PARTNERSHIP
SELF-ASSESSMENT
TOOL

Instructions for Using the Tool Offline

These instructions pertain **specifically** to using the Tool questionnaire as a pen and paper instrument, calculating the results manually, and entering partnership results in the Tool Report. **Before** reading this document, be sure to go over the information in the *Coordinator Guide* and review the *Tool Questionnaire* and the text of the *Tool Report* very carefully (these documents are available at www.partnershiptool.net/psat.html).

Using the questionnaire as a pen and paper instrument

The questionnaire takes about 15 minutes to complete. Questionnaires should be handed out to **every participant (including the coordinator) who is familiar with the way the partnership works**. (See the *Coordinator Guide* for advice about determining which members of your partnership should fill out the questionnaire.) Each participant should fill out the questionnaire **privately and on his or her own time**.

To assure anonymity, participants should be instructed not to share their responses with others, not to write their name or identify themselves anywhere on the questionnaire, and **to return their questionnaire in a manner that does not reveal their identity.** This may be achieved by providing covered boxes or bins at one or more convenient partnership locations so that participants may turn in questionnaires without having to hand them to anyone. For convenience, you may also instruct respondents to submit questionnaires by mail without a return address.

As described in the *Coordinator Guide*, s**et a 30-day deadline for completion of questionnaires that begins the day you receive the first completed questionnaire.** For the results to be valid, **at least 65% of the questionnaires must be completed and returned within that 30-day period.** To aid in achieving this response rate, the coordinator should keep track of this time period, count how many questionnaires have been returned at set intervals, and send out reminder emails and/or post announcements to bolster the response rate.

Calculating the Results

Once 65% of the questionnaires have been returned and the partnership's deadline has elapsed, the coordinator (or coordinator's designee) will calculate the results to insert in the Tool Report through a simple process involving means (averages) for some questions and frequencies (percentages) for others.

The first calculation is the final response rate, which is derived by dividing the number of completed questionnaires that were returned with the 30-day time period by the total number of questionnaires distributed to partnership participants. For example, **if you handed out questionnaires to 20 participants and 15 were returned completed within the allotted time, the response rate is calculated as follows: 15/20 = 0.75 or 75%.**

Questions relating to your partnership's collaborative process (**synergy, leadership effectiveness, efficiency, effectiveness of administration and management, sufficiency of non-financial resources,** and **sufficiency of financial and other capital resources)** will require the calculation of means (or averages). To do this, you will need to assign numerical values to the answer categories for each question, with 1 being the least positive and 5 being the most positive response. Some examples from the questionnaire are as follows:

5. Extremely Well	5. Excellent	5. All of what it needs
4. Very Well	4. Very Good	4. Most of what it needs
3. Somewhat Well	3. Good	3. Some of what it needs
2. Not So Well	2. Fair	2. Almost none of what it needs
1.Not Well at All	1. Poor	1. None of what it needs

Each result for each question is calculated separately by adding up the values selected by respondents and then dividing that number by the number of people who responded. (*Note: All calculations should be rounded to **one** decimal point.)* If a partnership member did not answer a particular question then this individual is simply not included in the calculation for that item; **anyone who answers "Don't Know" to a question offering that option should also be left out of the calculation for that item**.

For example, let's say five partners completed the questionnaire and answered the Efficiency questions 1-3 as follows:

1. **For the question about use of partners' <u>financial resources</u>:**

    1 respondent answered <u>Very good</u> use (value=4)
    3 respondents answered <u>Good</u> use (value=3)
    1 respondent answered <u>Fair</u> use (value = 2)
    (No one answered excellent or poor use)

    Use of Financial Resources Score = 4+3+3+3+2(total 15) divided by 5 respondents = 3.0

2. **For the question about use of partners' <u>in-kind resources</u>:**

1 respondent answered <u>Excellent</u> use (value=5)
2 respondents answered <u>Very good</u> use (value=4)
1 respondent answered <u>Fair</u> use (value=2)
1 respondent: didn't answer question

Use of In-kind Resources Score: 5+4+4+2(15) divided by 4 respondents = 3.75 (round to 3.8)

3. **For the question about use of partner's <u>time</u>:**

3 respondents answered <u>Good</u> use (value = 3)
1 respondent answered <u>Fair</u> use (value = 2)
1 respondent answered <u>Poor</u> use (value = 1)

Use of Time Score: 3+3+3+2+1(13) divided by 5 respondents = 2.6

To calculate the OVERALL score for a category (e.g., the overall Efficiency score), add the means of all of the question scores under that category and divide that number by the number questions in the category.

Efficiency Score: 3.0+3.8+2.6(9.4) divided by 3 efficiency questions = 3.13 (3.1)

This score would place a partnership in the **Work Zone** for Efficiency (the zones are described below and in the text of the Tool Report itself).

For questions relating to how respondents view the partnership's **decision-making process**, the **benefits and drawbacks** they experience as a result of their participation and their **overall satisfaction** with the partnership, calculate the ***percentage*** of total respondents who gave each answer by dividing the number of people checking a particular response category by the total number of respondents.

For example, let's say five partners who completed the questionnaire responded to the Satisfaction with Partnership Question E (regarding satisfaction with implementing plans) as follows:

0 respondents: Completely Satisfied (0/5 = 0.0 or 0%)
1 respondent: Mostly Satisfied (1/5 = 0.20 or 20%)
2 respondents: Somewhat Satisfied (2/5 = 0.40 or 40%)
2 respondents: A Little Satisfied (2/5 = 0.40 or 40%)
0 respondent: Not at All Satisfied (0/5 = 0.0 or 0%)

*Note: Since this questionnaire is being filled out as a pen and paper instrument, it will be possible for respondents to miss/skip questions. Therefore, responses may add up to **less** than 100%.*

Entering your partnership’s results in the Tool Report

Once all of the means and frequencies have been calculated, your partnership’s results may be inserted in the corresponding sections of the report for dissemination to, and discussion by, everyone in your partnership. Everything your partnership needs to interpret the results and begin to take action is contained within the report. This includes a key to the overall category scores as follows:

- 1.0-2.9 Danger Zone: this area needs a lot of improvement
- 3.0-3.9 Work Zone: more effort is needed in this area to maximize the partnership’s collaborative potential
- 4.0-4.5 Headway Zone: your partnership is doing pretty well in this area but has potential to progress even further
- 4.5-5.0 Target Zone: your partnership currently excels in this area and needs to focus attention on maintaining a high score

If you would like assistance in calculating or interpreting your partnership’s results, please send an e-mail to partnershiptool@nyam.org.