PARTNERSHIP
SELF-ASSESSMENT
TOOL

WELCOME TO THE PARTNERSHIP SELF-ASSESSMENT TOOL!

This easy-to-use, reliable, web-based Tool gives partnerships an exciting new way to assess how well their collaborative process is working and to identify specific areas they can focus on to make the process work better. The Tool is being provided to partnerships at no charge by the Center for the Advancement of Collaborative Strategies in Health at The New York Academy of Medicine with funding from the W. K. Kellogg Foundation. Below, we describe:

Why this Tool is needed
How the Tool was developed
Who should use the Tool
How the Tool works
What the Tool can do for partnerships
How partnerships can register to use the Tool

Why the Partnership Self-Assessment Tool is Needed

Partnerships are very valuable because the collaborative process brings different kinds of people and organizations together, making it possible for them to accomplish much more than they can on their own. Running a successful collaborative process is more easily said than done, however, particularly when a partnership involves participants from very different backgrounds, like professionals, service providers, and community residents directly affected by problems. Because of the tremendous difficulties involved, many partnerships are struggling to make the most of their collaborative potential. Moreover, other than assessing whether or not they achieve their ultimate goals, most partnerships lack a reliable way to determine how well their collaborative process is working or what they can do to make it work better.

The Partnership Self-Assessment Tool was designed to meet these needs. It helps partnerships:

- Understand how collaboration works and what it means to create a successful collaborative process

- Assess how well the collaborative process is working

- Identify specific areas they can focus on to make the collaborative process work better

How the Partnership Self-Assessment Tool was Developed

A successful collaborative process enables a group of people and organizations to combine their complementary knowledge, skills, and resources so they can accomplish more together than they can on their own. We call this unique combining power "partnership synergy." The synergy that a partnership achieves through a successful collaborative process is not just an exchange of resources among participants. Together, the participants create something new and valuable — a whole that is greater than the sum of its parts. When a collaborative process achieves a high level of synergy, the partnership is able to think in new and better ways about how it can achieve its goals; carry out more comprehensive, integrated interventions; and strengthen its relationship with the broader community. By enabling a partnership to think and act in ways that go beyond the capacities of its individual participants, synergy makes all of the time and effort involved in collaboration worthwhile.[1]

[1] To find out more about the Center's synergy framework, go to www.cacsh.org to request a copy of "Partnership Synergy: A Practical Framework for Studying and Strengthening the Collaborative Advantage" in *The Milbank Quarterly* 79(2): 179-205, 2001.

In 2001, the Center conducted the National Study of Partnership Functioning.[2] This methodologically rigorous study of 63 partnerships throughout the United States (involving 815 partnership participants) was designed to determine the extent to which partnerships achieve synergy and to identify the factors that influence the ability of partnerships to maximize synergy. The study indicated that partnerships with a high level of synergy have a special kind of leadership, which promotes productive interactions among diverse participants, as well as the ability to make good use of their participants' in-kind resources, financial resources, and time (which we call partnership efficiency). The study also found high levels of synergy to be related to certain kinds of administration and management capacities, which are very different from bureaucratic forms of management, and to the ability of partnerships to obtain sufficient non-financial resources from their participants (e.g., their skills, information, connections to people and groups, endorsements, and convening power).

What the Tool Measures

Building on the instruments and findings of the National Study of Partnership Functioning and working closely with people actively involved in partnerships, the Center developed the Partnership Self-Assessment Tool to give partnerships an easy way to find out how well their collaborative process is working.

> The Tool measures a key indicator of a successful collaborative process — the partnership's level of **synergy**. The Tool also provides information that helps partnerships take action to improve the collaborative process.
>
> It identifies the partnership's strengths and weaknesses in areas that are known to be related to synergy — **leadership**, **efficiency**, **administration and management**, and **sufficiency of resources**.

[2] A paper about this study is currently in press in *Health Education & Behavior*. Additional information about the study is available at www.cacsh.org

It also measures partners' perspectives about the partnership's **decision-making process**, the **benefits and drawbacks** they experience as a result of participating in the partnership, and their overall **satisfaction** with the partnership. Acting on this information can help partnerships be more successful in recruiting and retaining a broad array of partners.

Who Should Use the Partnership Self-Assessment Tool

The Partnership Self-Assessment Tool is designed to be used by a broad array of partnerships. The measures are applicable to partnerships focusing on **any** kind of goal — not only those related to health — and to partnerships that bring together **all** combinations of people and organizations.

