



Assess your Collaboration

Advocacy & Communication Solutions, LLC (ACS) developed this tool to help collaborative efforts reflect on their progress, no matter what stage they are in: during planning, throughout implementation, or as your collaborative effort is winding down to completion. Use this tool to:

- Better understand the components of successful collaboration during planning;
- Help to continuously improve or correct your course of action during implementation; or
- Reflect on lessons learned at the conclusion of a collaborative effort.

ACS identifies six components of a strong and effective collaborative. They are:

1. **Purpose and Goals**—Have an explicitly stated purpose and goals to drive all activities of the collaborative.
2. **Capacity and Leadership**—Assess the capacity of staff, partners or others to implement activities. Have strong leadership to keep the collaborative on track to achieve goals.
3. **Partners and Expectation**—Partners or participants in the collaboration must understand the expectations of themselves and others involved.
4. **Communication**—Have explicit internal communication with partners and external stakeholders.
5. **Understanding the Environment**—Collect and use information about assets, barriers or challenges to achieving the goals.
6. **Tracking Progress**—This tool provides the framework to assess where you are and where to improve in your collaborative efforts. Either an individual or a group may assess the collaboration components.

This tool provides the framework to assess where you are and where you may need to improve in your collaborative efforts. Either an individual or a group may assess the collaboration components. After you score the collaborative, space is provided to reflect on how to improve collaborative scores.

¹Confused about the language around collaboration? We created a glossary of collaboration terms to help cut through the jargon and get everyone on the same page. Find it on our [website](#) or [click here](#) to download.

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For more information about ACS, please contact us at info@advocacyandcommunication.org. Follow us on [LinkedIn](#) and [Medium](#).

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Collaborative efforts can take many forms. They can be local, regional or statewide, or span the nation. They can be called an alliance, a coalition or a partnership. They can include like-organizations or organizations from different sectors. They can include public, private or philanthropic organizations. Regardless of the size or make-up of your effort, Advocacy & Communication Solutions, LLC (ACS) has the experience to help you get from point A to point B. Visit our website at www.advocacyandcommunication.org.

Directions: Fill out descriptive information about the collaborative on this page. Then individually go through each table to rank the statements on a scale of 0-3. After reflecting on each section, use the space provided to describe actions participants can take to improve the scores. Although it may not be realistic to score 3's in every category, ACS recommends thinking through how a group may continuously improve in collaboration. This can be done at any point of the collaboration's life cycle. For example:

- When planning collaboration, understand your baseline scores and learn where you can improve.
- During implementation, continuously improve and/or identify areas for course correction.
- At the completion of a collaborative effort, identify next steps to communicate achievements to others.

Use this tool as an individual or in a group exercise. If you intend to use this tool to reflect on progress as a group exercise, ACS recommends using a third-party facilitator to compare individual answers, to consider how the collaborative may improve in each area, and to bring the group to next steps. If you cannot get a facilitator, have a clear goal for the facilitated conversation (identify next steps for improving the collaboration), and designate one person to take notes and one person to push for tasks and assignments.

OVERARCHING QUESTIONS

1. What do you call the collaboration in which you are involved? _____

2. What is its purpose? _____

3. Who is involved (include key partner organizations or individuals that make decisions about the collaboration)? If you would like to map your entire network of stakeholders, use [ACS' network mapping tool](#).

1. PURPOSE AND GOALS	Not at all 0	More attention needed 1	Good 2	Excellent 3
Clarity of purpose: All key partners understand why the effort is taking place.				
Clear goals: All partners share in mutually agreed-upon goals that support the purpose.				
Work plan: There is a written work plan, including strategies and tasks, which drive activities to achieve explicit goals.				
Accountability: In the work plan, partners are assigned tasks, and due dates are attached to each tasks.				
Understanding of broader impacts: Partners and participants understand the broader impact of their work on a sector, community or industry.				
TOTAL SCORE				

How will the collaborative improve on having clear purpose and goals?

2. CAPACITY AND LEADERSHIP	Not at all 0	More attention needed 1	Good 2	Excellent 3
Dedicated Time: There is dedicated time for the collaboration to explore new and different approaches, use research-based decision-making, and to discuss and overcome barriers.				
Core Leadership: A smaller core leadership team within the larger group is empowered to make decisions. Explicitly defined leadership for a larger group drives overall planning and strategy, and is able to make decisions.				
Groundwork before meetings: For early stage collaborations convening external partners, leadership has briefed stakeholders inside and outside of the effort in advance of convening partners. For collaborations in the implementation stage, leadership is prepared before each meeting, whether with internal or external partners.				
Capacity for coordination, staffing and management: Resources are dedicated to coordination of the effort, scheduling of meetings and follow up, conducting and locating necessary research and documents, and overall project management.				
Point of contact: There is a clear point of contact for the collaborative. (There may be a few contacts for different purposes such as funding, media relations or signing people up for activities, but they should have the same information and be able to speak on behalf of the collaborative.)				
TOTAL SCORE				

How will the collaborative improve capacity and leadership?

