1.3 SCOPING AND BUILDING

# Partner assessment form

**USE IT**
To ask systematic questions of a potential partner and check its fit with the goals and needs of the partnership

**WHEN**
Scoping and building, when exploring a relationship with a specific organisation

**WHO**
Your organisation, as a basis for frank discussion with the potential partner

A prompter for anyone creating a partnership. Use it as a starting point for exploring a potential relationship, and as a basis for frank discussions with the key people involved at both senior and operational level.

> The form is designed to raise the right questions, not to provide definitive "screening".

For each question, record the **current status**: what you know so far, how reliable your sources are, and whether you have enough information to base a decision on. Then note the **further actions**: information still needed, remaining concerns, and the timetable and criteria for deciding whether the organisation is a suitable partner.

## Does the prospective partner organisation have…

| Question | Current status | Further actions |
|---|---|---|
| 1. A good track record? | | |
| 2. Reasonable standing and respect within its own sector? | | |
| 3. Reasonable standing and respect from other sectors and key players? | | |
| 4. Wide-ranging, useful contacts it is willing to share? | | |
| 5. Access to relevant information, resources and experience? | | |
| 6. Skills and competencies that complement those of your organisation and other partners? | | |

| Question | Current status | Further actions |
|---|---|---|
| 7. Sound management and governance structures? | | |
| 8. A record of financial stability and reliability? | | |
| 9. A stable staff group? | | |
| 10. Sticking power when things get tough? | | |

## Are its staff…

| Question | Current status | Further actions |
|---|---|---|
| 11. Experienced and reliable in developing projects? | | |
| 12. Successful at mobilising and managing resources? | | |
| 13. Good communicators and team players? | | |

## Notes

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Adapted from The Partnering Toolbook (Tool 1). © The Partnering Initiative. More tools at thepartneringinitiative.org/resources/type/tool/