Partnership Assessment Tool for Health

Welcome to the Partnership Assessment Tool for Health (PATH). This resource is intended for community-based organizations (CBOs) that provide human services and healthcare organizations currently engaged in a partnership. For the purposes of this tool, we define partnership as **a structured arrangement between a healthcare organization** (e.g. health system, hospital, provider, insurer, state or local public health department) **and nonprofit or for-profit community-based organization** (e.g. housing organization, workforce development agency, food bank, early childhood education provider) **to provide services to low-income and/or vulnerable populations**.

The objective of the PATH is to help partnering organizations **work together more effectively to maximize the impact of the partnership**. As your partnership continues serving the community, open and honest dialogue around strengths, gaps, challenges, and opportunities is essential for partners to stay aligned, focus communications, prioritize changes, leverage opportunities, identify needs, and more. These types of conversations require dedicated time and can be challenging. The tool provides an approachable format to understand progress toward benchmarks characteristic of effective partnerships, to identify areas for further development, and guide strategic conversation between partners.

Developed by **Partnership for Healthy Outcomes**

Bridging Community-Based Human Services and Healthcare

A collaboration of

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Where Money Meets Mission

CHCS
Center for Health Care Strategies, Inc.

Alliance
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Robert Wood Johnson Foundation

What will I find in this tool?

- **Partnership Check-Up:** While there are multiple ways in which you and your partner can work together for greater community impact, this questionnaire explores your partnership's progress toward key benchmarks characteristic of effective partnership. Benchmarks are organized into four core themes: Internal & External Relationships, Service Delivery & Workflow, Funding & Finance, and Data & Outcomes. The final page of the check-up provides a summary chart to synthesize your responses and identify your 3-5 greatest areas for development.

- **Partner Discussion Guide:** To strengthen your partnership moving forward, the questions in this section begin to guide you and your partner in naming potential next steps to progress toward specific benchmarks.

Who should fill out this tool?

This tool is designed for use by two partner organizations (a CBO and a healthcare organization) who are actively engaged in a partnership with established goals and services. While designed for use by two partnering organizations, we also encourage organizations engaged in partnerships involving more than two partners to use the tool.

We recommend that staff who are deeply engaged in the partnership within each organization complete the tool. This may include a mixture of service delivery staff (e.g. Care Coordinators, Social Workers, and Direct Service Delivery Staff) and key business and administrative leadership (e.g. CEO, CFO, Community Benefits Director, Project Manager, etc.) from each partner, and will likely vary from partnership to partnership.

How do I complete the tool?

Step 1: You and representatives from your partner organization will first complete the Partnership Check-Up, either individually or together. For each benchmark statement, consider the guiding questions to make an assessment of your partnership's progress toward the benchmark, on a scale of "needs development" to "well-developed" (1-5). Use the notes section to capture key ideas, stories, and examples related to each benchmark.

Step 2: Fill out the summary chart at the end of the Partnership Check-Up, based on your assessment. Together with your partner organization, review the summary chart results. A series of discussion questions has been provided to facilitate conversation around areas of alignment and divergence.

Step 3: Use the Partner Discussion Guide to focus on the 3-5 areas requiring more development. The following questions provide a starting point for identifying next steps to strengthen your partnership.

Additional Tools

The PATH is a resource specifically designed for organizations involved in an established partnership. A variety of other tools exist to help partnerships and individual organizations at different levels of maturity and in different situations and contexts. See the Appendix for a list of additional tools related to advancing CBO-healthcare partnerships.

Internal & External Relationships

A core element of effective partnership is having strong relationships among partners and with other stakeholders, like funders and the community. This section focuses on your partnership's progress towards internal and external relationship benchmarks.

Shared Goals

Benchmark | *My partner and I share an understanding of the goals our partnership seeks to achieve.*

Guiding Questions

- Why are we partnering? What need and specific population is our partnership designed to address?
- How often do we check-in about our goals of the partnership and our progress toward these goals?
- Are our goals we've set forth for our partnership achievable within a reasonable timeframe?
- What are we not trying to achieve through our partnership? What needs and activities are beyond the scope of this partnership?
- How have our goals evolved as the partnership has evolved?

