

Collaborative Self-Assessment Survey

Often, collaborations get off to a great start with an infusion of resources and then lose impetus as projects come and go. Successful collaborations/partnerships have the willingness and ability to assess their organizational functioning, the implementation of strategies, projects or activities and progress towards reaching goals and outcomes.

GUIDELINES FOR USING THE SURVEY:

- 1. There are a variety of ways to use this survey. Some ideas include:** Collaborative members can complete the survey separately, submit the surveys to someone who will tally the results and then come together to discuss results and plan action steps. Alternatively, members can complete the survey while together at a meeting and discuss results and plans immediately. Surveys can be completed anonymously or not. However, keep in mind that the purpose is to generate discussion, not simply a numerical result. Use of web-based tools such as Zoomerang or Survey Monkey can be efficient ways to distribute and compile survey results.
- 2. Once members have completed the survey, the group can determine what areas were most often marked “successful” or “partially successful.”** These are areas in which your collaborative is well functioning and strong. How can your group maximize these strengths?
- 3. Now, determine which questions were most often marked “challenging” or “very challenging.”** These are areas that require action. What will you do to improve collaborative functioning in these areas? Who is willing to take the lead?
- 4. Once someone has agreed to take the lead,** incorporate these actions into your work plans. Remember to include a way to check-in on progress.

Collaborative Self-Assessment Survey

PLEASE RATE THE FOLLOWING QUESTIONS IN EACH AREA USING THE SCALE BELOW:

I. Shared Vision

1 = Successful 2 = Partially Successful 3 = Challenging 4 = Very Challenging

- | | | | | |
|---|---|---|---|---|
| 1. Our group revisits our vision periodically and revises when needed. | 1 | 2 | 3 | 4 |
| 2. Our vision is the starting point for setting goals, developing strategies, and creating change in our community. | 1 | 2 | 3 | 4 |
| 3. Our vision represents input from a broad range of people in the community. | 1 | 2 | 3 | 4 |
| 4. Members can see where their personal vision fits in the shared vision. | 1 | 2 | 3 | 4 |

II. Inclusivity & Participation

1 = Successful 2 = Partially Successful 3 = Challenging 4 = Very Challenging

- | | | | | |
|--|---|---|---|---|
| 1. Membership is open – that is, anyone can join. | 1 | 2 | 3 | 4 |
| 2. Our members represent a wide range of people and groups (e.g., parents, faith, business, local associations, etc.) | 1 | 2 | 3 | 4 |
| 3. Our group works with a broad range of community groups (outside of the partnership itself). | 1 | 2 | 3 | 4 |
| 4. Meetings and materials are presented in languages that are accessible to partnership members and community residents. | 1 | 2 | 3 | 4 |
| 5. The membership of the group reflects the ethnic, racial, socioeconomic and age diversity of our community. | 1 | 2 | 3 | 4 |
| 6. Our membership includes a balance of community members and agency representatives. | 1 | 2 | 3 | 4 |
| 7. Members share responsibility and workload so that the work of the collaborative is accomplished. | 1 | 2 | 3 | 4 |

Collaborative Self-Assessment Survey

III. Sound Decision Making

1 = Successful 2 = Partially Successful 3 = Challenging 4 = Very Challenging

1. Our collaborative has an agreed upon decision-making process that is spelled out in writing and is understood by all members.	1	2	3	4
2. Members have an opportunity to participate in decision-making.	1	2	3	4
3. We are able to resolve conflict in order to reach decisions.	1	2	3	4
4. Decision-making power is shared and not concentrated in the hands of a few.	1	2	3	4
5. Our group collects information and data and uses it to make informed decisions.	1	2	3	4

IV. Facilitative Leadership

1 = Successful 2 = Partially Successful 3 = Challenging 4 = Very Challenging

1. Leadership is shared among members.	1	2	3	4
2. New members of the group have the opportunity to take leadership roles.	1	2	3	4
3. The group provides leadership within the broader community on issues of interest to the collaborative.	1	2	3	4
4. The ideas of all members are heard and respected.	1	2	3	4
5. We build in time to have fun and celebrate success.	1	2	3	4
6. Capacities and skills of members are recognized and used.	1	2	3	4

Collaborative Self-Assessment Survey

V. Effective Communication

1 = Successful 2 = Partially Successful 3 = Challenging 4 = Very Challenging

1. Information about collaborative activities and decision-making is freely shared and easily accessible – there is not a lot of “insider” information.	1	2	3	4
2. Our collaborative has a communication plan that fosters communication among members and the larger community (e.g., meetings, community events).	1	2	3	4
3. Our group has a plan or process in place for managing conflict.	1	2	3	4
4. Information about upcoming events and activities received via e-mail, fax or post is communicated to all collaborative members.	1	2	3	4
5. Activities and communications are done in language that everyone can understand (e.g., no jargon, multilingual).	1	2	3	4
6. The results of our work are shared with the larger community.	1	2	3	4
7. Our collaborative has a visible presence and identity in the community.	1	2	3	4

Collaborative Self-Assessment Survey

VI. Sustainability

1 = Successful 2 = Partially Successful 3 = Challenging 4 = Very Challenging

1. The collaborative periodically evaluates its efforts and identifies activities members want to sustain or revise.	1	2	3	4
2. The collaborative has developed public will and a constituency around issues of interest.	1	2	3	4
3. The group has built its capacity – and that of its constituencies – to understand how policy is made and influenced.	1	2	3	4
4. Members have formed relationships to gain support of local institutions and formal policy bodies.	1	2	3	4
5. The collaborative has implemented policy and systems change strategies.	1	2	3	4
6. Successful activities and programs initiated by the collaborative are incorporated into the ongoing work of local institutions and/or community groups.	1	2	3	4
7. The collaborative has a plan for sustainability.	1	2	3	4
8. The collaborative has a fund development plan to sustain both core functioning and successful strategies of the partnership.	1	2	3	4