PARTNERSHIP SELF-ASSESSMENT TOOL

Instructions for Using the Tool Offline

These instructions pertain **specifically** to using the Tool questionnaire as a pen and paper instrument, calculating the results manually, and entering partnership results in the Tool Report. **Before** reading this document, be sure to go over the information in the *Coordinator Guide* and review the *Tool Questionnaire* and the text of the *Tool Report* very carefully (these documents are available at www.partnershiptool.net/psat.html).

Using the questionnaire as a pen and paper instrument

The questionnaire takes about 15 minutes to complete. Questionnaires should be handed out to **every participant (including the coordinator) who is familiar with the way the partnership works**. (See the *Coordinator Guide* for advice about determining which members of your partnership should fill out the questionnaire.) Each participant should fill out the questionnaire **privately and on his or her own time**.

To assure anonymity, participants should be instructed not to share their responses with others, not to write their name or identify themselves anywhere on the questionnaire, and **to return their questionnaire in a manner that does not reveal their identity.** This may be achieved by providing covered boxes or bins at one or more convenient partnership locations so that participants may turn in questionnaires without having to hand them to anyone. For convenience, you may also instruct respondents to submit questionnaires by mail without a return address.

As described in the *Coordinator Guide*, s**et a 30-day deadline for completion of questionnaires that begins the day you receive the first completed questionnaire.** For the results to be valid, **at least 65% of the questionnaires must be completed and returned within that 30-day period.** To aid in achieving this response rate, the coordinator should keep track of this time period, count how many questionnaires have been returned at set intervals, and send out reminder emails and/or post announcements to bolster the response rate.

Calculating the Results

Once 65% of the questionnaires have been returned and the partnership's deadline has elapsed, the coordinator (or coordinator's designee) will calculate the results to insert in the Tool Report through a simple process involving means (averages) for some questions and frequencies (percentages) for others.

The first calculation is the final response rate, which is derived by dividing the number of completed questionnaires that were returned with the 30-day time period by the total number of questionnaires distributed to partnership participants. For example, **if you handed out questionnaires to 20 participants and 15 were returned completed within the allotted time, the response rate is calculated as follows: 15/20 = 0.75 or 75%.**

Questions relating to your partnership's collaborative process (**synergy, leadership effectiveness, efficiency, effectiveness of administration and management, sufficiency of non-financial resources,** and **sufficiency of financial and other capital resources)** will require the calculation of means (or averages). To do this, you will need to assign numerical values to the answer categories for each question, with 1 being the least positive and 5 being the most positive response. Some examples from the questionnaire are as follows:

5. Extremely Well	5. Excellent	5. All of what it needs
4. Very Well	4. Very Good	4. Most of what it needs
3. Somewhat Well	3. Good	3. Some of what it needs
2. Not So Well	2. Fair	2. Almost none of what it needs
1.Not Well at All	1. Poor	1. None of what it needs

Each result for each question is calculated separately by adding up the values selected by respondents and then dividing that number by the number of people who responded. (*Note: All calculations should be rounded to* ***one*** *decimal point.)* If a partnership member did not answer a particular question then this individual is simply not included in the calculation for that item; **anyone who answers "Don't Know" to a question offering that option should also be left out of the calculation for that item**.

For example, let's say five partners completed the questionnaire and answered the Efficiency questions 1-3 as follows:

1. **For the question about use of partners' <u>financial resources</u>:**

    1 respondent answered <u>Very good</u> use (value=4)
    3 respondents answered <u>Good</u> use (value=3)
    1 respondent answered <u>Fair</u> use (value = 2)
    (No one answered excellent or poor use)

    Use of Financial Resources Score = 4+3+3+3+2(total 15) divided by 5 respondents = 3.0

2. **For the question about use of partners' <u>in-kind resources</u>:**

1 respondent answered <u>Excellent</u> use (value=5)
2 respondents answered <u>Very good</u> use (value=4)
1 respondent answered <u>Fair</u> use (value=2)
1 respondent: didn't answer question

Use of In-kind Resources Score: 5+4+4+2(15) divided by 4 respondents = 3.75 (round to 3.8)

3. **For the question about use of partner's <u>time</u>:**

3 respondents answered <u>Good</u> use (value = 3)
1 respondent answered <u>Fair</u> use (value = 2)
1 respondent answered <u>Poor</u> use (value = 1)

Use of Time Score: 3+3+3+2+1(13) divided by 5 respondents = 2.6

To calculate the OVERALL score for a category (e.g., the overall Efficiency score), add the means of all of the question scores under that category and divide that number by the number questions in the category.

Efficiency Score: 3.0+3.8+2.6(9.4) divided by 3 efficiency questions = 3.13 (3.1)

This score would place a partnership in the **Work Zone** for Efficiency (the zones are described below and in the text of the Tool Report itself).

For questions relating to how respondents view the partnership's **decision-making process**, the **benefits and drawbacks** they experience as a result of their participation and their **overall satisfaction** with the partnership, calculate the ***percentage*** of total respondents who gave each answer by dividing the number of people checking a particular response category by the total number of respondents.

For example, let's say five partners who completed the questionnaire responded to the Satisfaction with Partnership Question E (regarding satisfaction with implementing plans) as follows:

0 respondents: Completely Satisfied (0/5 = 0.0 or 0%)
1 respondent: Mostly Satisfied (1/5 = 0.20 or 20%)
2 respondents: Somewhat Satisfied (2/5 = 0.40 or 40%)
2 respondents: A Little Satisfied (2/5 = 0.40 or 40%)
0 respondent: Not at All Satisfied (0/5 = 0.0 or 0%)

Note: Since this questionnaire is being filled out as a pen and paper instrument, it will be possible for respondents to miss/skip questions. Therefore, responses may add up to ***less*** *than 100%.*

Entering your partnership’s results in the Tool Report

Once all of the means and frequencies have been calculated, your partnership’s results may be inserted in the corresponding sections of the report for dissemination to, and discussion by, everyone in your partnership. Everything your partnership needs to interpret the results and begin to take action is contained within the report. This includes a key to the overall category scores as follows:

- 1.0-2.9 Danger Zone: this area needs a lot of improvement
- 3.0-3.9 Work Zone: more effort is needed in this area to maximize the partnership’s collaborative potential
- 4.0-4.5 Headway Zone: your partnership is doing pretty well in this area but has potential to progress even further
- 4.5-5.0 Target Zone: your partnership currently excels in this area and needs to focus attention on maintaining a high score

If you would like assistance in calculating or interpreting your partnership’s results, please send an e-mail to partnershiptool@nyam.org.

PARTNERSHIP SELF-ASSESSMENT TOOL

Coordinator Guide

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Part I: Overview of the Tool

Why is the Tool needed?

Partnerships are very valuable because the collaborative process brings different kinds of people and organizations together, making it possible for them to accomplish much more than they can on their own. Running a successful collaborative process is more easily said than done, however, particularly when a partnership involves participants from very different backgrounds, like professionals, service providers, and community residents directly affected by problems. Because of the tremendous difficulties involved, many partnerships are struggling to make the most of their collaborative potential. Moreover, other than assessing whether or not they achieve their ultimate goal, most partnerships lack a reliable way to determine how well their collaborative process is working or what they can do to make it work better.

The Partnership Self-Assessment Tool was designed to meet these needs. It helps partnerships:

- Understand how collaboration works and what it means to create a successful collaborative process;

- Assess how well the collaborative process is working;
- Identify specific areas they can focus on to make the collaborative process work better.

How was the Tool developed?

A successful collaborative process enables a group of people and organizations to combine their complementary knowledge, skills, and resources so they can accomplish more together than they can on their own. We call this unique combining power **"partnership synergy**." The synergy that a partnership achieves through a successful collaborative process is not just an exchange of resources among participants. Together, the participants create something new and valuable -- a whole that is greater than the sum of its parts. When a collaborative process achieves a high level of synergy, the partnership is able to think in new and better ways about how it can achieve its goals; carry out more comprehensive, integrated interventions; and strengthen its relationship with the broader community. By enabling a partnership to think and act in ways that go beyond the capacities of its individual participants, synergy makes all of the time and effort involved in collaboration worthwhile.