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Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Maximizing Partner Value

Benchmark | *My partner and I bring complementary expertise to the partnership and maximize the unique value we each bring.*

Guiding Questions

- What value—including skills and expertise—does each partner contribute to the partnership?
- Is there a balanced sharing of resources in our partnership?
- Are there other ways each partner can contribute to the partnership?
- What additional skills and expertise are needed to achieve our partnership's goals? Do partners currently possess these skills?

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Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Leveraging External Relationships

Benchmark | *We fully leverage our relationships with the community, funders, and other professional networks to advance our partnership's goals.*

Guiding Questions

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- What external stakeholders support our partnership? Who are the external supporters of our partnership?
- How do external stakeholders contribute to our partnership?
- What opportunities exist to deepen our current external relationships?
- What other stakeholders could help to advance our efforts? How so?
- How will external relationships support the sustainability of our partnership as it evolves?

Assessment

Circle rating from 1-5:

1	**2**	**3**	**4**	**5**
Needs development		*Developing*		*Well-Developed*

Internal Buy-in

Benchmark | *Leadership and key staff at each partner organization are supportive of the partnership and the organization's participation in it.*

Guiding Questions

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- Which leaders at each organization are supporters of our partnership?
- Are there individuals in each organization who either don't support the partnership or whose support is uncertain? How has this been addressed?
- To what extent have organizational leaders been involved in the design and/or implementation of the partnership?
- How do we communicate information about the partnership to organizational leaders? How often do staff implementing the partnership engage with organizational leaders?
- How would changes at the organizational leadership level affect the partnership?

Assessment

Circle rating from 1-5:

1	**2**	**3**	**4**	**5**
Needs development		*Developing*		*Well-Developed*

Service Delivery & Workflow

A core element of effective partnership is delivering appropriate services in a way that achieves the goals of the partnership. This section focuses on your partnership's progress toward service delivery and workflow benchmarks.

Service Alignment

Benchmark | *The services our partnership provides enable us to achieve our goals.*

Guiding Questions

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- How do these contribute toward our partnership's goals?
- Is our partnership in agreement about the target population we are serving? What is that target population?
- What additional services are needed by our target population? Are these services within the scope of our partnership's goals?

Assessment
Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Workflow Processes

Benchmark | *Our workflow processes allow the partnership to deliver services effectively and efficiently.*

Guiding Questions

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- In what ways do partners interact with each other?
- To what extent has the way our interaction been formalized through written or verbal agreements or protocols?
- In what ways do partners communicate about challenges or opportunities in delivering services? How often?
- How do current processes and protocols support our ability to adapt to changing target population demands and service delivery needs?

Assessment
Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

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Service Delivery Capacity

Benchmark | *We have the necessary time, people, and expertise to deliver effective services to our target population.*

Guiding Questions

- What does our partnership's staffing model look like? How are staff from each organization involved in service delivery?
- What expertise is required to deliver services? Do current partners possess this expertise?
- What gaps in staff capacity and expertise impede our service delivery?
- Are there plans to make changes to services that require additional time, people, or expertise?

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Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Engaging the Community

Benchmark | *We engage our target population to inform and improve service delivery.*

Guiding Questions

- How have we engaged our target population in developing our services? In what ways do we currently engage our target population?
- What mechanisms are in place to receive feedback from our target population?
- In what ways can we deepen our engagement with our target population to strengthen service delivery?
- Do we have the right relationships with community leaders to engage our target population? How can we leverage these relationships to improve our services?

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Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Funding & Finance

A core element of effective partnership is having a funding model that supports service delivery and enables the partnership to achieve outcomes. This section focuses on your partnership's progress toward funding and finance benchmarks.

Covering Full Cost

Benchmark | *We understand the full cost of partnership and incorporate this into our funding model.*

Guiding Questions
- What are the ongoing expenses of our partnership (e.g. staffing expenses, occupancy expenses, technology maintenance, etc.)?
- What are the periodic investment needs of our partnership (e.g. technology purchases, planning consultants, etc.)?
- How does the partnership plan for and/or manage unanticipated costs?
- What expense information do we share with our funders and/or payors?
- How do we anticipate our partnership costs changing over the next several years?

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Assessment
Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Securing Revenue

Benchmark | *We have reliable revenue streams sufficient to cover the full cost of partnership.*

Guiding Questions
- What sources of revenue—both ongoing and periodic—fund the partnership?
- How reliable is each source of revenue?
- Which revenue sources are we at risk of losing?
- What does each partner contribute in-kind to the partnership? Can our in-kind contributions continue at the current level?
- What sustainable revenue opportunities exist for our partnership over the next several years?

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Assessment
Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Financial Goals & Priorities

Benchmark | *My partner and I are aligned on the financial goals of our partnership, and understand each others' financial priorities.*

Guiding Questions

- Do partners have similar or different views on our partnership's path to financial sustainability?
- By participating in the partnership, what financial risk does each partner take on?
- What financial risks may arise as the partnership evolves?
- What is each partner's economic motivation for participating in the partnership?
- What has been the impact of our partnership on each partner's bottom line?
- Does our partnership expect to generate revenue and/or cost savings for each partner?

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Assessment

Circle rating from 1-5:

1	**2**	**3**	**4**	**5**
Needs development		*Developing*		*Well-Developed*

Additional Notes

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Data & Outcomes

A core element of effective partnerships is having the ability to collect and use data to inform decision-making and demonstrate outcomes. This section focuses on your partnership's progress toward data and outcomes benchmarks.

Data Collection

Benchmark | *The data our partnership collects accurately conveys progress toward our shared goals.*

Guiding Questions

- What data do we collect to understand our partnership's clinical and/or social impact? Is this data sufficient?
- What data do we collect to understand our partnership's financial impact? Is this data sufficient? Who decides what data to collect?
- What systems and people do we have in place to support data collection and sharing?
- How confident are we in the quality and integrity of our data?
- What can we learn from the data our partnership collects? In what ways does our data indicate progress toward our goals?
- What additional information do we need to understand progress toward our goals?

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Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Data Usage

Benchmark | *Our partnership uses the data we collect to improve the way we deliver our services.*

Guiding Questions

- How often do we review and discuss the data we collect?
- What systems and people do we have in place to analyze the data we collect?
- How have we used the data we collect to:
  - Inform changes to service delivery?
  - Improve how we work together as partners?
  - Engage external stakeholders?
- What additional opportunities exist for us to leverage data to improve our partnership?
- Has our data enabled us to adapt to changes in the external environment (e.g. policy, funding landscape, etc.)? If so, how?

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Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Demonstrating Outcomes

Benchmark | *We are able to demonstrate and articulate our outcomes using the data we collect.*

Guiding Questions
- What have been the outcomes of our partnership?
- How often do we review and discuss our partnership's outcomes?
- What systems and people support our ability to understand our outcomes?
- Which internal and external stakeholders do we share outcomes data with?
- How do we communicate our outcomes with these stakeholders?

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Assessment

Circle rating from 1-5:

1	2	3	4	5
Needs development		*Developing*		*Well-Developed*

Additional Notes

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Partnership Check-Up Summary

Using your responses in the Partnership Check-Up, complete the summary chart below.

Internal & External Relationships	
Benchmark	**Score (1-5)**
Shared Goals: *My partner and I share an understanding of the goals our partnership seeks to achieve.*	
Maximizing Partner Value: *My partner and I bring complementary expertise to the partnership and maximize the unique value we each bring.*	
Leveraging External Relationships: *We fully leverage our relationships with the community, funders, and other professional networks to advance our partnership's goals.*	
Internal Buy-in: *Leadership and key staff at each partner organization are supportive of the partnership and the organization's participation in it.*	

Service Delivery & Workflow	
Benchmark	**Score (1-5)**
Service Alignment: *The services our partnership provides enable us to achieve our goals.*	
Workflow Processes: *Our workflow processes allow the partnership to deliver services effectively and efficiently.*	
Service Delivery Capacity: *We have the necessary time, people, and expertise to deliver effective services to our target population.*	
Engaging the Target Community: *We engage our target population to inform and improve service delivery.*	

Funding & Finance	
Benchmark	**Score (1-5)**
Covering Full Cost: *We understand the full cost of partnership and incorporate this into our funding model.*	
Securing Revenue: *We have reliable revenue streams sufficient to cover the full cost of partnership.*	
Financial Goals & Priorities: *My partner and I are aligned on the financial goals of our partnership, and understand each others' financial priorities.*	

