

# ASSESSING THE VALUE OF A COLLABORATION

## STEP ONE – GATHER INFORMATION

Adopted from: Community Partnership Policy Worksheet: Assessing and Approving Potential Partnerships; Heather Graham Consulting Services.

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**INSTRUCTIONS:** Collaboration requires a significant organizational commitment. Use this tool to gather information about the potential or existing collaboration to help determine if the collaboration will be valuable. This is the first step in an assessment process to determine its value to your organization and potential risks. The three-step process will help prepare staff to participate effectively at collaborative tables in a transparent and productive way.

In consultation with staff from your organization, fill in the following template. You may need to draw on the knowledge of other staff members participating in the collaboration as well as consult with internal experts (e.g. communication, public affairs, legal counsel).

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Collaboration name:

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Completed by (name and position):

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In consultation with:

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Contact information:

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Date:

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1. What was the impetus for initiating the potential collaboration? Was it internally (e.g. by management or the Board) or externally driven (e.g., by a funder, community partner)?

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2. What is the purpose/intent of the collaboration (i.e., what does it endeavour to achieve) and what demonstrated need(s) does it intend to address?

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3. Which of our goals and priorities does it meet?

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4. Who are the prospective partners and what do we know about their missions, goals, culture/values, issues and reputation?

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5. What are the potential benefits of our participation? Here are examples:

- |  |   |
|--|---|
| <input type="radio"/> Deliver services or programs in a new/better way | <input type="radio"/> Makes services and programs more responsive   |
| <input type="radio"/> Improve coordination and quality of service      | <input type="radio"/> Develop skills or capacities                  |
| <input type="radio"/> Create greater impact                            | <input type="radio"/> Generate economies of scale                   |
| <input type="radio"/> Spread risk                                      | <input type="radio"/> Gain knowledge and expertise                  |
| <input type="radio"/> Leverage or attract more resources               | <input type="radio"/> Increase marketing penetration and visibility |
|  | <input type="radio"/> Expand scale                                  |

Other:

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6. What are the barriers that may get in the way of success (think about your organization's internal policies, processes or culture, and the external political, economic and socio-cultural environment)?

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7. What tangible and intangible assets and capacities can we bring to the table (e.g. program delivery mechanism; visibility and access to clients or markets; fundraising and financial capacity; facilities or equipment; respected leaders and spokespeople; communication or distribution systems; organizational and project management expertise)?

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8. What role(s) might our organization play in the collaboration (e.g. share information and/or leading practice; provide program expertise or delivery; offer skills in facilitation, convening, evaluation, research, advocacy, capacity building, resource development, communication/marketing)?

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9. What time, resources and commitments will be available to support our role and the work of the collaboration?

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10. What funding sources are being explored to support the collaboration?  
Are there any conflicts of interest?

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11. Are there any stakeholder expectations that we need to be aware of when discussing our role, the outcomes and/or structure, processes or timelines at the collaboration table? How critical are they?

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## STEP TWO – EVALUATE

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**INSTRUCTIONS:** Complete the following internal evaluation drawing on the information collected in the first step: Gather Information. The evaluation tool can be used as a survey sent to internal staff or as a guideline for a dialogue with colleagues. It should be completed by the team of people within your organization who are vested in the collaboration. After completion of the questions, use the rating system in step three to determine how to proceed.

If you are assessing existing collaborations, then you can also draw on findings from their evaluations (see tools: 6, 7 and 8).

Select one response for each section:

0 = Don't know; 1 = Disagree; 2 = Agree; 3 = Strongly agree

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1. The problem, issue or opportunity that partners want to address requires a collaboration approach.

0  1  2  3

2. There is a fit between our vision, mission, values and goals/priorities and those of prospective/existing partners.

0  1  2  3

3. The collaboration is a good fit with our brand.

0  1  2  3

4. There is an established degree of trust and respect with the potential or existing partners.

0  1  2  3

5. There is a clear audience and demand for the intended outcomes of the collaboration.

0  1  2  3

6. The anticipated/current benefits (e.g., greater impact, leveraging resources, new and better ways to deliver services) our organization receives outweigh the costs (e.g., time, resources).

0  1  2  3

7. The anticipated/current resource requirements (e.g., time, expertise, funds, leadership) are in line with the intended outcomes.

0  1  2  3

8. We have the right person/people from our organization to sit (or sitting) at the collaborative table.

0  1  2  3

9. The other prospective/current partners have the capacity, competencies, and commitment to make the collaboration effective.

0  1  2  3

10. We have enough control over the use of funds, decision-making, staffing and information sharing to satisfy our Board and management team.

0  1  2  3

11. We are confident that we can put enough protection in place to address risks (e.g., financial, ethical, human resource, reputational).

0  1  2  3

12. There is an organizational commitment to participate as an authentic partner in the collaboration. (Refer to Section A: Characteristics of Authentic Collaboration).

0  1  2  3

13. The current environment (e.g., changing demographics, policy, funding) are conducive to the collaboration.

0  1  2  3

14. All indications are that this collaboration is going to be successful.

0  1  2  3

15. This collaboration has the potential to achieve sustainable impacts.

0  1  2  3

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## STEP THREE – CALCULATE THE RESULTS

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**STEPS:**

- 1. Add up the responses from the survey (Step Two)  
(e.g., how many responses were circled as 1, 2, 3 and 'Don't Know').
- 2. Divide the total score by 15 (the number of questions) to get an average for each  
(e.g., 60% were 3; 20% were 2; 10% were 1; and 10% were 'Don't Know').

**Suggested Rating:**

Combine the total percentages for scoring of 3 (strongly agree) and 2 (agree).

If they equal:	Then the collaboration is likely:
100% - 90%	High value and low risk
89% - 80%	Good gamble
69% - 60%	Low value and high risk
Under 59%	Walk away or rethink

**Note:** There may be a high number of 'Don't Know' responses. If so, you may have assessed it too early in its development. You may choose to wait until the collaboration is better defined, and reassess it.

Also, there may be actions that can be taken to address areas of concern or weakness that would give your organization more confidence about its value and risk management.