

# Building a Strong Foundation for Sustainability

## Handout 3 - Partner Assessment

An annual assessment of the membership and roles of partnership(s) can keep the partnership group focused and ensure that the partnership has the skills and expertise needed to accomplish planned tasks. Organizations may have multiple partnerships for different purposes that can be combined in the assessment process. This strategy will work for planning partnerships and assessing existing partnerships.

An annual partnership assessment should include the following three steps:

**Step 1.** Identify the roles or functions, skills, areas of expertise, and representation needed for a successful partnership.

**Step 2.** Review the partnership membership, the roles members and staff fill, and the skills and expertise members bring to the partnership.

**Step 3.** Compare the “wanted” attributes with the attributes the partnership has.

As you begin to assess the membership or composition of the partnership, the following key questions must be answered first:

### Partnership Membership Assessment Tool

- What is the purpose of the partnership (e.g., state plan development and implementation, advisory group for a specific task or objective)?
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- What does success look like for the partnership? Are there specific activities or objectives for the partnership?
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- What roles do members need to fulfill? What resources or skills do they need to provide to ensure the success of your partnerships? Table A lists roles, skills/expertise and state-level groups that could be represented on the partnership. Use this list as a starting point, and review and customize as needed.
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- What organizations, agencies, and leaders need to be represented to ensure success? What assets are needed?
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## Partner Assessment Tool Details

### STEP 1

After you have considered the key questions, use the list in Table A to brainstorm membership needs with your organization's members, key stakeholders, and partnership leadership. The needs of the partnership will vary depending on the scope and tasks of the partnership. Add these needs to the lists in Table A as they are identified.

On Table A check the "Want" column of the "Roles", "Skills/Expertise" and "Representation" section that corresponds to attributes on your brainstormed list.

Once you have expanded the list, it might be helpful to narrow the list to those most relevant to the success of your partnership. This step will help you prioritize your efforts as you work to recruit new members or further develop or restructure an existing partnership.

### STEP 2

Table B is a tool to help you inventory existing partnership members or those that are considered for membership.

In column 1, list the individuals or groups that are currently partners. In column 2, write the name of the partnership or the intervention on which the partner participates.

For each partner, identify the specific role or task the partner has in the partnership arrangement and/or the expertise or skill the partner brings to the group or the organization represented. Partners may have multiple roles and multiple skills, as well as represent an organization.

Identify the specific contribution the partner brings to the partnership or the specific tasks the partner will accomplish. This may be based on how the partner contributes to the state plan or the state work plan, or a specific function of the partnership. For new partnerships, this will be expected contributions; for existing partnership, this will be based on actual contributions.

This process will identify partners that are carrying much of the workload and help to engage members not actively involved in the partnership.

Go back to Table A. For each partner in Table B, check off each of the roles, skills, expertise, and groups represented in the "Have" column of the "Roles", "Skills/Expertise" and "Representation" sections. Add new elements to the list as needed.

Although Table B is for existing partnerships, it also could be used as an ongoing partnership inventory as you develop a partnership, planning group or committee.

### STEP 3

If your partnership is new, use Table A, to identify partnership roles, member skills and expertise, and represented groups needed for success. With existing partnerships, use Table A to compare what the partnership needs with what it has. For example, compare columns 1 and 2 to assess partnership roles. The partnership has the "needed" role in the rows where both columns are checked. The partnership does not have the "needed" role in the rows where column 1 is checked, but column 2 is not. These rows identify gaps that need to be filled in future recruitment efforts.

## Partnership Membership Assessment Tool

**Table A. Partner Roles, Skills/Expertise and Representation Checklist\* (List of assets required)**

Want/Have		Roles	Want/Have		Skills / Expertise	Want/Have		Possible Sources
		Partnership roles			Data analysis, worksites			State Emergency Services
		Leader			Data analysis, healthcare			Local Hospital Wellness Center
		Committee leader			Reviewer, medical content			Local Hospital Communications
		Task leader			Writer			Cooperative Extension
		Meeting planner			Organizational Planning			Hotel Sales
		Meeting facilitator			Health Equity Expertise			University Healthy Equity Program
		Strategic planner			Consensus Building / Facilitation			Chamber of Commerce
		Communications			Writer /Editor			Library
		Training			Education			School
		Financial support			Fund raising / grant writing			Community Organization
		Technology			Computer Social Media			Colleges
		Budget management			Financial / Investment			Private insurers
		Spokesperson			Ease working with media			Communications Dept.
		Evaluation			Program evaluator			Local college FTE
		Funder			Media communications			Prevention Research Center
		Champion, healthcare			Workplace wellness			Hospital Association
		Champion, public health			Community Health			Local Health Agencies
		Champion, worksites			Community policy change			Business Coalition On Health
		Other _____			Other _____			Other _____
		Other _____			Other _____			Other _____
		Other _____			Other _____			Other _____
		Other _____			Other _____			Other _____

\*Items are examples, not a required or complete list. You can add your own in the blank cells.

## Partnership Membership Assessment Tool

Table B. Partners, Roles, Skills, Expertise and Activities

Partner Name (Name, Title, Organization)	Partnership (purpose, title, or Intervention project)	Role, skill, expertise	Actual or Planned Tasks/Contributions
Example:			
Federally qualified community health clinic	Medical records program	Membership committee chair Project manager, medical records options and requirements	Attend planning meetings Adoption of medical records system
Chamber of Commerce	Workplace Wellness Policy Task Group	Create linkages and promote strategies with businesses	Organize workplace seminars

\*Table adapted with permission from Crump C, Emery J. Competency-based curricula to shape health promotion policy. Prepared for the Directors of Health Promotion and Education and presented at: Centers for Disease Control and Prevention; February 27, 2008; Atlanta, GA.