5.4 BUILDING ORGANISATIONAL CAPABILITY

Fit for Partnering self-assessment

USE IT
To assess how far your organisation is set up to partner well, across six areas, and plan improvements

WHEN
When building organisational capability; repeat to track progress

WHO
Your organisation, ideally colleagues from across it

To partner effectively, organisations need to be "Fit for Partnering". This tool uses the six-area framework from TPI's Fit for Partnering work. Take it online, free, for a profile, priorities and suggested resources: thepartneringinitiative.org/assess/fit-for-partnering/

The Fit for Partnering framework

1. Leadership and strategy
2. Management, systems and processes
3. Staff skills, incentives and support
4. Partnering culture
5. Networks and relationships
6. Internal partnership structuring and management

How to score

Areas 1, 2, 3 and 6: how far is each element in place in your organisation, or the part of it you know best?

0 Not considered · 1 Considered, not yet developed · 2 Partly developed, not implemented · 3 Partly developed, partly implemented · 4 Fully developed, partly implemented · 5 Fully developed, fully implemented

Areas 4 and 5: how far do you agree with each statement?

0 Completely disagree · 1 Strongly disagree · 2 Somewhat disagree · 3 Somewhat agree · 4 Strongly agree · 5 Fully agree

Use **DK** (don't know) or **NR** (not relevant) where needed, and leave them out of any averages. Smaller organisations will often answer NR to parts of area 6.

1. Leadership and strategy

	0	1	2	3	4	5	DK	NR
Vision and rationale: a clear vision and business case for partnering: why we partner, what we aim to achieve and how it contributes to our mission	☐	☐	☐	☐	☐	☐	☐	☐
Leadership commitment: visible commitment from the board and executive leadership, in communications and in the decisions and resources they allocate	☐	☐	☐	☐	☐	☐	☐	☐
Senior leadership responsibility: a named senior leader with the authority to champion partnering, unblock internal barriers and hold us to account	☐	☐	☐	☐	☐	☐	☐	☐
Partnering strategy: priorities for collaboration, the types of partnership to pursue, the main risks and benefits, and the capability needed	☐	☐	☐	☐	☐	☐	☐	☐
Value proposition: a clear understanding of the distinctive resources, expertise, networks, reach and legitimacy we bring as a partner	☐	☐	☐	☐	☐	☐	☐	☐
Resources allocated: dedicated investment in partnering capability, and staff time for building and maintaining relationships	☐	☐	☐	☐	☐	☐	☐	☐
Organisation-wide buy-in: the strategy and leadership priority are understood and accepted across the organisation, not only by senior management	☐	☐	☐	☐	☐	☐	☐	☐
External 'Partnering with us' document: sets out for potential partners what we partner on, why, how and the principles we work by	☐	☐	☐	☐	☐	☐	☐	☐

2. Management, systems and processes

	0	1	2	3	4	5	DK	NR
Partnering policy: agreed partnering principles and organisational approach	☐	☐	☐	☐	☐	☐	☐	☐
Identifying partnerships: a systematic way to identify and prioritise areas for partnership and potential partners, linked to strategic priorities	☐	☐	☐	☐	☐	☐	☐	☐
Assessing potential partnerships: expected value to us and to partners weighed against the costs, including staff time, and the risks	☐	☐	☐	☐	☐	☐	☐	☐
Development and sign-off: a clear process from first approach to sign-off, followed in practice, with proportionate due diligence and approval	☐	☐	☐	☐	☐	☐	☐	☐
Monitoring and review: partnerships regularly reviewed to check they deliver net strategic value, or need adapting or ending	☐	☐	☐	☐	☐	☐	☐	☐
Partnering agreements: templates and guidance suited to partnerships rather than contracts or grants	☐	☐	☐	☐	☐	☐	☐	☐
Enabling legal support: legal support that understands partnering and helps agreements happen smoothly and quickly	☐	☐	☐	☐	☐	☐	☐	☐
Supportive financial systems: for example timely payments to partners, flexible funding and proportionate reporting	☐	☐	☐	☐	☐	☐	☐	☐

3. Staff skills, incentives and support

	0	1	2	3	4	5	DK	NR
Competencies framework: partnering competencies used in job descriptions, recruitment and staff development	☐	☐	☐	☐	☐	☐	☐	☐
Diverse recruitment: staff recruited from diverse sectors and backgrounds, who understand how other sectors work	☐	☐	☐	☐	☐	☐	☐	☐
Partnering objectives and KPIs: partnering incentivised, and time spent on partnerships recognised in workplans and appraisals	☐	☐	☐	☐	☐	☐	☐	☐
Staff partnering competencies: staff who work with partners have the relationship, cross-sector, mindset and technical skills they need	☐	☐	☐	☐	☐	☐	☐	☐
Effective guidance: practical tools, templates, guidance and case studies tailored to our systems	☐	☐	☐	☐	☐	☐	☐	☐
Sharing knowledge and experience: for example case studies, peer learning or a community of practice	☐	☐	☐	☐	☐	☐	☐	☐

