strong
CAN staff do not include, or minimally include, diverse perspectives, or some voices are not fully valued and supported.	CAN staff usually include diverse perspectives and/or the perspectives of members of the communities we work within.	CAN staff at all levels intentionally include diverse perspectives and/or perspectives of the communities we work within, and all voices are fully valued and supported.

70. Job Descriptions

Basic	Moderate	Strong
Job descriptions for CAN staff and volunteers are not documented, and roles and responsibilities are not clearly delineated.	Some but not all CAN positions have updated job descriptions. We are generally but not always clear on staff roles and responsibilities in service of the network versus in service of their own organizations.	Job descriptions for CAN staff and volunteers are accurate and updated. Staff are clear on roles and responsibilities in service of the network versus their roles in service of their own organizations.



10. Human Resources and Security, *continued...*

71. Human Resources Policies for CAN Staff and Volunteers

Basic	Moderate	Strong
<p>Our CAN has no human resources policies for CAN staff and volunteers.</p>	<p>Our CAN has some gaps in the scope or quality of our human resources policies for CAN staff and volunteers.</p>	<p>Our CAN has optimal and clear human resources policies for CAN staff and volunteers including (as appropriate) salary scale, job appraisals, professional development, staff care, and compensation.</p>

72. Human Resources Practices for CAN Staff and Volunteers

Basic	Moderate	Strong
<p>Our CAN's human resources practices are highly problematic.</p>	<p>Our CAN has notable gaps in the implementation of our human resources policies and practices.</p>	<p>All of our CAN's human resources policies and practices are carried out effectively, including (as appropriate) hiring, firing, team management, delegation, feedback, etc.</p>

73. Compensation and Benefits

Basic	Moderate	Strong
<p>The salaries and benefits for our CAN's paid staff are wholly inadequate.</p>	<p>The salaries and/or benefits provided by our CAN are generally adequate but not entirely competitive and attractive for all paid staff.</p>	<p>Our CAN provides competitive salaries and an attractive benefits package for all paid staff.</p>



10. Human Resources and Security, *continued...*

Comments:



11. Administration and Finance

74. Administration

Basic	Moderate	Strong
<p>Our CAN has no documented administrative procedures and members are unfamiliar with our legal obligations.</p>	<p>Many of our CAN's administrative procedures are clearly documented and well implemented while others remain ad hoc or undefined. We are generally, but not always, compliant with our legal obligations.</p>	<p>Effective administrative procedures for our CAN are clearly documented, consistently implemented and regularly reviewed and updated. We are fully compliant with all legal obligations.</p>

75. Technology and Information Systems

Basic	Moderate	Strong
<p>Our technology and information systems do not meet our basic needs.</p>	<p>Our CAN has decent technology and information systems, but these need to be updated, expanded or otherwise improved upon.</p>	<p>Our CAN's technology and information systems allow us to function optimally, including data collection and analysis, and systems are regularly reviewed and updated.</p>

76. Financial Planning and Management

Basic	Moderate	Strong
<p>Our CAN has no financial systems, procedures or internal oversight that govern our financial planning and operations, record-keeping or reporting.</p>	<p>Our CAN has a basic financial management system, but this needs significant improvement.</p>	<p>Our CAN's financial management systems are robust, transparent and effective, including internal controls, budgeting, allocation of resources to members, budget to actual comparisons, cash flow, other record-keeping, and reporting.</p>

77. Financial Obligations

Basic	Moderate	Strong
<p>Our CAN chronically cannot meet its financial commitments.</p>	<p>Our CAN generally meets its financial commitments.</p>	<p>Our CAN meets all of its financial commitments in a timely manner.</p>



11. Administration and Finance, *continued...*

78. Audits *(if applicable)*

Basic	Moderate	Strong
<p>Our CAN has no documented audit procedures and audits are not conducted.</p>	<p>Our CAN conducts audits, but there are gaps in the frequency, or we do not follow up consistently on the findings.</p>	<p>Our CAN has independent annual audits and findings are addressed and disseminated to appropriate audiences.</p>

79. Power Analysis

Basic	Moderate	Strong
<p>Our CAN does not apply a power lens to our administration and finances.</p>	<p>Our CAN inconsistently applies a power lens to our administration and finances.</p>	<p>Our CAN consistently applies a power lens to our administrative and financial systems and management.</p>



11. Administration and Finance, *continued...*

Comments:



12. Safety and Security

80. Safety and Security

Basic	Moderate	Strong
<p>Our CAN has no plans or policies around risk assessment, safety and security (of staff, both physical and emotional, as well as assets, infrastructure, digital, etc.).</p>	<p>Our CAN has incomplete plans, policies or informal agreements about handling safety and security; these are not implemented consistently.</p>	<p>Our CAN effectively and consistently implements comprehensive plans and policies around risk assessment, safety and security (of staff, both physical and emotional, as well as assets, infrastructure, digital, etc.).</p>

