

Partnership Health Reflection for Partners

This self-reflection is designed to support intentional learning and continuous improvement within a partnership. It provides an opportunity for partners to assess the current health of the partnership across several key indicators and to identify areas of strength and priority areas for growth.

Instructions:

1. **Review each partnership health indicator** by category and/or subcategory (e.g., financial, customer, process, and learning and growth)
2. **Individually reflect** on the current state of the partnership for each indicator based on your experiences to date.
3. **Rate each indicator** using the 3-point Partnership Health Rating Scale provided. Select the rating that best represents the partnership's current reality, not the ideal state.
 -  - Working well overall
 -  - Generally functioning but could be strengthened or improved
 -  - A lot of questions or areas/issues to work on
4. **Provide brief notes or examples** to explain your rating, especially for indicators rated lower or higher.
5. **Complete the reflection independently** before any group discussion to ensure multiple perspectives are surfaced.

Using the results:

The purpose of this reflection is learning and improvement—not evaluation. Ratings will be used to:

- Identify strengths to sustain and leverage
- Surface areas needing clarification, alignment, or support
- Inform focused conversations and next steps for strengthening the partnership

Be honest and thoughtful in your responses. Diverse perspectives are expected and valued, and differences in ratings can provide important insights for strengthening the partnership over time.

Partnership Health Self-Reflection (★ or ✓ or ?)

Category/SubCategory	Rating	Notes
<p>Financial: Partners demonstrate effective and efficient marketing and sales pipeline to drive growth and financial health Indicators: # of leads generated, conversion rates, # of deals closed, revenue generated</p>		
<p>Customer - Satisfaction: Partnership produces overall high satisfaction and retention rate. Indicators: net promoter score/satisfaction score from LEA, customer retention rates</p>		
<p>Customer - Impact: Partnership demonstrates positive outcomes for students, educators, and leaders Indicators: Impact - (teacher) quality of PL services, quality of teacher practice, teacher self-efficacy, student growth mindset//engagement & mindset, and student achievement</p>		
<p>Process - Operation Efficiency & Process Partners effectively work together with defined roles and coordination. Indicators: defined roles, joint sales coordination, sales training offerings</p>		
<p>Process - Communication & Trust Partners effectively communicate with each other and are confident in each other's ability to follow through. Indicators: staff satisfaction with communication, and use of communication plan</p>		
<p>Learning & Growth - Alignment & Complimentary Products/Services Partners demonstrate commitment to shared vision and enhance each other's products and services. Indicators: Strategic Alignment - regular planning meetings, co-branded sale materials, identified target markets and marketing materials, Complimentary Products/Services - joint product training, partner satisfaction measures</p>		

<p>Learning & Growth - Innovation & Quality Partners continuously improve services/product through effective collaboration in response to customer’s needs. Indicators: Evidence of tailoring and improving offerings based on customer needs</p> <ul style="list-style-type: none"> • Sustainability - evidence of risk mitigation, contingency plan, and sustained business agreement 		
<p>Learning & Growth - Sustainability Partners take actions regularly to problem solve and mitigate risks and barriers to sustain the partnership. Indicators: evidence of risk mitigation, contingency plan, and sustained business agreement</p>		

Based on review of the ratings (★ or ✓ or ?) across the different indicators, rate the overall health of the partnership:

	<p>Strong & Strategic - highly aligned, mutually beneficial, roles are clear, communication is strong, decision making is shared, and advancing our shared goals</p>
	<p>Functional & Productive - working well overall, general alignment and trust, with some effective coordination, though some areas could be strengthened</p>
	<p>Developing & Inconsistent - shows potential but lacks consistency. Alignment, communication, or clarity of roles is uneven, limiting effectiveness</p>
	<p>Misaligned & Fragile - is strained or unclear. Goals, expectations or roles are misaligned and the partnership provides limited value in its current form</p>

What are the implications for your partnership?