4. Partnering culture

	0	1	2	3	4	5	DK	NR
Reaching out: we recognise our limitations and reach out to work with others wherever it would help achieve our goals	☐	☐	☐	☐	☐	☐	☐	☐
Enabling others: we actively enable others to work together towards shared goals	☐	☐	☐	☐	☐	☐	☐	☐
Partnering as equals: we partner on the basis of equity, transparency and mutual benefit, treating partners as equals	☐	☐	☐	☐	☐	☐	☐	☐
Challenging power dynamics: we challenge traditional power dynamics, for example between funders and implementers, and take steps towards equity	☐	☐	☐	☐	☐	☐	☐	☐
Openness: we willingly share information with partners wherever it is relevant	☐	☐	☐	☐	☐	☐	☐	☐
Trust and letting go: we give up control and rely on partners more as trust and confidence grow	☐	☐	☐	☐	☐	☐	☐	☐
Innovation and risk: we encourage creativity and innovation in partnering, and accept that it sometimes means failure	☐	☐	☐	☐	☐	☐	☐	☐
Learning and adapting: we change our own procedures and practices in response to partnering experience and external criticism	☐	☐	☐	☐	☐	☐	☐	☐

5. Networks and relationships

	0	1	2	3	4	5	DK	NR
Diverse, active network: we are a well-connected, trusted part of a diverse, active network of stakeholders across sectors	☐	☐	☐	☐	☐	☐	☐	☐
Investing in networks: we invest in networks and relationships beyond what immediate programming needs	☐	☐	☐	☐	☐	☐	☐	☐
Strong relationships: key stakeholders are willing to engage with us openly about risks and opportunities	☐	☐	☐	☐	☐	☐	☐	☐
Resilient relationships: relationships with key partners are held at several levels and survive when individual staff move on	☐	☐	☐	☐	☐	☐	☐	☐
Listening and improving: we ask partners what it is like to work with us, and act on what we hear	☐	☐	☐	☐	☐	☐	☐	☐

6. Internal partnership structuring and management

	0	1	2	3	4	5	DK	NR
Partnership support function: a specialist unit or named people who advise teams, maintain tools and guidance, and champion partnering	☐	☐	☐	☐	☐	☐	☐	☐
Consistent approach: common partnering principles and processes applied across the organisation, with room for local adaptation	☐	☐	☐	☐	☐	☐	☐	☐
Relationship management system: a shared record of current and potential partners, agreements, contacts, owners and review dates	☐	☐	☐	☐	☐	☐	☐	☐
Joined-up key relationships: a named relationship lead for partners with several links into the organisation, so they experience one organisation	☐	☐	☐	☐	☐	☐	☐	☐
Liaison points for partners: a clear, resourced contact point in each relevant unit or department	☐	☐	☐	☐	☐	☐	☐	☐
Cross-organisation coordination: partnering coordinated across silos, offices, countries and departments, avoiding duplication	☐	☐	☐	☐	☐	☐	☐	☐
Portfolio overview: an overview of the partnership portfolio, reviewed regularly by senior management for fit, value, risk and gaps	☐	☐	☐	☐	☐	☐	☐	☐

From assessment to action

Start with the elements you rated lowest: they are good starting points for discussion with colleagues and leadership. Differences in how colleagues rate the same organisation are worth exploring too. Some example actions:

Area	Example actions
Leadership and strategy	Agree a short statement of why you partner and how it links to your mission. Give a named senior leader responsibility for partnering, including removing internal barriers. Make the costs of partnering, including staff time, explicit in budgets and funding proposals.
Management, systems and processes	Set out the steps from first approach to sign-off, with due diligence and approval proportionate to size and risk. Use partnering agreement templates rather than contract or grant templates. Involve your legal team early and agree turnaround times.
Staff skills, incentives and support	Add partnering competencies to job descriptions, recruitment and development plans. Include partnering objectives in workplans and appraisals. Offer training and coaching, and create regular ways to share experience.
Partnering culture	When planning new work, ask who else is working on the issue. Discuss power openly with partners: who sets priorities, holds the budget and takes decisions. After each partnership review, agree at least one change to your own practice.
Networks and relationships	Map your network across sectors and find the gaps. Set aside time and budget for relationships not tied to a current programme. Build contact at several levels, and ask partners regularly what it is like to work with you.
Internal structuring and management	Give a unit or named person a clear mandate to support partnering. Start with a simple shared register of partnerships, with owners and review dates. Name a relationship lead for each key partner, and review the whole portfolio at senior level at least once a year.

Priority element	Evidence and reflections	Action	Who, by when

Adapted from TPI's Fit for Partnering framework (2026 version, as used in the online self-assessment). © The Partnering Initiative. More tools at thepartneringinitiative.org/resources/type/tool/