



## STAR PARTNERSHIP ASSESSMENT TOOLKIT

### OVERVIEW

This tool provides a resource for partnering institutions to self-assess and identify areas within the partnership that may need development. The assessment does not convey “passing” or “failing” but rather provides a forum for identifying, discussing and resolving issues within a partnership. The questionnaire touches upon various areas within a partnership, but the main utility of this Partnership Assessment Toolkit (PAT) stems from the “pause and reflect” moment, the discussion with your partner and creation of an action plan.

The PAT contains a questionnaire with numerous self-assessment statements that correspond to key components for a well-functioning, equitable partnership. The PAT can be used at any stage of a partnership, but users may find Part I of the questionnaire especially useful early in the collaboration as the partnership’s foundations are being formed. It is highly recommended that these foundational aspects of the partnership be documented in written agreement between partners, such as a Memorandum of Understanding (MOU). See the PAT Companion Document for more information about how this tool was developed, the theory behind it and a list of references. Click here to download a Word version of a MOU template.

### INSTRUCTIONS

The questionnaire is designed to be used at any stage of the partnership. It is recommended to complete Part I, Partnership Foundations, at the beginning of a partnership or before the partnership is formalized so that structural issues can be identified and addressed early in the partnership. Parts II & III, Partnership Functioning and Partnership Outputs, may also be taken early in the partnership, but it is more beneficial to take it once the activities have started.

To allow for more meaningful dialogue, each partner should initially complete their own questionnaire before results are discussed and compared. During this step, it is recommended that each partnering institution select an individual from their respective organization who can document and synthesize their institution’s responses. The “Notes” section within the questionnaire can be used to write down any thoughts your organization may have about each statement at any point during this process.

Once each partner has independently assigned a value for each answer, schedule a meeting to compare and discuss your answers with your partner. If possible, having a third-party neutral facilitator may be helpful during this discussion, especially if a power imbalance exists between the two parties. You may refer to the discussion guide that follows this toolkit to aid with the reflection process.

Lastly, use Part V to create an action plan to address the issues identified during this reflection process.

### IN SUMMARY, TO USE THE PAT:

1. Select an individual from each respective partnering institution to document each institution’s responses to the toolkit statements. Multiple people from the same organization can help respond to the statements, but the feedback should be synthesized

and documented into one questionnaire per partner organization. Each partner organization should complete their own questionnaire. The questionnaire is the scoresheet itself, so it is not necessary to total any scores. While documenting the responses, add any thoughts to the “Notes” column.

- a. If work towards the partnership objectives has not yet begun, we recommend completing Parts I, IV and V only. Many of the statements in Parts II & III may not be applicable until work on partnership’s activities has begun.
  - b. If work towards the partnership objectives has begun, and this is the first time using this toolkit, we recommend completing all parts of the toolkit.
2. Hold a meeting between the partners to compare and discuss each answer. If possible, have a neutral, third-party facilitate this discussion. We especially recommend having a facilitator if there is a large power imbalance between partners. Maintaining an open and respectful environment is key to getting an honest and fruitful discussion. Consider using the discussion questions at the end of the document to help guide the conversation.
  3. With your partner, mutually decide on next steps based on the discussion. Use Part V of this toolkit to document the plan. Consider scheduling the next PAT reflection meeting during this time.

# QUESTIONNAIRE

DATE COMPLETED: \_\_\_\_\_ SECTIONS COMPLETED: \_\_\_\_\_

NAME OF PARTNERSHIP OR PARTNERSHIP TYPE: \_\_\_\_\_

YOUR ORGANIZATION'S NAME: \_\_\_\_\_

PARTNERING ORGANIZATION'S NAME: \_\_\_\_\_


## Part I: Partnership Foundations

Identifying and collaboratively agreeing on the partnership's inputs and policies are an important first step towards establishing an environment for partners to work together effectively. We recommend that this section be utilized early in the partnership or when partnership policies are being developed or revisited. The statements below assess components of a partnership's foundations, the strength of a partnerships' resources as well as coherence of partners' mission inputs.