Data & Outcomes	
Benchmark	**Score (1-5)**
Data Collection: *The data our partnership collects accurately conveys progress toward our shared goals.*	
Data Usage: *Our partnership uses the data we collect to improve the way we deliver our services.*	
Demonstrating Outcomes: *We are able to demonstrate and articulate our outcomes using the data we collect.*	

Partner Discussion Guide

Together with your partner, take a moment to review your partnership check-up results and discuss the following questions:

1. In what areas is our partnership most developed?

2. What areas have the greatest need for development?

3. Are there results that surprised our partnership?

4. Where are our results aligned? Where are our results different?

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The benchmarks in the partnership check-up, specifically the ones with the lowest score, can serve as priority development areas for your partnership. In the space below, identify 3-5 benchmarks you and your partner believe are in most need of development.

1. _____

2. _____

3. _____

4. _____

5. _____

As you and your partner begin to develop next steps to advance toward the benchmarks identified above, consider the following questions as a starting point for strengthening your partnership:

- What resources or relationships already exist to help our partnership advance toward the benchmark? Consider both internal and external resources and relationships.
- What investments in the partnership are required to advance toward the benchmark? Consider:
    - Personnel (e.g. additional staff time, new expertise, consultants)
    - Systems (e.g. electronic health records, data collection software, CRM)
    - Facilities & Equipment (e.g. space, computers, telephones)
    - Relationship-Building (e.g. meetings, marketing, travel)
- On what timeframe is advancement of the benchmark achievable? Is this a short-term or long-term priority?
- How will advancing toward this benchmark drive our partnership to achieve our goals and improve desired outcomes?
- What opportunities will advancing toward this benchmark create? Consider both short-term and long-term opportunities.
- What risks or threats are associated with not advancing toward this benchmark? Consider both short-term and long-term risks or threats.
- Are there important benchmarks that have not been identified in completing this tool?

Appendix

NFF Healthy Outcomes Initiative

- **Nonprofit Readiness for Health Partnership:** This tool is designed to give an indication of a community based organization's readiness to engage in partnership with healthcare organizations to deliver outcomes related to social determinants of health. The purpose of the tool is to review key capacities likely required for successful outcomes-oriented partnerships, in an effort to identify the strengths and weaknesses an organization has, and to determine what capacity building and investment the organization may require before engaging in outcomes-oriented partnership arrangements. The tool is designed for self-assessment and internal use. It is not intended to evaluate potential partners. http://www.nff.org/fundamental/nonprofit-readiness-health-partnership

ReThink Health

- **Conditions for a Healthy System of Health:** This assessment captures 11 key conditions that together build momentum toward a transformed regional system of health over time. The learning objective is to understand those 11 key conditions, assess where you are in your efforts on each of the 11 conditions and identify areas of strength, improvement, and opportunity. https://www.rethinkhealth.org/wp-content/uploads/2015/08/developmental-assessment-803.pdf

Community Tool Box

- **Creating and Maintaining Partnerships:** This toolkit provides Guidance for creating a partnership among different organizations to address a common goal. http://ctb.ku.edu/en/creating-and-maintaining-partnerships
- **Developing a Framework or Model of Change:** This toolkit helps in developing a picture of the pathway form activities to intended outcomes. http://ctb.ku.edu/en/4-developing-framework-or-model-change

Practical Playbook

- **Building a Partnership:** This resource walks you step-by-step through the process of organizing & preparing, planning & prioritizing, implementing, monitoring & evaluating as well as sustaining your partnership project. https://www.practicalplaybook.org/section/building-partnership

World Health Organization

- **Partner Assessment Form:** A "prompter" enabling those creating a partnership to ask systematic questions of any potential partner to ensure a good fit with the goals/ needs of the partnership. This tool should be a starting point for exploring potential relationships by providing a basis for frank conversation. www.who.int/management/partnerships/overall/Partnership%20tools-en.doc

Aging and Disability Business Institute

- **Readiness Assessment Tool:** This readiness assessment tool guides your organization through the process of successfully preparing for, securing and maintaining partnerships with the health care sector, allowing your organization to assess the current readiness of your organization, while also providing a framework and resources for navigating the process successfully. https://www.aginganddisabilitybusinessinstitute.org/assessment-intro/