

## Example of a Partnership Screening Tool

### Shared Goals

**Benchmark** | *My partner and I share an understanding of the goals our partnership seeks to achieve.*

#### Guiding Questions

- Why are we partnering? What need and specific population is our partnership designed to address?
- How often do we check-in about our goals of the partnership and our progress toward these goals?
- Are our goals we've set forth for our partnership achievable within a reasonable timeframe?
- What are we not trying to achieve through our partnership? What needs and activities are beyond the scope of this partnership?
- How have our goals evolved as the partnership has evolved?

#### Notes

#### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

### Maximizing Partner Value

**Benchmark** | *My partner and I bring complementary expertise to the partnership and maximize the unique value we each bring.*

#### Guiding Questions

- What value—including skills and expertise—does each partner contribute to the partnership?
- Is there a balanced sharing of resources in our partnership?
- Are there other ways each partner can contribute to the partnership?
- What additional skills and expertise are needed to achieve our partnership's goals? Do partners currently possess these skills?

#### Notes

#### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

3

### Leveraging External Relationships

**Benchmark** | *We fully leverage our relationships with the community, funders, and other professional networks to advance our partnership's goals.*

#### Guiding Questions

- What external stakeholders support our partnership? Who are the external supporters of our partnership?
- How do external stakeholders contribute to our partnership?
- What opportunities exist to deepen our current external relationships?
- What other stakeholders could help to advance our efforts? How so?
- How will external relationships support the sustainability of our partnership as it evolves?

#### Notes

#### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

### Internal Buy-in

**Benchmark** | *Leadership and key staff at each partner organization are supportive of the partnership and the organization's participation in it.*

#### Guiding Questions

- Which leaders at each organization are supporters of our partnership?
- Are there individuals in each organization who either don't support the partnership or whose support is uncertain? How has this been addressed?
- To what extent have organizational leaders been involved in the design and/or implementation of the partnership?
- How do we communicate information about the partnership to organizational leaders? How often do staff implementing the partnership engage with organizational leaders?
- How would changes at the organizational leadership level affect the partnership?

#### Notes

#### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

## Service Alignment

**Benchmark |** *The services our partnership provides enable us to achieve our goals.*

### Guiding Questions

- How do these contribute toward our partnership's goals?
- Is our partnership in agreement about the target population we are serving? What is that target population?
- What additional services are needed by our target population? Are these services within the scope of our partnership's goals?

### Notes

### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

## Workflow Processes

**Benchmark |** *Our workflow processes allow the partnership to deliver services effectively and efficiently.*

### Guiding Questions

- In what ways do partners interact with each other?
- To what extent has the way our interaction been formalized through written or verbal agreements or protocols?
- In what ways do partners communicate about challenges or opportunities in delivering services? How often?
- How do current processes and protocols support our ability to adapt to changing target population demands and service delivery needs?

### Notes

### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

5

## Service Delivery Capacity

**Benchmark |** *We have the necessary time, people, and expertise to deliver effective services to our target population.*

### Guiding Questions

- What does our partnership's staffing model look like? How are staff from each organization involved in service delivery?
- What expertise is required to deliver services? Do current partners possess this expertise?
- What gaps in staff capacity and expertise impede our service delivery?
- Are there plans to make changes to services that require additional time, people, or expertise?

### Notes

### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

## Engaging the Community

**Benchmark |** *We engage our target population to inform and improve service delivery.*

### Guiding Questions

- How have we engaged our target population in developing our services? In what ways do we currently engage our target population?
- What mechanisms are in place to receive feedback from our target population?
- In what ways can we deepen our engagement with our target population to strengthen service delivery?
- Do we have the right relationships with community leaders to engage our target population? How can we leverage these relationships to improve our services?

### Notes

### Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		Developing		Well-Developed

## Partnership Check-Up Summary

Using your responses in the Partnership Check-Up, complete the summary chart below.

Internal & External Relationships	
Benchmark	Score (1-5)
<b>Shared Goals:</b> <i>My partner and I share an understanding of the goals our partnership seeks to achieve.</i>	
<b>Maximizing Partner Value:</b> <i>My partner and I bring complementary expertise to the partnership and maximize the unique value we each bring.</i>	
<b>Leveraging External Relationships:</b> <i>We fully leverage our relationships with the community, funders, and other professional networks to advance our partnership's goals.</i>	
<b>Internal Buy-in:</b> <i>Leadership and key staff at each partner organization are supportive of the partnership and the organization's participation in it.</i>	

Service Delivery & Workflow	
Benchmark	Score (1-5)
<b>Service Alignment:</b> <i>The services our partnership provides enable us to achieve our goals.</i>	
<b>Workflow Processes:</b> <i>Our workflow processes allow the partnership to deliver services effectively and efficiently.</i>	
<b>Service Delivery Capacity:</b> <i>We have the necessary time, people, and expertise to deliver effective services to our target population.</i>	
<b>Engaging the Target Community:</b> <i>We engage our target population to inform and improve service delivery.</i>	

Notes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.