Nonetheless, the Tool is not meant for partnerships at all stages of development or partnerships of all sizes. A partnership needs to:

Have been in existence **at least six months**

Be a group of people and organizations that **continually work together to develop and modify strategies to achieve their goals**

Have **begun to take action to implement its plans**

Have **at least five active partners**

The questions in the Tool may be difficult for partners to answer, and the findings may not be reliable, if these conditions are not met.

A partnership should use the Tool if it wants to:

See how well its collaborative process is working

Learn how it can make its collaborative process work better — when it still has time to take corrective action

Document the “hidden” strengths of its collaborative process to partners, funders, and the community

Make the partnership more responsive to its partners and the broader community

Get partners more involved in the leadership and management of the partnership

How the Partnership Self-Assessment Tool Works

The Partnership Self-Assessment Tool is entirely web-based. It can be accessed from **any** computer with an Internet connection. Partnerships **do not have to pay** to use the Tool, but partnerships **must be registered** to use the Tool by the person who coordinates the activities of the partnership.

The Tool consists of two parts — the questionnaire and the report.

The questionnaire is an on-line form that enables a partnership to collect valid, reliable, and useful data from its participants with very little time and effort. **Every participant who is familiar with the way the partnership works** should be asked to complete the questionnaire.

The coordinator and other participants in the partnership fill out the questionnaire privately, over the Internet, on their own time. Respondents provide information **anonymously**; each person receives a unique partner ID that is not attached to her/his name. The time investment for each respondent is relatively minimal – **the questionnaire takes only about 10 minutes to complete**. Respondents do not need to complete the questionnaire in one sitting; they can answer some of the questions, save what they have done, and return to the questionnaire later to finish it.

In addition to collecting data, the Partnership Self-Assessment Tool analyzes the data from the questionnaires automatically, and generates a tailored, action-oriented report that documents and explains the strengths and weaknesses of the partnership. The report is made available in .PDF format so that it can be easily printed and distributed.

At least 65% of the partnership participants asked to complete the questionnaire must do so within a 30-day period for a report to be produced. To help partnerships achieve this response rate, the Tool sends an automatic e-mail reminder to coordinators before the 30-day period has elapsed to inform them of the partnership's progress.

What the Partnership Self-Assessment Tool Can Do for Partnerships

The Partnership Self-Assessment Tool provides partnerships with **credible information**. Because the Tool is web-based and respondents' answers are anonymous, partners are able to express themselves in ways they might not feel comfortable doing otherwise. The Tool is methodologically rigorous, using valid and reliable data from multiple respondents. The data are analyzed objectively by a source external to the partnership.

Because the report generated by the Tool has substantial legitimacy, partnerships can use the Tool to support a variety of activities, including evaluation and continuous improvement, empowerment of partners, and reporting to funders and the broader community.

For example:

Used at an early stage, before the partnership expects to achieve its ultimate goal, the Tool enables a partnership to determine **how well its collaborative process is working** and to **identify corrective actions** that can help it realize the full potential of collaboration.

Used repeatedly, the Tool allows a partnership to **track changes over time** and see the impact of its efforts to improve the collaborative process.

The Tool enables a partnership to get **ongoing, systematic, and honest feedback from its partners.** By giving participants a way to express themselves anonymously about issues they care about, the Tool can help a partnership become **more responsive** to its partners.

The Tool provides people in a partnership with a **framework for talking** about the collaborative process. This kind of dialogue can broaden partner involvement in, and **strengthen the effectiveness of, partnership leadership and management**.

How Partnerships Can Register to Use the Partnership Self-Assessment Tool

Before registering the partnership, it is important to make sure that the Partnership Self-Assessment Tool is appropriate for your partnership (see Who Should Use the Partnership Self-Assessment Tool section on p. 4). The Tool must also be something that people in the partnership want, and are willing to use. Consequently, we encourage partnership participants to read and discuss the information in this document before proceeding.

Registering a partnership to use the Partnership Self-Assessment Tool is quick and easy. The person who coordinates the activities of the partnership fills out a short questionnaire and is then sent a return "registration e-mail" containing information that is necessary to access the Tool.

Go to www.PartnershipTool.net/registration.htm to register your partnership to use the Tool or check out www.PartnershipTool.net to obtain additional information.