OHA Partnership Toolkit:

Building Partnerships for Policy, Systems and Environmental Change

TOOL 1: Leading Change Self-Assessment

The following explores your practice leading change. This assessment tool is meant to be completed on your own. Once completed, review your answers to see what areas you would like to strengthen in yourself. For each area you would like to improve on, consider listing key steps or specific ways you will work to develop over the next year or so. Feel free to enlist a coach (peer, supervisor, colleague, etc.) who can help you in improving your practice for leading change.

Complete this self-assessment on a yearly basis to see how you have developed and areas where you might need to readjust to grow further.

Please rate the level of accuracy of the statements below as they reflect your point of view:		
1 = Area of development for me	**2 = In my repertoire**	**3 = A key strength of mine**

Rating	Statement
	A high level of commitment to making positive and lasting change in the health system
	Collaborating with peers
	Articulating a vision for the future
	Inspiring others
	Empathy; genuine interest in others' concerns
	Willingness to accept feedback
	Excellent relationships with peers in other parts of the health system
	Curiosity and openness to new approaches
	Approaching and addressing conflict constructively
	Seeing myself as a steward, a leader with responsibility in a system or policy change process
	Having a long time-horizon for my aspirations
	Analytical thinking about the system or policy change process
	Confidence in my ability to make a difference

Please rate the level of accuracy of the statements below as they reflect your point of view:		
1 = Area of development for me	**2 = In my repertoire**	**3 = A key strength of mine**

Rating	Statement
	Willingness to abide by collective decisions even when I have doubts
	Identifying and communicating a shared story between myself and different key audiences
	Describing the value of the public health system
	Building relationships that lead to commitments
	Creating a strategic leadership structure
	Being creative about turning the resources I have into what I need
	Taking effective action
	Formulating plans/vision
	Gathering relevant information
	Following through on my commitments
	Making sure to follow through on my commitments
	Communicating effectively
	Implementing change initiatives

My Key Steps to Improve on

TOOL 2: Understanding Your Partnerships

"I am organizing (WHO - partnerships) to do (WHAT - measurable aim) by (HOW - tactics) because (WHY - motivating vision) by (WHEN - timeline)."

Instructions:

1) **Brainstorm Partnerships:** Brainstorm and list your partners (individual, group, or organization on the following page). To the extent possible, list partners by their first and last names. For organizations, list the names of strategic employees to target. If you don't know anyone by name, list whom to ask to find out.

2) **Map Partners:** On the following page in the Partnership Map, add the partners from the list below to the appropriate category in the diagram. Remember some partners may belong in more than one category.

3) **Brainstorm & Map Values:** Now, consider the choices that there various partners make. What does that tell you about their values as individuals, groups or organizations? Use one color to represent values and write these values next to each partner in their corresponding place on the map.

4) **Brainstorm & Map Interests:** Next, what are these partner's interests. Put yourself in their shoes. Remember that these partners could be operating on the basis of conflicting interests. In particular, consider your partner's interest in the work of your project. Write these interests next to the values you identified above.

5) **Brainstorm & Map Assets and Access to Resources:** Think about what specific resources each partner has unique access to. Is it direct access? Indirect access? What decision-making power do they have? What networks can they bring with them? Whom can they exercise influence over? Those resources, networks and people are all assets.

   A) Primary Resource: The most accessible resources are those that are located in the neighborhood or community and controlled by those who are members of that neighborhood or community (e.g., local business, people, churches, grant funding, sports teams).

   B) Secondary Resource: The next most accessible resources are those that are located in the neighborhood or community, but are controlled buy individuals and/or organizations outside the neighborhood or community (e.g., public schools, libraries, chain businesses, radio, TV).

   C) Potential Resource: The least accessible resources. They are located outside the community.

   List the resources and assets you have identified next to the partners name with whom you will leverage those assets against to accomplish your goals.

Partnership List

Individual	Group	Organization

Partnership Map

Partnerships

Partner	Values/Insight	Assets	Resources

Leadership

Partner	Values/Insight	Assets	Resources

Supporters

Partner	Values/Insight	Assets	Resources

Competition

Partner	Values/Insight	Assets	Resources

Opposition

Partner	Values/Insight	Assets	Resources

Tool 3: Sharing Your Vision

Our motivating vision will articulate both a "nightmare" - a concrete, urgent need for change in moral (injustice) and specific (lack of access to high-quality, low-cost care) terms - and will contrast this challenge with a "dream" - source of hope, also articulated in moral and specific terms.

So, what is the motivating vision of the partnership? Building on the story of now, ask yourself:

- What is the intolerable condition that we want to end or avoid?
- Why is it urgent now?
- What is at stake?
- What will happen if we do not act?
- What could happen if we do?

As you consider these questions, try to be as specific as possible. Focus on achieving a practical, tangible change.

When thinking about our motivating vision it often helps to visualize the world as we want it to be and then describe how the world will be different once we have achieved that vision.