3. PARTNERS AND EXPECTATIONS	Not at all 0	More attention needed 1	Good 2	Excellent 3
Understanding of expectations: Partners understand the scope of the effort and their expected time commitment.				
Diversity: Partners at the table represent the diversity that is reflected in the both the organizations involved and the population impacted by the work.				
Respect: Partners recognize and respect each other's area of expertise and are willing to compromise on objectives and process with respect to the larger purpose and goals.				
Right people and/or organizations at the table: The partners engaged in the effort adequately represent the field and have the appropriate decision-making ability within their organizations to fully commit to the effort.				
Identifying competing and mutual self-interests: Leadership works to identify each partner's role in the effort, forecast mutual interests and anticipate competing interests.				
Flexibility and openness to risk: Partners understand and have the ability to adapt to evolving needs of the collaborative, and openly discuss risks.				
Explicit roles and complementary functions: There is an explicitly defined division of labor among partners, including how different roles complement each other.				
Individual Commitment: Partners have expressed their commitment to the effort				
Strategy for engaging others in the work: There is a plan with goals, strategies and tactics for building supporters, advocates or champions, messengers, and/or volunteers.				
Clear expectations of meetings: There is a written agenda sent in advance of all meetings that outline the purpose of the meeting overall and each agenda item.				
TOTAL SCORE				

How will the collaborative improve partner commitment and expectations?

How will the collaborative improve partner commitment and expectations? *(continued)*

4. COMMUNICATION	Not at all 0	More attention needed 1	Good 2	Excellent 3
Internal communication: There is continual information flow among members or partners that ensures transparency and keeps everyone on the same page.				
Targeted communication: The communication has target audiences and ways to reach those audiences.				
Shared narrative and messaging: There is a shared communication strategy that defines the messaging and the messenger/s or voice for the effort				
Communication is a priority: From the onset, communication is a priority in the effort.				
TOTAL SCORE				

How will the collaborative improve communication?

5. UNDERSTANDING THE ENVIRONMENT	Not at all 0	More attention needed 1	Good 2	Excellent 3
Data and information: The collaborative regularly collects data and information about the issue and individuals it affects (young children, families, workers, businesses, etc.).				
Setting a baseline: Partners identify baseline information about the environment to measure progress of the collaborative.				
Understanding the field: Partners identify who the organizations or individuals are that work on the same issues, including allies or challengers for the collaborative. There is a list that is regularly updated.				
TOTAL SCORE				

How will the collaborative improve understanding about its environment?

6. TRACKING PROGRESS	Not at all 0	More attention needed 1	Good 2	Excellent 3
Benchmarks and Milestones: Partners agree on benchmarks of success based on the work plan.				
Tracking progress: There is a system in place, including indicators, that tracks the progress of the collaborative toward shared goals. Indicators are signs or measures that show the condition or existence of something. For example, an indicator of on-time graduation is a decrease in school days missed.				
Shared outcomes: Partners communicate and share outcomes of the collaborative.				
Continuous improvement: Partners evaluate progress and assess or plan for next steps in an ongoing way (e.g., annually, every six months, quarterly, etc.).				
TOTAL SCORE				

How will the collaborative improve tracking progress?

Score Sheet

Add up the number of times you marked 0–3 in each category. Then, add up the total score for each category. Use your scores to compare categories. For example, if you score mostly 2’s and 3’s scores in purpose and goal and 0’s and 1’s in communication, think about what you can do to bolster communication.

CATEGORY	TOTAL 0's	TOTAL 1's	TOTAL 2's	TOTAL 3's	TOTAL SCORE	What your total score means
Purpose and Goals						Needs work: 0–5 Good: 5–12 Excellent: 13–18
Capacity and Leadership						Needs work: 0–5 Good: 5–11 Excellent: 12–15
Partners and Expectations						Needs work: 0–10 Good: 11–24 Excellent: 25–30
Communication						Needs work: 0–4 Good: 5–8 Excellent: 9–12
Understanding the Environment						Needs work: 0–3 Good: 4–7 Excellent: 8–9
Tracking Progress						Needs work: 0–4 Good: 5–8 Excellent: 9–12
TOTAL SCORE						Needs work: 0–50 Good: 51–70 Excellent: 71–93

For additional tools and resources find us on the web at www.advocacyandcommunication.org.

