



# Partner Vetting Rubric

Considering a collaboration with a peer organization? Use this rubric to evaluate the suitability, reliability and alignment of a potential collaboration partner. Rate each criterion from from 1 (Significant concerns) to 5 (Strongly meets expectations). Add notes to capture nuance, context, or follow up questions.

Mission & Strategic Alignment	Score	Notes
Their mission aligns with our core purpose		
Their strategic priorities complement our goals		
They demonstrate a clear understanding of the shared problem		
Their involvement strengthens collective impact		
They articulate a compelling value-add to the partnership		

Organizational Capacity & Infrastructure	Score	Notes
They have adequate staffing and leadership bandwidth		
Their operational systems are strong and dependable		
They have a track record of delivering on commitments		
They demonstrate strong project management capability		
They can meet compliance, reporting, and grant requirements		

Culture, Trust & Communication	Score	Notes
Their organizational culture supports transparency and accountability		
They communicate clearly, consistently, and respectfully		
They handle conflict constructively and collaboratively		
They are willing to share power, credit, and decision-making		
They have a positive reputation with stakeholders and community members		

Equity & Community-Centered Practice	Score	Notes
They demonstrate a genuine commitment to equity and inclusion		
They meaningfully engage community voice in decision-making		
They understand and address power dynamics in partnerships		
They support equitable—not equal—resource distribution		
Their work benefits the communities most impacted		

Governance & Decision-Making	Score	Notes
They have clear internal governance and decision processes		
They follow through on timelines and shared milestones		
They are comfortable with shared risk and responsibility		
They understand legal and fiscal implications of collaboration		
They can designate a reliable point person or team		

Financial Readiness	Score	Notes
Their financial position is stable and well-managed		
They can contribute meaningful resources to the partnership		
They have transparent budgeting and financial reporting practices		
They can manage shared or pass-through funds responsibly		
They consider long-term sustainability beyond initial funding		

Data, Evaluation & Shared Measurement	Score	Notes
Their data systems are compatible or adaptable		
They agree on shared outcomes and indicators		
They can collect and share data ethically and securely		
They participate in joint evaluation and learning		
They commit to transparent communication of results		

Collaboration Mindset & Systems Thinking	Score	Notes
They understand their role within the broader ecosystem		
They embrace collective impact over competition		
They think in terms of root causes, not just outputs		
They are open to adaptive strategy and iteration		
They view collaboration as a long-term investment		

**Score:**\_\_\_\_\_.

**Highest Scoring Area:**

**Lowest Scoring Area:**

#### Decision Guidance

- **160–200: Strong partner; high potential for successful collaboration.**
- **120–159: Promising partner; address gaps before formalizing.**
- **80–119: Moderate concerns; consider a limited pilot or capacity-building first.**
- **Below 80: Partnership may not be advisable at this time.**