

The [Name of Project] Partnership “Health Check-Up” Tool

A simple, quick qualitative tool to assess the “health” of partnerships

There are many elements that contribute to making a project or program successful. But key to this is having effective partnerships. In our projects, we have learned that all those participating such efforts need to consciously work on our partnership skills and practices. The purpose of the “Partnership Health Check Up” is to encourage early and open communication on the partnership processes within the project, so that any concerns can be identified and addressed appropriately. This qualitative tool known “the Partnership Health Check-list” was developed in 2010 and has been used in many projects. In a concise way it asks each individual from key partner organizations to give their view on key factors that look at how the partnership is working. The tool uses a simple Likert Scale for respondents to score their “satisfaction” level for different processes within the partnership: The scale ranges from 1= disagree strongly to 5= agree strongly. Respondents are encouraged to include written comments as well. All the responses are aggregated by type of organization. Individual names are not collected. Once analysed the results are discussed during a planning meeting so that the partners can agree on actions to be taken to strengthen partnership processes.

The health check-up will be repeated during project implementation on at least an annual basis or more frequently if the partners decide to do so. By using this tool, we expect to see the continual improvement in how the partnership functions.

There are just 20 statements to consider in this checklist. However, for each one there is an optional comment section which affects the numbering system and makes it look like there are more questions—don’t mind this. At the end, there is space to add your own recommendations to improve the functioning of the partnership. We estimate that this will take 20-30 minutes of your time to fill out.

Please indicate your organization:

Please indicate your position in the organization:

1-Senior level 2- Non-senior level

Checklist	Score (1-5) 5= agree strongly, 4=agree, 3=neither agree nor disagree, 2=disagree, 1= disagree strongly	Comments
1. My organization agrees with the common vision for the [NAME OF PROJECT] project.		
2. My organization is clear about its role in the [NAME OF PROJECT] project.		
3. My organization is clear about the role of other partners in the [NAME OF PROJECT] project.		
4. My organization has provided reports on time.		
5. My organization has received information on overall project activities and modalities of implementation for the [NAME OF PROJECT] project		
6. Meetings happen at the appropriate frequency		
7. Meetings are documented appropriately, and minutes circulated		
8. Meetings are followed up by action		
9. Internal project communication among partners is going well (i.e. partners with which the project has a formal agreement).		
10. Communication with external stakeholders is going well (i.e. stakeholders who the project wishes to influence, but where there is no formal agreement).		
11. Project partners in the [NAME OF PROJECT] project are able to resolve any potential conflicts related to project activities.		
12. My organization is willing to learn from experiences and is able to modify the way we do things.		
13. My organization supports my participation in project activities.		
14. I am aware of my responsibilities in this project.		
15. I feel I have enough time to spend on this project.		
16. I feel I have sufficient job tools to implement my duties on this project.		
17. I clearly understand the role of the lead partner in the [NAME OF PROJECT] project		
18. The lead partner of the project is flexible to incorporate the concerns and interests of the other partners		
19. I feel the decision-making process in the [NAME OF PROJECT] project is very transparent and inclusive.		
20. I am pleased with the level of honesty and trust in this partnership.		
Total Score		

21. Please provide your suggestions for improving the “health” of the project partnership:

- a. Suggested actions by my own organization:

- b. Suggested actions by other project partners:

- c. Suggested actions by the project lead organization:

Example of letter to survey respondents:

Dear colleagues and collaborators,

At the [LEAD INSTITUTION], we have long recognized that the key to making a complex project successful is to have effective partnerships and good relationships with community members. Today, we are asking you to help make our partnership in the [NAME OF PROJECT] project better by agreeing to use a simple, quick qualitative tool that we have used in many projects before to assess the “health” of a partnership. This tool is called the “Partnership Health Checkup”.

The purpose of the “Partnership Health Check Up” is to encourage early and open communication on the partnership processes within the project, so that any concerns can be identified and addressed appropriately. In a concise way it asks each individual from key partner organizations to give their view on key factors that look at how the partnership is working. The tool uses a simple Likert Scale for respondents to score their “satisfaction” level for different processes within the partnership: The scale ranges from 1= disagree strongly to 5= agree strongly. Respondents are encouraged to include written comments as well. All the responses are aggregated by type of organization. Individual names are not collected. Once analysed the results are discussed during a planning meeting so that the partners can agree on actions to be taken to strengthen partnership processes.

The health check-up will be repeated during project implementation on at least an annual basis or more frequently if the partners decide to do so. By using this tool, we expect to see the continual improvement in how the partnership functions.

We expect this survey to take you 20-30 minutes to respond to. We would ask you to do this during the next two days, while this email is fresh in your mind, completing it by the end of the day on [DAY OF WEEK; ACTUAL DATE]. Thanks in advance to contributing your energy and thoughts to the [NAME OF PROJECT] effort! Please use the link below: