Social Partnership Assessment Tool

GUIDANCE

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Contents

Assessment Tool

The purpose of this tool is to provide a simple way of assessing the effectiveness of partnership working.

It enables a rapid check which identifies problem areas. This allows partners to focus remedial action proportionate with the seriousness and urgency of any problems.

For those just setting up partnerships the Tool provides a checklist of what to ensure and what to avoid.

It has been designed explicitly as a developmental tool rather than as a means for centrally assessing social partnership performance.

How can the assessment tool help you?

- It provides material to help you assess the current effectiveness of your partnership working.

- It provides a focus on ways to strengthen existing partnerships by engaging in discussion about issues and ways forward.

- With repeated use, it can allow you to chart changes in partnership working overtime.

- It can highlight a range, and possible diversity, of perspectives.

- It will not on its own tell you how all the problems associated with partnership working should be addressed.

- It does, however, provide a common framework (and vocabulary) for partners to develop a jointly owned approach to tackling some of the barriers to effective partnership working.

Characteristics of Effective Social Partnerships

Officials in Welsh Government have undertaken a review of social partnership across the Department.

The review provided a better understanding of the current landscape and to work toward recommendations to support effective partnership working.

Phase 2 of this review explored the behaviours, principles, and relationships underpinning social partnership in Wales and sought to identify common beneficial characteristics which support social partnership at a national level.

The review found that there are a set of common fundamental characteristics which underpin effective social partnership at a national level in Wales regardless of the sector. These characteristics appear to provide the catalyst required for meaningful engagement that can lead to improved outcomes. The characteristics have been split into five categories:

1. Clarity of group purpose and objectives

Social partnerships based on a clearly defined purpose and goals are more likely to produce and maintain effective engagement. Clarity helps to set the context and parameters for engagement and ensures each partner understands their role and the role of others. This also helps to set individual and group expectations for partnership working.

2. Early, continuous, and consistent engagement between partners

Social partnership relies on high levels of involvement and participation from all parties. It is therefore highly beneficial for partners to have meaningful and continuous engagement from the outset and throughout the problem solving/policy development process. This re-enforces the collaborative element of partnership working and places value on the input of all partners.

3. Commitment to collaborative working and social partnership principles

Social partnership principles include cooperation, respect, trust, voice and participation, and the pursuit of mutual gains. The pursuit of mutual gains sits at the heart of the concept of social partnership and differentiates it from other forms of engagement. It relies on an environment in which all partners feel equally valued and respected and is underpinned by strong informal and formal working relationships. Moreover, where working relationships are effective the commitment to partnership working appears sufficiently robust to withstand most challenges.

4. Clear understanding of how information and decisions are cascaded and implemented

In successful social partnerships these are two-way channels passing information and decisions down to all levels and returning feedback and insight from working on the ground, making it meaningful to employees.

5. Formal arrangements and willingness to review success

Clear arrangements to monitor and review success are key to maintaining commitment to social partnership between partners. Periodic reviews provide regular opportunities to strengthen social partnership by identifying areas which can be improved or by learning from examples of good practice.

How to use the Tool

This Tool has been developed to use either:

- to provide a focus for discussion between partners, or

- through facilitated workshops.

Preparation

It is important at the start of the process that partners agree the reasons for using the Tool. Is the process to be mainly developmental, more of a routine check in or part of a more extensive remedial programme?

Those participating need to be assured not only that taking the trouble to undertake the assessment is worthwhile but that they can be, and should be, frank and honest in their responses.

Opening this initial debate can enable individual partners to be more honest in their views about the workings of the partnership.

Agree at the outset whether facilitation is needed. Facilitation can be conducted internally. Sometimes, and especially where it is expected to be difficult or sensitive, it may be better conducted externally.

Completing the Assessment

Each partner should initially complete the assessment individually, indicating their responses to a set of statements grouped under each of the six headings.

Partners then need to share and discuss their individual assessments, examining areas of common or differing views about partnership strengths and weaknesses.

Collectively agree the scores for each of the six sections. A grid to interpret the results is at Page 8.

Collectively you should also consider how you would weight the six areas in terms of their current significance for your partnership – given its nature and stage of development (Page 9). This will help prioritise where any remedial action is needed.

The assessment tool should provide a clear indication of the nature and scale of problems, of where action is needed most and where it is required most urgently.

Using the findings

Partners can look behind their scoring and explore comments about individual elements and their weighting of significance. The essence of this feedback and analysis is to better understand partnership strengths and weaknesses and, if necessary, plan remedial action. What this Tool does is to reveal simple areas upon which to concentrate and allows a focus of effort and resources.

What becomes readily, apparent is where there is broad agreement or disagreement across partners. The depth to which the responses need to be explored – and the way in which they are explored – depends largely upon the degree of consensus, the nature of the findings, and the significance attached to the findings by partners.

Thus, if all partners are agreed that the partnership is reasonably healthy across all areas, including those generally agreed to be the most significant, there is little need of action planning beyond agreeing when and how to conduct the next 'health check'.

If, however, some partners have assessed the partnership as 'unhealthy' in some respects – and especially if this is in areas generally agreed to be significant – this will require further detailed examination. Depending upon the sensitivity of the issues and the size of the partnerships this examination is often best done in a facilitated feedback workshop.