For Example:

Think of a patient who will be positively impacted if the partnership is successful. Describe how their daily experience will be altered. How will their life be affected? How will they interact with the healthcare system? How will they take care of their health? How will their family and caregivers' experiences be changed? How many more patients could experience this?

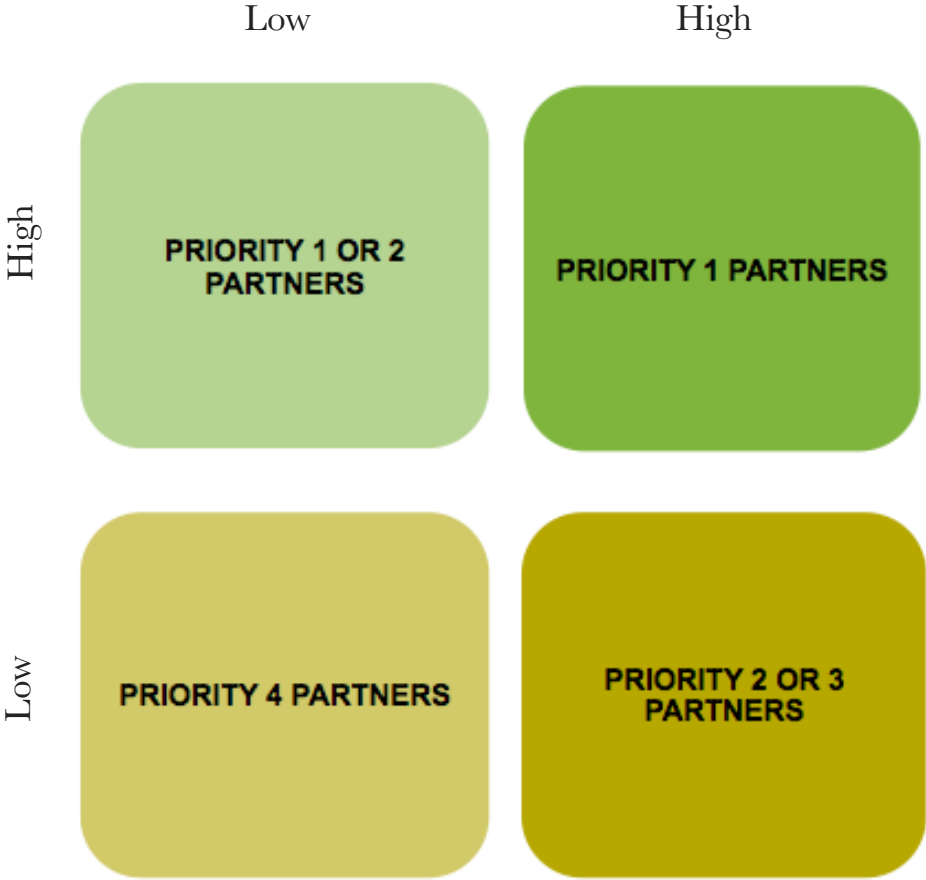Use the following page to draft a one-page motivating vision for your partnership.

Motivating Vision

Tool 4: Engaging Your Partners

Step 1. Organizing our Thinking: As you approach your partner engagement strategy it is important to understand the influence both you and your partners have on the success of the task at hand. Below you will see how to organize your thinking when prioritizing partnership engagements and their impact on your efforts.

Partners Influence on Us

Our Impact on the Partner

High

Our success is not necessarily dependent upon this partner, but they do depend on us.

We will treat this group fairly, honor our commitments, keep them satisfied insofar as balance of cost and benefits allow.

Our success is highly dependent on this partner.

We will **proactively** invest time and resource in this group; work to understand needs and concerns and develop solutions.

Low

This partner really has no impact on our success.

Relatively low priority. We will provide access to information about our decisions.

This partner has moderate impact on our success

We will keep this group involved and informed, but ensure balance between concerns of high influence partners and those people actually impacted by our decisions.

Step 2. Prioritizing your Partners: Using the logic laid out on the previous page, start to think about where the partners you identified earlier begin to fall within this framework. Where would you place each partner?

	Low	High
High	PRIORITY 1 OR 2 PARTNERS	PRIORITY 1 PARTNERS
Low	PRIORITY 4 PARTNERS	PRIORITY 2 OR 3 PARTNERS

Step 3. Identifying and Prioritizing Partner Subsets: This step will help us get organized and ensure we consider all partners involved.

Priority Level	Individuals	Groups	Organizations
P1			
P2			
P3			
P4			

Step 4. Identifying Partner Objectives, Interests, & Success: This step will help us better target our outreach approach and content aimed at each partner subset.

Priority	Individual / Group / Organizations	Objectives	Needs	Challenge(s) Are there any known challenges we need to be mindful of with this partner?
P1				
P2				
P3				
P4				

Step 5. Engagement Planning: This step details the approach we'll use to engage identified partners.

Priority	Individuals / Groups / Organizations	Objectives	Message	Mode / Tools	Frequency
P1					
P2					
P3					
P4					

Tool 6: 30-60-90 Day Plan

Activity	Timing	Owner