Partnership health check

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

**Partnering phase:** Implementation

Monitoring the health and efficiency of the partnership’s setup, operation and processes is essential to optimise partnership impact.

Parts of the framework can be used informally and regularly – for example every few months – as a prompt for discussion in partner meetings to help keep the partnership on track.

Below is the description for a more formal review workshop that could be held every year. Where there are many partners, or where there are significant issues raised, an external facilitator might be appropriate.

**Review workshop: preparation**

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**

<table>
<thead>
<tr>
<th>1. FUNDAMENTALS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior leaders within partner organisation are championing the partnership, internally and externally</td>
<td>-</td>
</tr>
<tr>
<td>Key individuals have partnering mindset and skillset</td>
<td>-</td>
</tr>
<tr>
<td>There is complete buy-in from all partners towards the partnership’s vision and goals</td>
<td>-</td>
</tr>
<tr>
<td>The partnership has been set up to create added value and deliver more than the sum of its parts</td>
<td>-</td>
</tr>
<tr>
<td>The partnership has been set up to deliver net value to all partners</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. PARTNER RELATIONSHIP</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Partners are transparent about their assumptions, goals, needs, drivers and constraints</td>
<td>-</td>
</tr>
<tr>
<td>There is a high level of trust among the partners</td>
<td>-</td>
</tr>
<tr>
<td>Partners are empowered and there is clear equity and balance among the partners in decision-making</td>
<td>-</td>
</tr>
<tr>
<td>Partners are accountable to each other for delivering on their commitments</td>
<td>-</td>
</tr>
<tr>
<td>Challenges, problems and tensions are openly brought up and dealt with respectfully and collectively</td>
<td>-</td>
</tr>
<tr>
<td>Partners are jointly accountable for partnership delivery and will help out other partners to deliver</td>
<td>-</td>
</tr>
</tbody>
</table>
### 3. STRUCTURE AND SET-UP

The partnering agreement clearly sets out the fundamentals of the partnership (including the vision and objectives, why each partner is involved, the intended value creation, overall approach; commitments, resources, roles and responsibilities of each partner)

- - -

There is a clear theory of change for the partnership, along with a measurement framework to be able to demonstrate progress and success

- - -

The fiduciary / legal structure for the partnership is fit for purpose

- - -

The governance structure for the partnership is fit for purpose

- - -

The management structure for the partnership is fit for purpose

- - -

#### RESOURCES

- External (non-partner) individuals are supporting / championing the partnership
- Personnel are available
- Finance is available
- Knowledge and data are available
- Important networks or spheres of influence are leveraged
- Other necessary resources are available
- Partnership facilitation / troubleshooting / brokering is available

### 4. MANAGEMENT AND LEADERSHIP

- Iterative approach to project management, focused on value creation
- All relevant partner resources are being applied
- Communication of all kinds is sufficiently frequent
- Roles and responsibilities are always clear
- Deliverables and timeframes are always clear
- Financial management, including process for receiving/distributing funding, is effective
- Monitoring and reporting processes are effective
- Information sharing is effective
- The partnership vision remains compelling and relevant to the context
- The partnership undertakes regular ‘health checks’ and iterates and adjusts its approach based on experiences to date
- The partnership is, or is on course, to itself becoming sustainable or delivering sustainable outcomes
- Cultural differences between organisations are well managed and clashes avoided where possible
- Partners remain fully committed to the partnership
- Partners are demonstrating collective leadership of the partnership
- The partnership has been institutionalized into each partner organisation (i.e. engaged key staff, built into organisational planning and budgets etc.)

### MEETINGS AND WORK 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
- Conflicts of interest are effectively managed
- Partners are regularly and consistently present at meetings and represented by appropriately senior level
- Decisions are made in a timely and efficient way