### Bergen Model for Collaborative Functioning Inputs: Mission, Partner Resources, and Financial Resources

According to the Bergen Model for Collaborative Functioning (see the companion document for more information), inputs are the resources, tangible and intangible, that partners contribute towards the partnership. They include 1) the mission (the goals and objectives of the partnership); 2) partner resources, which can include skills, connections, time; and 3) financial resources such as funding and equipment. Sharing a mission and goals is important to ensure a good fit and was also identified in STAR's literature review as a common ingredient for a successful partnership. Identifying the resources available to the partnership is important for transparency reasons and for addressing any resource needs early-on in the partnership. Once identified, setting expectations for how resources will be shared equitably between partners is also important and a factor that contributes towards partnership success.


Assessment Statement		Score	Notes
1	There is a shared vision for the partnership.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
2	Partners are committed to the partnership's mission.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
3	The partnership's goals are mutually beneficial.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
4	 Partnership objectives are <u>SMART</u> (specific, measurable, achievable, relevant, and time-oriented).	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
5	Partnership objectives are aligned with the partners' priorities.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
6	Partners collaboratively developed the terms in the implementation plan that outlines how partnership objectives will be achieved.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
7	Partners have mutually agreed on capacity-building objectives within the partnership.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
8	Outcome indicators of the partnership have been developed in a collaborative manner.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
9	A partnering agreement (such as a Memorandum of Understanding) is well understood by everyone involved in the partnership.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
10	There is an agreed-upon process for making changes to the partnering agreement.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
11	Partners have the necessary human resources to pursue the partnership's objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
12	Partners have the necessary time to pursue the partnership's objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
13	Partners have the necessary equipment to pursue the partnership's objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
14	Partners have the minimal monetary resources necessary to pursue the partnership's objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
15	Partners have the necessary technological resources to pursue the partnership's objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
16	Resource sharing expectations are clear between partners.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
17	The partnership can operate independently without the presence of specific individuals. (E.g., there is not a situation where one person in the partnership holds unique knowledge that could not be replaced if they were to leave the organization.)	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
18	Plans regarding ownership of the outcomes and data of the project have been developed in an equitable manner.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

	Assessment Statement	Score	Notes
19	There is an identifiable end to the partnership (i.e., factors that would signify that the work is complete have been identified). 	<ul style="list-style-type: none"><li><input type="checkbox"/> <b>5:</b> Strongly Agree</li><li><input type="checkbox"/> <b>4:</b> Agree</li><li><input type="checkbox"/> <b>3:</b> Neutral</li><li><input type="checkbox"/> <b>2:</b> Disagree</li><li><input type="checkbox"/> <b>1:</b> Strongly Disagree</li><li><input type="checkbox"/> <b>N/A:</b> Not Applicable</li></ul>	



## Part II: Partnership Functioning

Once partnership policies, expectations, and resources are determined, partners begin their work towards their stated objectives. We recommend that this section be used once work towards the partnership objectives has begun, and that it be used periodically as a “pause & reflect” moment to foster continual improvement and learning within the partnership. The statements below are designed to assess the everyday functioning and satisfaction within the partnership.

### Bergen Model for Collaborative Functioning Collaborative Context: Leadership, Communication, Roles/Structures, and Input Interaction

According to the Bergen Model, the collaborative context describes how the inputs (identified in Part I) along with leadership, communication, and roles/structures interact with each other to positively or negatively reinforce partnership functioning for its production and maintenance tasks. Production tasks are the objectives and activities of the partnership while maintenance tasks refer to the administrative activities needed to sustain the partnership.

