**PARTNER ASSESSMENT FORM**

This tool should be used as a starting point for exploring a potential relationship by providing a basis for frank discussions with the key players involved at both senior and operational levels. It is designed to raise appropriate questions - not to provide definitive ‘screening’.

|  |  |  |
| --- | --- | --- |
| **DOES THE PROSPECTIVE PARTNER ORGANIZATION HAVE:** | **CURRENT STATUS**  A review of:   * What you know so far * The reliability of your sources of information * Whether you have enough information upon which to   base a decision | **FURTHER ACTIONS**  A note of:   * Further information required * Remaining concerns * Timetable and criteria for making a decision about suitability |
| 1. A good track record? |  |  |
| 2. Reasonable standing within their own sector? |  |  |
| 3. Reasonable standing from  other sectors and other key players? |  |  |
| 4. Wide-ranging and useful  contacts they are willing to share? |  |  |
| 5. Access to relevant resources and experience  that suit our needs? |  |  |
| 6. Skills and competencies that complement ours? |  |  |
| 7. Sound management and governance structures? |  |  |
| 8. A record of financial stability and reliability? |  |  |
| 9. A stable staff group? |  |  |
| 10. Sticking power when things get tough? |  |  |

# INTEGRITY CHECKLIST

## Individual leaders’ intentions, attitudes and commitments

* + Do I view the partnering approach as crucial to achieve our goals?
  + Do I believe that my partners want the partnership to succeed?
  + Am I committed to the outcomes of the partnership?
  + Am I willing to challenge my assumptions?
  + Do I value the differences among us?
  + Do I trust my partners to make appropriate decisions on my behalf?

## Individual leaders’ behaviors

* + Am I an advocate for the partnership approach?
  + Do I listen actively to my partners?
  + Do I adhere to the partnership’s principles? (e.g., equity, transparency, mutual benefit)
  + Do I seek and give helpful feedback from / to my partners?
  + Do I follow through on my commitments?
  + Do I show respect for my partners even when they are not present?
  + Do I support the development needs of my partners?
  + Do I acknowledge my partners for their accomplishments?

## Partnership’s mind-sets, values and norms

* + Do we share an understanding of the benefits and risks of partnering?
  + Are we aligned around a shared vision and shared values?
  + Do we freely share our ideas even when they are at odds with others?
  + Are we open to changing our viewpoint about other stakeholders?
  + Are we giving each other the benefit of the doubt?
  + Have we developed a culture of transparency among ourselves and around the partnership?
  + Are we continually looking for opportunities to learn, change, and improve?

## Partnerships’ structures, systems and strategies

* + Is our partnering agreement clear and well understood by everyone?
  + Are incentives in place for the partners to think and act for the benefit of the partnership?
  + Do we have the skills, competencies and technologies to succeed in our joint efforts?
  + Do we have the structures and ground rules in place to work effectively together?
  + Are we freely sharing information with our stakeholders?
  + Are our strategic priorities clear to everyone concerned?
  + Do we set and respect high standards of quality in everything we do?
  + Are we bringing the best and most complementary resources to form the partnership?

# CAPACITY & SKILLS ASSESSMENT

This questionnaire is designed for individuals involved in partnerships to assess their own partnering skills in order to build confidence about skills, strengths and strategies to address any skills weaknesses. It can be used by the partners as a group to build a picture of the competencies within the partnership and to identify which individual is best equipped to undertake which tasks / roles. It can also be a tool for enabling partners to recognize when specific skills might need to be brought in from outside the partnership.

**Capacity Assessment**

|  |  |  |
| --- | --- | --- |
| **KEY ROLES IN**  **PARTNERSHIPS** | **Assessment of current**  **capacity in this area** | **Strategy for improvement**  (if necessary) |
| Partnership Coordination | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Awareness raising | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Co-ordination / Administration | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Relationship management | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Resource mobilization | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Project Planning | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Project Management | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Communications | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Monitoring | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Other (specify) | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |

**Skills Assessment**

|  |  |  |
| --- | --- | --- |
| **KEY ROLES IN**  **PARTNERSHIPS** | **Assessment of current**  **capacity in this area** | **Strategy for improvement**  (if necessary) |
| Negotiation | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Mediation | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Facilitation | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Synthesizing information | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Coaching / capacity-building | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Institutional engagement | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Institution-strengthening | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Evaluating / reviewing | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |
| Other (specify) | ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 |  |