81. Cybersecurity

Basic	Moderate	Strong
<p>Our CAN has no plans or policies for cybersecurity.</p>	<p>Our CAN has incomplete digital security policies and/or does not implement these fully.</p>	<p>Our CAN implements comprehensive, documented internal digital security policies, including: categorization of data we store by sensitivity and control of access based on sensitivity; a data retention policy (how much sensitive information we store, how long and where); and exit interviews and removal of access to accounts for individuals or organizations that are leaving.</p>



12. Safety and Security, *continued ...*

Comments:



My Evaluation of the OMT Exercise

Basic	Moderate	Strong
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I did not feel comfortable speaking candidly in this session.

For the most part, I was able to speak candidly, although there were some parts where candid discussions were not possible for me.

I was able to speak very candidly today, even about difficult issues.

Please note anything else you would prefer to comment on anonymously. Comments may include your experience completing the survey, participating in the discussions, or any other aspect of the process. Please also share any concerns or observations about any of the substantive aspects of the survey. Is there anything important to the organization that has been missed by the survey?



Prioritization Exercise

Now that you have considered all these aspects of organizational effectiveness, there are likely many different aspects you would want to strengthen. The following exercise allows you the opportunity to consider what you would wish to prioritize first, second, and third to work on. These may be aspects that feel “weaker” or that imply identifying strengths that you would like to address further or differently.

Note: *These questions are intended to be filled out at the end of the facilitated meeting. You do not need to answer these questions until members of your Coalition, Alliance, or Network have met as a group and identified consensus answers to the survey.*

Once you have done this, you have the opportunity below to consider what you would wish to prioritize first, second, and third for institutional strengthening.

You may choose to focus on the larger categories (like Strategic Communications) or specify a subcategory (like Communications Strategy).

Please list your **first** priority.

Please list your **second** priority.

Please list your **third** priority.



For Facilitator Use Only

OMT REPORT FORMAT

Name of Coalition, Alliance, or Network:

Dates OMT-CAN was Conducted:

Number of Participants:

Number of Participants from Leadership Body *(if any)*:

Number of Members who participated:

How was the OMT-CAN Facilitated? In Person Virtually Hybrid

Facilitator's Name:



Weighted Prioritization Exercise (optional):

	First	Second	Third	Totals	Weighted Tally
1. Purpose, Goals, and Strategy					
2. Composition, Structure, Identity and Participation					
3. Joint Action, Planning, Learning and Evaluation					
4. Impact on the Field					
5. Advocacy and Organizing					
6. Strategic Communications					
7. Coalition, Alliance or Network Leadership and Governance					
8. Culture and Relationships					
9. Network Resources					
10. Human Resources and Security					
11. Administration and Finance					
12. Safety and Security					

Please note here if a specific aspect of capability was highlighted as a priority (for example: Technology and Information Systems within Administration and Finance or Research within Joint Action, Planning, Learning and Evaluation):



Next Steps and Resource Identification

Priority One:

Please list the first priority from the preceding exercise. This can be a major category (like Impact on the Field) or a subcategory (like Relationships and Clout).

What are the expected outcomes for this priority for the next few years? What does “success” look like?

What specifically would the Coalition, Alliance, or Network need to do to become stronger in this area? (List specific follow-up actions, for example, receive training, hire staff, and have IT capabilities).

What can your Coalition, Alliance, or Network do to get stronger in this area without external support?

How specifically might a funder support your Coalition, Alliance, or Network in strengthening in this area? What specifically would you ask for in a funding proposal?



Priority Two:

Please list the second priority from the preceding exercise. This can be a major category (like Impact on the Field) or a subcategory (like Relationships and Clout).

What are the expected outcomes for this priority for the next few years? What does “success” look like?

What specifically would the Coalition, Alliance, or Network need to do to become stronger in this area? (List specific follow-up actions, for example, receive training, hire staff, and have IT capabilities).

What can your Coalition, Alliance, or Network do to get stronger in this area without external support?

How specifically might a funder support your Coalition, Alliance, or Network in strengthening in this area? What specifically would you ask for in a funding proposal?



Priority Three:

Please list the third priority from the preceding exercise. This can be a major category (like Impact on the Field) or a subcategory (like Relationships and Clout).

What are the expected outcomes for this priority for the next few years? What does “success” look like?

What specifically would the Coalition, Alliance, or Network need to do to become stronger in this area? (List specific follow-up actions, for example, receive training, hire staff, and have IT capabilities).

What can your Coalition, Alliance, or Network do to get stronger in this area without external support?

How specifically might a funder support your Coalition, Alliance, or Network in strengthening in this area? What specifically would you ask for in a funding proposal?



Optional: Additional Comments



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