Assessment Statement		Score	Notes
1	Major partnership decisions are made in a collaborative manner.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
2	Partners appropriately take into consideration each other’s different cultures.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
3	Partners are flexible in adapting to change.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
4	There is a process for resolving conflicts between partners.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
5	The partnership's monetary resources are equitably shared between partners.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
6	Intellectual property, such as data, is maintained transparently between partners.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
7	Intellectual property, such as data, is shared equitably between partners.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
8	Partner roles are clear.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
9	Partner expectations are clear.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
10	The partnership's structure is conducive to collaborative engagement.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
11	Partners adhere to the partnership's principles.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
12	Partners feel empowered to freely share ideas.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
13	Partners feel empowered to bring up issues within the partnership.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
14	Senior leadership is committed to the partnership's outcomes.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
15	Partners are satisfied with how conflicts are resolved within the partnership.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
16	Partners are satisfied with the frequency of communication between each other.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
17	Partners are satisfied with the quality of communication between each other.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
18	Partners mutually respect one another.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
19	Partners mutually trust one another.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
20	Partners support one another.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
21	Partners acknowledge each other's contributions towards the partnership.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
22	The partnership is regularly monitoring progress towards the SMART objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
23	Partners are satisfied with progress made towards the objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

## Part III: Partnership Outputs

The statements below relate to the outputs of the partnerships.

### Bergen Model for Collaborative Functioning Collaborative Context: Outputs

The final component of the Bergen Model are the outputs, which are categorized into synergistic, antagonistic, and additive results. Synergistic results occur when the benefits of the partnership outweigh its costs; antagonistic results are the opposite, when the costs of the collaboration outweigh the benefits; lastly, additive results occur when the benefits and costs of the partnerships are equal.

Assessment Statement		Score	Notes
1	Partners are satisfied with progress made towards the objectives.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
2	The benefits of the partnership outweigh its costs.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
3	The partnership project is sustainable or there is a plan to make the project sustainable once the partnership term ends.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	
4	The partnership project is scalable or there is a plan to make the project scalable.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	

Assessment Statement		Score	Notes
5	A system or plan exists to report the outcomes of the partnership.	<input type="checkbox"/> <b>5:</b> Strongly Agree <input type="checkbox"/> <b>4:</b> Agree <input type="checkbox"/> <b>3:</b> Neutral <input type="checkbox"/> <b>2:</b> Disagree <input type="checkbox"/> <b>1:</b> Strongly Disagree <input type="checkbox"/> <b>N/A:</b> Not Applicable	



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## Part IV: Discussion Section

What are the areas with the highest scores, e.g., those areas that scored four and above? For each area identified, list the individual partner contributions that promotes this success.

What are the least developed parts of the partnership, e.g., those areas that scored two and under? For each area identified, list the individual partner factors that contribute to the low scores.

How will this information affect future partnership activities? What actions are needed to address the issues identified during this discussion? (see Part V for a framework for creating an action plan based on your responses).

What available resources (either within or outside the partnership) could be utilized to address the gaps identified?





## Part V: Developing an Action Plan

If your partnership has identified any issues, develop an action plan to address them using the steps and template below. [Click here to download the Word version of the template.](#)

1. Identify the priority problem. If there are multiple, complete an action plan for each priority problem identified.
2. Identify the root cause(s). Note that there may be multiple per problem.
3. Identify what actions are going to be taken to respond to each of the identified root causes. For each action, make sure to assign a target date, identify the person(s) responsible for managing the action and identify how progress towards this resolution will be measured or tracked.
4. Report periodically on whether the improvement objective has been achieved.

<b>Date Completed:</b>				
<b>Priority Problem:</b>				
<b>Root Cause(s):</b>				
<b>Action 1</b> (at least one per identified root cause):	Measured By:	Target Date:	Person(s) Responsible:	Reassessment Date:
<b>Action 2</b> (at least one per identified root cause):	Measured By:	Target Date:	Person(s) Responsible:	Reassessment Date:
<b>Action 3</b> (at least one per identified root cause):	Measured By:	Target Date:	Person(s) Responsible:	Reassessment Date: