



Collaboration Readiness Assessment

Considering a collaboration with a peer organization? Use this tool internally or with your prospective partner to assess your readiness for a meaningful, systems-aligned collaboration.

Score each item from 1 (Not at all true) to 5 (Very true).

Mission & Strategic Alignment	Score	Notes
Our mission and long-term goals align with the potential partner's direction		
The collaboration directly supports our strategic plan or priority initiatives		
We have clarity on the shared problem we aim to address together		
We understand how collaboration strengthens our impact compared to acting alone		
We can articulate the value we bring to the partnership		

Organizational Capacity & Infrastructure	Score	Notes
We have staff capacity to meaningfully participate in planning and implementation		
Our internal systems (finance, HR, data, communications) can support a partnership		
We have clear roles and responsibilities internally for collaboration work		
We can meet reporting, compliance, and grant requirements in a shared project		
We have the ability to adapt workflows to align with a partner organization		

Culture, Trust & Communication	Score	Notes
We have staff capacity to meaningfully participate in planning and implementation		
Our internal systems (finance, HR, data, communications) can support a partnership		
We have clear roles and responsibilities internally for collaboration work		
We can meet reporting, compliance, and grant requirements in a shared project		
We have the ability to adapt workflows to align with a partner organization		

Equity & Community-Centered Practice	Score	Notes
We prioritize community voice and lived experience in program design		
We are aligned with the partner on equity values and commitments		
We understand how power dynamics may show up in the partnership		
We are prepared to share resources equitably, not equally		
We have processes to ensure the collaboration benefits the communities most impacted		

Governance & Decision-Making	Score	Notes
We are clear on how decisions will be made (consensus, majority, delegated authority)		
We can commit to shared timelines, milestones, and accountability structures		
We are comfortable with shared risk and shared responsibility		
We have clarity on legal, fiscal, and compliance implications		
We can designate a point person or team to manage the partnership		

Financial Readiness	Score	Notes
We understand the financial implications of the collaboration		
We can contribute resources (funding, staff time, space, expertise)		
We have clarity on how funds will be managed and distributed		
We are prepared for joint program budgeting and financial reporting		
We have discussed sustainability beyond the initial grant or project period		

Data, Evaluation & Shared Measurement	Score	Notes
We have compatible data systems or can align them		
We agree on shared outcomes and indicators of success		
We can collect and share data ethically and securely		
We have capacity for joint evaluation or learning activities		
We are aligned on how results will be communicated to stakeholders		

Collaboration Mindset & Systems Thinking	Score	Notes
We understand how our organizations fit within the broader ecosystem		
We are willing to shift from competition to collective impact		
We can identify upstream root causes, not just program outputs		
We are open to adaptive strategy and iterative learning		
We see collaboration as a long-term investment, not a short-term tactic		

Score:

Scoring is intentionally flexible – the goal is reflection, not a pass/fail.

- **160-200: Strong readiness.** Collaboration is likely to be successful with clear planning.
- **120-159: Moderate readiness.** Address gaps before formalizing the partnership.
- **80-119: Foundational readiness.** Consider capacity-building or a smaller pilot first.
- **Below 80: Collaboration may not be advisable at this time.**