The principal aim of this Tool is to enable generic assessment of partnership working. It cannot offer detailed prescriptions for addressing the problems identified in any partnership.

Where some problems or weaknesses are identified, action planning should focus on these areas. Where there is little sensitivity about the issues raised – whether individual or organisational – more detailed analysis of what underlies the assessment findings may well be conducted internally and informally. Where there is greater sensitivity external facilitation may be preferable.

Undertaking the Assessment

In the following pages individuals are asked to consider a series of statements about the Partnership – as a whole. Indicate the extent which you agree or disagree with each of these statements by ticking, or marking, the appropriate boxes.

Clarity and purpose

	1 Strongly Disagree	2 Disagree	3 Not sure	4 Agree	5 Strongly Agree
Our partnership has a clear goal.					
We have clearly defined joint aims, objectives, and service outcomes.					
In my opinion, there is a shared understanding of, and commitment to these among all partners.					
The lines of communication, roles and expectations of partners are clear.					
All partners are willing to share some of their ideas, resources, influence, and power to fulfil the goals and aims of the partnership.					
Score					
TOTAL					

Social Partnership approach

	1 Strongly Disagree	2 Disagree	3 Not sure	4 Agree	5 Strongly Agree
I believe there is a clear commitment to social partnership working from the most senior levels of each partnership organisation.					
There is widespread ownership of the partnership across and within all partners.					
There is a clear understanding of each partners' contributions towards achieving the goals of the partnership.					
The perceived benefits of the partnership outweigh the perceived costs.					
There have been substantial past achievements within the partnership.					
Score					
TOTAL					

Relationships

	1 Strongly Disagree	2 Disagree	3 Not sure	4 Agree	5 Strongly Agree
There is a history of good relations between the partners.					
I can express alternative views within the partnership and believe others are also able to do so.					
There are formal structures or procedures for resolving disputes.					
There are informal ways of achieving this.					
Commitment to partnership working is sufficiently robust to withstand most threats to its working.					
Score					
TOTAL					

Principles and values

	1 Strongly Disagree	2 Disagree	3 Not sure	4 Agree	5 Strongly Agree
The principles/ values/ behaviours expected of members are explicit and understood.					
Partners share the commitment to success through joint problem solving, compromise and reaching consensus.					
Relationships are based on integrity, authenticity, transparency, openness, and selflessness.					
There is sufficient trust within the partnership to survive any mistrust that arises elsewhere.					
In my opinion, there is equal participation based on proactive and timely sharing of information, consultation, and engagement.					
Score					
TOTAL					

Collaborative Action

	1 Strongly Disagree	2 Disagree	3 Not sure	4 Agree	5 Strongly Agree
The administrative, communication and decision-making structure of the partnership is as simple as possible.					
All partners are involved in planning and setting priorities for collaborative action.					
All partners have the task of communicating and promoting the partnership in their own organisations/ to their members.					
There is a clear understanding of how information and decisions by the partnership are actioned at workplace level.					
The roles, responsibilities, and expectations of partners for collaborative actions are clearly defined and understood by all partners.					
Score					
TOTAL					

Reviewing Success

	1 Strongly Disagree	2 Disagree	3 Not sure	4 Agree	5 Strongly Agree
The partnership has clear arrangements to monitor and review how successfully its objectives are being met.					
There are clear arrangements to review how the partnership itself is working.					
There are clear arrangements to ensure that partnership working arrangements are reviewed and, where necessary revised.					
The partnership can demonstrate or document the outcomes of its collective work.					
There is a clear need for and commitment to continuing the partnership in the medium term.					
Score					
TOTAL					

Understanding the results

In simple terms you can interpret the results as follows:

Assessment Scores

	<10	11-15	16-20	21-25
Clarity and purpose	The partnership lacks any clarity or sense of purpose.	Only limited clarity and purpose exists.	There is reasonable understanding of purpose.	The purpose of the partnership is very clear.
Social Partnership approach	Recognition and acceptance of the need for social partnership is minimal.	Recognition and acceptance of the need for social partnership is limited in some areas.	The need for social partnership is recognised and accepted.	There is very high recognition and acceptance of the need for social partnership.
Relationships	Relationships amongst partners is poorly developed.	Relationships need building.	Good relationships are in place.	Relationships are very strong and based on mutual trust.
Principles and values	Principles are not well understood and need development.	Work is needed to embed principles for social partnership working.	Principles are understood and show signs of embedding.	Principles are very well understood and embedded.
Collaborative Action	Partnership working arrangements are poor.	Partnership working arrangements are insufficiently clear and robust.	Arrangements for collaborative working are reasonably clear and robust.	Clear and robust arrangements lead to collaborative action.
Reviewing Success	Monitoring is poor in most respects or not at all	The partnership could improve how it monitors and learns from its performance.	The partnership monitors, measures and learns from its performance reasonably well.	The partnership monitors, measures and learns from its performance very well.

	Low significance	Medium significance	High significance
Clarity and purpose			
Social Partnership approach			
Relationships			
Principles and values			
Collaborative Action			
Reviewing Success			