In 2001, the Center conducted the **National Study of Partnership Functioning**. This methodologically rigorous study of 63 partnerships throughout the United States (involving 815 partnership participants) was designed to determine the extent to which partnerships achieve synergy and to identify the factors that influence the ability of partnerships to maximize synergy. The study indicated that partnerships with a high level of synergy have a special kind of *leadership,* which promotes productive interactions among diverse participants, as well as the ability to make good use of their participants' in-kind resources, financial resources, and time (which we call *partnership efficiency*). The study also found high levels of synergy to be related to certain kinds of *administration and management* capacities, which are very different from bureaucratic forms of management, and to the ability of partnerships to obtain *sufficient non-financial resources* from their participants (e.g., their skills, information, connections to people and groups, endorsements, and convening power).

To find out more about the Center's synergy framework and the National Study of Partnership Functioning, please visit www.cacsh.org. You can also request a copy of two papers about this work – "Partnership Synergy: A Practical Framework for Studying and Strengthening the Collaborative Advantage" in *The Milbank Quarterly* 79: 179-206, 2001 and "Making the Most of Collaboration: Exploring the Relationship Between Partnership Synergy and Partnership Functioning" in *Health Education & Behavior* 29: 683-698, 2002 – by contacting us at partnershiptool@nyam.org.

What does the Tool measure?

Building on the instruments and findings of **National Study of Partnership Functioning**, and working closely with people actively involved in partnerships, the Center developed the *Partnership Self-Assessment Tool* to give partnerships an easy way to find out how well their collaborative process is working.

- The Tool measures a **key indicator of a successful collaborative process** -- the partnership's level of ***synergy***.
- The Tool also provides information that helps partnerships **take action to improve the collaborative process**.
    - It identifies the partnership's strengths and weaknesses in areas that are known to be related to synergy -- ***leadership***, ***efficiency***, ***administration and management***, and ***sufficiency of resources***.
    - It also measures partners' perspectives about the partnership's ***decision-making process***, the ***benefits and drawbacks*** they experience as a result of participating in the partnership, and their overall ***satisfaction*** with the partnership.

What can the Tool do for partnerships?

When administered correctly, taking simple steps described in the instructions for using the Tool offline, the Tool provides partnerships with **credible information.** Respondents' answers are **anonymous,** so partners are able to express themselves in ways they might not feel comfortable doing otherwise. The Tool is **methodologically rigorous**, using valid and reliable data from multiple respondents. The data are **analyzed objectively** by applying simple calculations.

Because the report generated by the Tool has substantial legitimacy, partnerships can use the Tool to support a variety of activities, including evaluation and continuous improvement, empowerment of partners, and reporting to funders and the broader community. For example:

- Used at an early stage, before the partnership expects to achieve its ultimate goal, the Tool enables a partnership to determine **how well its collaborative process is working** and to **identify corrective actions** that can help it realize the full potential of collaboration;
- Used repeatedly, the Tool allows a partnership to **track changes over time** and see the impact of its efforts to improve the collaborative process;
- The Tool enables a partnership to get **ongoing, systematic, and honest feedback from its partners.** By giving participants a way to express themselves anonymously about issues they care about, the Tool can help a partnership become **more responsive** to its partners;
- The Tool provides people in a partnership with **a framework for talking about the collaborative process**. This kind of dialogue can broaden partner

involvement in, and strengthen the effectiveness of, partnership **leadership and management**.

II. Guidelines for Using the Tool

Is the Tool right for my partnership?

The *Partnership Self-Assessment Tool* should be used by partnerships that want to:

- See how well their collaborative process is working;
- Learn how to make their collaborative process work better - when they still have time to take corrective action;
- Document the "hidden" strengths of their collaborative process to partners, funders, and the community;
- Make their partnership more responsive to its partners and the broader community;
- Get partners more involved in the leadership and management of the partnership.

The Tool is designed for **internal partnership evaluation**. When it is used internally, by and for the members of a partnership, the Tool is very valuable in supporting partnership growth and learning. **The Tool is *not* intended for use by external partnership evaluators.** If a partnership's members perceive that they are being judged by an external evaluator, and that the partnership's funding is potentially at stake, it is likely that the information gathered through the Tool will be much less accurate and meaningful.

The Tool can be used by a broad array of partnerships. The measures are applicable to partnerships focusing on **any** kind of goal - not only those related to health - and to partnerships that bring together **all** combinations of people and organizations. Nonetheless, the Tool is *not* meant for partnerships at all stages of development or partnerships of all sizes. The Tool is right for your partnership if it:

- Has been in existence **at least six months**;
- Is a group of people and organizations that **continually work together to develop and modify strategies to achieve their goals**;
- Has **begun to take action to implement its plans**;
- Has **at least five active partners**.

The questions in the Tool may be difficult for partners to answer, and the findings may not be reliable, if these conditions are not met.

Who in the partnership should fill out the questionnaire?

Your partnership needs to determine which of its participants should take part in this self-assessment process. To help your partnership make this decision we offer the following guidelines:

(1) The findings in the Report will be most accurate if the questionnaire is completed by ***everyone*** in your partnership who is **familiar with the way the partnership works**. This means that your partnership should try to be **as inclusive as possible** in developing the list of people who will be asked to fill out the questionnaire. Do **not** consider only the people who are on your partnership's board or leadership team. Do **not** exclude active participants who may have problems or concerns about your partnership.

(2) It is important that everyone who is asked to fill out the questionnaire is **knowledgeable enough** about the partnership to do so. The questions in the Tool deal with the way participants in the partnership work together, the effectiveness of the partnership's leadership, the effectiveness of its administration and management, and the sufficiency of the partnership's resources. The results will be more valid if questionnaires are not submitted with answers missing and only a few questions have a "Don't Know" option.

(3) Make sure that the people in your partnership who are asked to fill out the questionnaire are able to do so **within a 30-day time period.** The Tool "Report of Findings" is only valid if **at least 65%** of the people who are asked to take part in the self-assessment process complete the questionnaire within 30 days (the clock begins ticking when the first person in your partnership returns a completed questionnaire). So make sure that the beginning of the self-assessment process does not conflict with holidays or other times when respondents are likely to be too busy to participate.

(4) **Do not exclude people who are very busy since the questionnaire takes only about 15 minutes to complete**. Also, let respondents know that they do not need to complete the questionnaire in one sitting; they can fill out a portion of the questionnaire, return to it later and submit it once it is completed.

(5) To assure the reliability of the data, your partnership will need to ask **at least five people** (the coordinator and at least four other participants) to complete the questionnaire. Remember that one of the criteria for using the Tool is that a partnership has at least five active partners.

If you would like assistance in determining which people in your partnership should fill out the questionnaire, please send an e-mail to partnershiptool@nyam.org.

Managing the Process

To get valid results from the Tool:

- Use the criteria (described above) to make sure that the Tool is right for your partnership and that you are selecting the right people to complete the questionnaire;
- Provide all respondents with basic instructions for completing and returning the questionnaire, using a method that assures anonymity;
- Apply a 30-day time period for completion of questionnaires;
- Count the number questionnaires received at a set interval or intervals (e.g., at the two-week point or weekly) and send out reminder emails and/or post reminder notices to bolster the response rate;
- Cut off accepting completed questionnaires when the 30-day time period expires;
- Calculate the results and create the action-oriented report **only** if your partnership achieves a response rate of **at least 65% within a 30-day time period** (see “Instructions for Using the Partnership Self-Assessment Tool Offline”);
- Distribute the report to everyone in your partnership and discuss the findings together;
- If your partnership **does not** achieve a 65% response rate in the allotted time, discuss the reasons why with everyone in the partnership and try again at a later date.

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