Partnership Assessment Questionnaire

Partnership Rationale

- ✓ What process did we use to select the partner for this project?
- ✓ Is this a new partnership or have we already experienced some significant achievements through this partnership?
- ✓ Do we have a clear understanding of areas where we are dependent on the partnership to achieve our goals, and areas where we can achieve them better by working independently?
- ✓ What are the risks to either organization in this partnership?

Values

- ✓ Have we shared our individual organizational values, purposes, and priorities with each other? Are they complementary and compatible?
- ✓ How does this partnership fit with our respective organizational missions and long-term goals?
- ✓ How does the partnership benefit our prospective clients or beneficiaries?

Partnership Purpose and Objectives

- ✓ What is the purpose of the partnership? Do we have a common goal?
- ✓ Define the specific joint aims and objectives of the partnership. Are these realistic and measurable?
- ✓ What form does this partnership have? Is it a network, a strategic alliance, a joint venture, a partner-agent contract, or some other form of collaboration?
- ✓ Define success for this partnership. Do we have the same expectations of where early success in this partnership is most likely?

Trust, Commitment, and Ownership

- ✓ What is the current level of trust between our organizations? What specific experiences in the past have influenced feelings of trust or distrust?
- ✓ Is the level of trust high enough to encourage risk-taking?
- ✓ Are the purposes, vision, aims and objectives of the partnership fully shared by all levels of senior and operational management and are they firmly committed to them?

Roles and Responsibilities

- ✓ Clearly and jointly define and agree on the roles and responsibilities of each organization in the partnership, ensuring all critical activities are covered.
- ✓ Decide the frequency of monitoring of the partnership to ensure accountability of each partner.
- ✓ When will you need to modify projects and programs in response to actual experience?
- ✓ Jointly define the protocol used to identify when changes are necessary and ensure that modifications are adopted.

Partnership Strategy/Implementation

- ✓ Who provides leadership for the project?
- ✓ How will we work as partners on a practical level? Do we have the same understanding about the frequency, level and nature of the work?
- ✓ Do we have a clear awareness of any geographical or regional differences in the scope or operations of each partner and how this may affect the partnership? (For example, one partner may be a local organization and the other a multi-national).
- ✓ Have we defined clear service outcomes for each partner to other stakeholders?
- ✓ Who will be providing client service under the partnership?
- ✓ How will the key roles or functions of the partnership be filled to ensure it is successful?
- ✓ Are there clear lines of accountability for the performance of the partnership?
- ✓ Do we have similar views about the need to modify projects and programs in response to actual experience? What protocol will we use to identify when changes are necessary and ensure that modifications are adopted?

Contributions and Incentives

- ✓ What is the financial participation/contribution of each partner?
- ✓ What are the financial incentives or rewards offered to each partner?
- ✓ How is the risk and return of the project shared?
- ✓ What are the non-financial contributions of each partner?
- ✓ What are the technical skills or assets used in the partnership that each organization brings to ensure success?

Communication

- ✓ Do we feel able to communicate well with each other? Do we share a common vocabulary?
- ✓ Do we respect each other's differences and try to find mutually acceptable way to adapt to our differences?
- ✓ Do all project members, including all levels of management, participate in all critical decisions made in the partnership?
- ✓ Have we incorporated agreed forms of decision-making that are used to guide discussions?
- ✓ How do we communicate and publicise our partnership successes outside the partnership?

Reporting

- ✓ Clearly define the process and frequency of assessment and reporting for the project and partnership. What systems will we use for monitoring and evaluation of the program?
- ✓ How regularly will we schedule meetings to discuss the partnership activities?
- ✓ Do we share all monitoring and evaluation reports relevant to our partnership activities? Do we provide each other with open access to data, documents, programmatic reports, donor communications and other partnership records?
- ✓ Do we report to each other on all occasional and planned communications with external entities?

Termination

- ✓ What circumstances will lead to termination of the partnership?
- ✓ What is the process for termination?
- ✓ How will service to clients be maintained after termination?