

Partnership health check

Use: To review the ‘health’ of the partnership, determining areas for discussion and improvement

Partnering phase: Implementation

Monitoring the health and therefore the efficiency of the partnership’s setup, operation and processes is as important as monitoring its achievements. This tool sets out a set of indicators of partnership “good health”, together with a suggested approach for the partnership to collectively undertake a review workshop. Both the indicators and the approach should be agreed either at the outset of the partnership (or at the review point for existing partnerships), in a process involving all partners. This process will also help to set up expectations and a framework of good practice for the partnership.

Pre-workshop

Ask all partners to complete the checklist below, providing their opinion on where the partnership sits relative to each aspect of good practice in partnering: Green – no concerns; Amber – some concerns; Red – serious concern

Analyse the results to prioritise the areas for discussion at the workshop

At the review workshop

Agree ‘ground rules’ to encourage openness and participation, making it clear that the review is not

about judgment or blame, but a positive opportunity to bring up issues, learn together and improve the partnership;

Present the checklist analysis, jointly talk through each partnering aspect and the positive experiences or the challenges partners may have around it;

Aim to fully understand and appreciate your cross-organisational perspectives or other sources of diversity;

Talk through how each aspect of partnering could be either further enhanced or meaningfully improved to the satisfaction of all partners, and prioritize;

Determine what actions should be undertaken, by whom (wherever possible by more than one partner) and by when.

Post review workshop

Undertake the agreed actions, conferring with partners, keeping all informed on progress;

Confirm with partners that the aspects have improved.

Partnership Health Indicators

| LEADERSHIP | | | |
|--|---|---|---|
| The partnership’s goals are well articulated, including externally | • | • | • |
| Partners are motivated and inspired towards the common goal | • | • | • |
| Partners feel empowered and enabled | • | • | • |
| Conflicts of interest are managed effectively | • | • | • |
| REPRESENTATION | | | |
| Partners are regularly and consistently present at meetings | • | • | • |
| Representation is at an appropriately senior level | • | • | • |
| SUFFICIENCY OF RESOURCES – the partnership has sufficient access to: | | | |
| General skills, e.g. communication and organisational skills | • | • | • |
| Technical skills | • | • | • |
| Partnering and other relevant experience | • | • | • |
| Important networks or spheres of influence | • | • | • |
| Facilities, e.g. office and meetings space, equipment | • | • | • |
| Financial or other resources | • | • | • |

| ROLES AND RESPONSIBILITIES | | | |
|--|---|---|---|
| The partnership's goals are well articulated, including externally | ● | ● | ● |
| Partners are motivated and inspired towards the common goal | ● | ● | ● |
| Partners feel empowered and enabled | ● | ● | ● |
| MEETING PROCESSES | | | |
| Meetings happen with appropriate frequency | ● | ● | ● |
| Setting of agendas and arrangement of meeting logistics ensures inclusivity of all partners | ● | ● | ● |
| Meetings are documented appropriately and minutes circulated | ● | ● | ● |
| Meetings are followed up by action | ● | ● | ● |
| WORK PROCESSES | | | |
| Deliverables and timeframes are clear | ● | ● | ● |
| Individuals take responsibility for their deliverables | ● | ● | ● |
| Process for receiving/distributing funding is effective | ● | ● | ● |
| Communication and documentation processes is effective | ● | ● | ● |
| Monitoring and reporting process is effective | ● | ● | ● |
| COMMUNICATION AND TRANSPARENCY | | | |
| There is clarity around joint objectives at the start of the process and beyond | ● | ● | ● |
| Communication of all kinds is sufficiently frequent | ● | ● | ● |
| Information is accessible | ● | ● | ● |
| Documentation supports partners in making decisions | ● | ● | ● |
| Partners are transparent about their assumptions, goals, needs, drivers and constraints | ● | ● | ● |
| TRUST AND TEAMWORK | | | |
| There is trust in the partnership | ● | ● | ● |
| Partners understand each other's points of view or interests, and are clear about each other's motivations | ● | ● | ● |
| Partners can rely on each other to complete agreed tasks | ● | ● | ● |
| Partners offer to help each other and collectively solve problems | ● | ● | ● |
| PARTNERSHIP ADAPTATION AND SUSTAINABILITY | | | |
| The partnership is conscious of and remains relevant to the context | ● | ● | ● |
| The partnership makes adjustments based on its experiences to date | ● | ● | ● |
| The partnership is achieving its goals (or is on course to do so) | ● | ● | ● |
| Partner organisations are individually getting value from involvement | ● | ● | ● |