



Finding Your Perfect 10:
10 Steps to Finding a Strategic Partner for Your Organization
Part 1 Worksheets



Selecting Our Core Team Worksheet

Potential Core Team Members	Role in the organization	Able & willing to prioritize this work	Influence within the organization	Expertise and/or Information we need	Unique stake in the organization	Score
Board Pres	<i>Give each potential core team member a score of 1 (low) to 5 (high)</i>					<i>Add it up!</i>
CEO/ED						



Creating Our Organization's Metrics Worksheet

Our #1 metric is MISSION alignment. In addition, our Core Team has identified our organization's top "Assets, Wows & Needs." Is there anything else we should be looking for in a partner?

Our Top Needs	Our Top Assets & Wows

BRAINSTORMING PROMPT: *What else should our organization be looking for in a partner?*

1. List the qualities, characteristics and/or resources you think our organization should be looking for in a partner (ex. trustworthiness, proven track record of collaborating, readiness to consider a closer relationship).

2. Now, circle the 3 most important qualities, characteristics and/or resources you listed above.

Identifying Potential Partners Worksheet

Our Core Team has identified our organization's top "Assets, Wows & Needs." We are looking for collaborators and partners who meet our needs and who need what we have.

Our Top Needs	Our Top Assets & Wows

BRAINSTORMING PROMPTS: Do not think about "who would be a good partner?" or "who is likely to partner with us?" Just answer the questions, listing any and all organizations you can think of – even those you think are unlikely to become partners. • Go ahead and list the same organizations more than once, if applicable. • If you don't know the answer to a question, just skip it. Answer the ones you can. • Make notes next to the name of each organization you list, so that you can remember why you listed it.

Where do you see "Wows!" happening in our sector?

Which organizations out there need what we have?

Which organizations out there have assets that we need?

Who else out there does what we do...or something similar?

Who are the "frenemies" of our organization (those working the same territory and/or applying for the same funding)?

Who are our organization's closest partners (those with whom we share programming, funding, staff, etc.)?

Which organizations supply resources, clients, information, etc. so that our organization can do the work we do?

Which organizations depend on us for resources, clients, information, results so they can do the work they do?

Drafting Interview Questions Worksheet

The Interview is a preliminary conversation. You're not making any commitments to the organizations you interview. This is still part of an exploratory phase. During the interview, you'll want to ask your potential partner three main types of questions: 1) Broad, open-ended questions that allow your interviewee to describe their own assets, wows & needs, 2) Metric-specific questions focusing on your organization's needs and 3) Imagination-focused questions. In addition, you'll want to ask one final, critical question – the answer to which will help determine which organization you select for a more serious conversation.

1. Recommended open-ended questions

- Why does your organization exist?
- What are you working on right now that you're most excited about?
- Who are your most important partners and collaborators currently?
- What do you think your organization does best?
- What are you planning for the future that you're most excited about?
- What do you think your organization's biggest needs, challenges and frustrations are?

2. Metric-specific questions

Our Top Needs	Questions We Want To Ask

3. Recommended imagination-focused questions

- Where do you see your work and our work intersecting?
- How can you imagine us working together more closely?

One Final, Critical Question

- How interested are you in having a more serious conversation about working together more closely?

Creating Rubrics Worksheet

A rubric describes what you are looking for in advance and allows you to assess each interviewee fairly and efficiently. Creating rubrics for each interview question gives you a chance to think in advance about what a “good” answer would be. Good rubrics are concrete, indicate the degree to which expectations are met and use parallel language across the scale. We recommend using a scale of 1 (lowest) to 3 (highest). It’s easiest to start by building the “3” – the best answer – to each question, and then going down from there. We’ve given you samples for our recommended questions, but only you can decide what a best answer to each of your questions sounds like. Feel free to create your own! And, of course, you will need to write your own rubrics for your organization-specific questions.

# of points	Why does your organization exist?	What are you working on right now that you’re most excited about?	Who are your most important partners and collaborators currently?	What are the things you think your organization does best?	What are you planning for the future that you’re most excited about?	What do you think your organization’s biggest needs, challenges and frustrations are?
3	Very clearly articulated with a sense of importance, aligns in some way with our mission	Very innovative, clear, purposeful, aligns in some way with our work	Many partners and/or very meaningful partners - may have been through strategic restructuring with other orgs	A robust list of assets that line up, in a direct way, with our needs	Very innovative, clear, purposeful, aligns in some way with our work	A list of needs that line up, in a direct way, with our assets & wows
2	Somewhat known, clear, sense of importance, alignment	Somewhat innovative, clear, purposeful, alignment	Some partners and/or somewhat meaningful partnerships	A good list of assets that line up somewhat with our needs	Somewhat innovative, clear, purposeful, alignment	A list of needs that line up, somewhere, with our assets & wows
1	Unknown, unclear, unimportant	Lacks innovation, clarity, purpose	Few partners and/or shallow partnerships	A shallow list of assets and/or a list that doesn’t really line up with our needs	Lack innovation, clarity, purpose	A list of needs that doesn’t really line up with our assets or wows

Add your metric-specific questions here and create your own rubric for each one:

# of points						
3						
2						
1						

# of points	Where do you see our work intersecting?	How can you imagine us working together?	How interested are you in a more serious conversation?
3	Very clear and interested, may already be happening	Very clear and interested, may already be happening	Very clear and interested, may already be happening
2	Somewhat known, clear and interested	Somewhat known, clear and interested	Somewhat known, clear and interested
1	Unknown, unclear and/or disinterested	Unknown, unclear and/or disinterested	Unknown, unclear and/or disinterested

Interview Scoring Worksheet

Instructions:

Use your rubric to give each organization a score of 1 (lowest) to 3 (highest) for each question you asked during the interview.

Add up the points for each organization.

Then divide by the total number of points available to get the final % grade for each organization. The higher the number, the better the match.

You will create a scatter plot using 1) the final % grade on one axis and 2) the “Interested in further convo” score on the other. This will help you visualize THE organization you’d like to take the next step...and possibly go the distance...with.

Name of interviewed organization	Why does your organization exist?	Working on right now that you're most excited about	Most important partners and collaborators	Things the organization does best	Planning for the future	Organization's biggest needs, challenges and frustrations	Your org specific questions						Sees intersections	Imagine working together	Interested in further convo	# of points	Total points possible	Grade
SAMPLE ORG	3	2	2	3	3	1	2	2	3	1	2	3	2	3	32	42	76%	