

Partner Screen Handout

Before embarking on any formal alliance or partnership with another organization, it is helpful to develop a set of criteria that will guide your partnership exploration strategy so you can prioritize your efforts based on your goals and needs.

Clarify your criteria

For example, this screen was created by an organization that regularly partners with others to advance shared goals.

1. Does this partner share our guiding principles?
2. Do this partner's core competencies, knowledge, and skills complement ours?
 - a. What will we gain by working together?
 - b. What will *they* gain by working together?
3. Does the role that we would play with this partner leverage our competitive advantage? In what way(s)?
4. Do we share agreement with the proposed partner on substantive policy goals and desired outcomes?
5. Are the partners' and our organization's proposed roles defined in a way that is clear, measurable and time limited? What is the time horizon for the partnership?
6. Can we find the resources required to work together?
 - a. If additional funds need to be secured, who will take the lead on fundraising?
 - b. How will funds be managed (proposal writing, budget management and reporting)?
7. Will the financial and human resources available for joint work support not only the direct activities but provide for sufficient time to plan, manage, measure and evaluate our joint work?
8. Do the anticipated outcomes of our work together justify the effort required?
 - a. What are the direct benefits to our organization?
 - b. What are the indirect benefits to our organization?
9. How is this partner regarded in the community?
 - a. Are they well respected; if so by whom and for what?
 - b. Are they criticized; if so by whom and for what?
 - c. What are the implications for existing external relationships if we work with this partner?
10. Would this partnership duplicate the efforts of any of our existing partners or partnerships or put us in competition with them?

Apply your criteria to consider different prospects

Once you clarify the criteria that are *most* important to advancing your impact goals, you can use a chart to guide conversation comparing a range of prospects. The sample chart was developed by an organization

seeking to identify potential partners for an administrative consolidation, or programmatic collaboration. The chart was used to guide a conversation comparing a range of prospects.

Rank on a scale of 1 to 4 to indicate how well the prospect satisfies the established criteria, with 1=insufficient, 2=sufficient, 3=strong, 4=outstanding

Prospect Organizations

Sample Criteria					
	Org 1	Org 2	Org 3	Org 4	Org 5
Mission statement is similar					
Organizational values are similar					
Staff skills are complementary					
Has capable CFO					
Diversifies the funding model					
Opens opportunity to expand policy work					
Respected by our key stakeholders					
Have successfully worked together in the past					
Has strong development function					
Can use our approach to DME (design, measurement, and evaluation)					
Score					

Worksheet

Choose your guideposts and recognize tensions and trade-offs with different criteria in Sample 1. Which criteria would you want to include?

What criteria, or screening questions, would you include and prioritize?

1.
2.
3.
4.
5.
6.
7.
8.

How will you apply this screen in your explorations?

Prospect Organizations

Criteria					
	Org 1	Org 2	Org 3	Org 4	Org 5