Instructions for using Partner Assessment Matrix

The attached is an Excel workbook with 3 separate spreadsheets. I still think it's a big scary looking monster but that's due to trying to capture measures that would make sense to people AND fit our organizational style. Please modify and tweak as needed to fit your organization's needs.

A bit of description:

Each spreadsheet has a slightly different in focus however the formatting is pretty consistent

- In each, the top section defines what would qualify for a rating of 0 (low support) to 5 (high support). The lower section is space to enter that rating and a total "score" per partner or initiative.

- If you scroll to the far right side, you'll see scoring and assessment comments. Honestly, as this tool is new, we are probably overly generous with what "earns" its keep. This will be tweaked but for now we're not worrying over it much as our primary interest is the conversation about the pros and cons of pursuing, maintaining, changing, or dropping a partnership.

HPLD Assess-Aligned Affiliation

This sheet is about assessing whether a large initiatives are worth pursuing.

The example is whether we should join the Colorado Unite Us program which allows organizations to refer clients within an area. We are intrigued by the possibility but know that the system only works if it's widely adopted by other agencies in our area – something that is **not** captured in this chart. So, if we hit a tipping point of a majority of service agencies that are partners joining this system, it looks like something that we could seriously consider pursuing.

HPLD Assess-Time vs Value

This sheet is the one that our Managers are using the most as it's looking at partnership/service opportunities based on a number of consideration points.

- Columns B & C are two ways to look at assessing the cost of using resources for the effort. Column B is a bit less concrete (my style of thinking) while Column C attempts to quantify levels more specifically.

The example is whether partnering with the Carbon Valley Network – a system of organizations, businesses, and government entities is something to continue. As you might assume, the answer is "of course it's earning its keep." However, as our priorities evolve or if the Network membership changes radically, we might find ourselves with a new result.

Partner Assess-HPLD's Value

We know we want partners to have a chance to evaluate HPLD. As you notice, there are no samples. Honestly, we are pursuing a different route…and are asking Partners to write a letter of support that we can use for grant efforts and possible promotion. Just their willingness to put in writing that they value our work is a huge "thumbs up." That being said, I might try to create a survey just to see how it goes.