



Advice and Financial
Inclusion Partners
Partnership
Checklist

Purpose of Partnership Survey

This checklist has been developed to encourage partnerships to critically review their 'fitness for purpose' in addressing shared outcomes.

This version of the checklist is aimed at already established advice service and financial inclusion partnerships or where partners are considering creating a new partnership. Individual questions can be tweaked to make it suitable for other types of partnerships.

It is intended that the checklist should be used to survey the views of those involved in the partnership with regard to:

- assessing how effective partnership working currently is
- identifying areas where there may be scope for improvement and for further strengthening the impact of the partnership's work.



We have produced an online guide to applying the partnership checklist approach. You can find it at <https://youtu.be/huLs-uCdJP8>

Focus of Partnership Survey

The survey asks about your experience of partnership working and respondents are asked to answer the questions with reference to the particular partnership group that is under review.

The questions that the survey focuses upon are derived from research evidence and good practice concerning what makes for effective, outcome-focused partnership working.

The survey is fairly detailed in order to help gain a deep understanding of how the partnership is working and where there may be scope to strengthen.

The questionnaire should take approximately 20 minutes to complete.

The partnership checklist sets out a number of statements concerning partnership working. Respondents are invited to rate the extent to which they agree/disagree with each statement.

Each question should be scored against the undernoted scale:

| Strongly Disagree | | Neither Agree nor Disagree | | Strongly Agree | Not Appropriate | Don't Know |
|-------------------|---|----------------------------|---|----------------|-----------------|------------|
| 1 | 2 | 3 | 4 | 5 | | |

The 'Not Appropriate' option should be used when the respondent feels the particular statement does not apply to the partnership.

At the end of each section there is a 'comments' box and you are invited to provide any additional information that you think is relevant or to elaborate on specific issues that you think require attention.

The 'Don't Know' option should be used when the respondent feels that they do not have sufficient information about the particular statement to enable them to make a judgement.

All survey responses will be anonymous and will not be attributed to individual respondents.

The intention is that the survey should be completed by each individual involved in the partnership. Survey findings should then be analysed and a short report compiled setting out the responses and comments. This report should then be used as the basis for facilitating a structured discussion of the partners, with a clear focus on agreeing issues to be addressed and setting out an improvement action plan.

The overall purpose is to help the partnership identify improvement actions that can result in more effective working and in the achievement of enhanced outcomes.

Section A - Partnership Remit, Structure, Membership, and Meetings

- The advice services/financial inclusion partnership has a clear and unambiguous remit.
 - a. This includes a strong common focus on client outcomes.
- Each of the individual organisations involved in the partnership has a clear role and an agreed understanding of what is expected of them.
 - a. The roles between funders and providers within the partnership are clear and align to the good practice principles as outlined in the [Framework for Public Funding of Advice](#).
- Partners meet on a regular basis and also have a system in place for communication to take place on a daily basis as and when required. Good practice examples of this partnership working would be how the [Dundee Advice Network](#), [Aberdeen Financial Inclusion Partnership](#) and [North Lanarkshire Advice Network](#) use the Knowledge Hub.
- Partnership meetings are usually well attended and that organisations involved in the partnership adds value in what they bring to the partnership in terms of contributing to the priority outcomes.
- The key organisations that can contribute to achieving the partnership's priority outcomes are involved and there is no obvious partner missing.
- Partnership meetings are well organised, effective and a good use of time.
- Partnership meetings have a clear agenda, papers circulated in advance of meetings and accurate minutes taken.
- Partnership meetings are well chaired.
- The partnership has strong and effective leadership.
- There is reasonable continuity of input from individual partners (i.e. representatives of partner organisations do not continuously change).
- There is clarity about the role that the partnership plays within the overall Community Planning Partnership.
- The structures and responsibilities of the partnership do not result in unhelpful overlap and duplication with other elements of the Community Planning Partnership.

- The partnership has sub groups for relevant topic areas which feed into local and national strategies and outcomes frameworks. e.g. performance management, fuel poverty, food poverty, child poverty etc.
- Members of the partnership effectively communicate decisions of the partnership within their own organisations and ensure that key partnership decisions are acted upon.
- The overall culture of the partnership and the behaviours typically displayed by individual members demonstrate a commitment to work together effectively.
- Partnership meetings take place within a positive spirit of transparency, openness and trust.
- The individuals involved in the partnership offer constructive criticism and regularly challenge each other and the partnership as a whole to 'do more' and continue to improve outcomes.

Thinking about the issues covered in this section; do you have any other comments or suggestions on how the partnership can improve its operation and impact?

Section B - Outcomes Focus

- The partnership has a clear statement of the priority outcomes that it is focusing upon (i.e. the difference that it ultimately aims to make within the community).
- There is a genuinely shared commitment to the achievement of the priority outcomes amongst all stakeholders involved in the financial inclusion partnership.
- The partnership's priority outcomes are reflected clearly in the Community Planning Partnership and Local Outcome Improvement Plan.
- The partnership's priority outcomes are reflected clearly in the strategic and operational plans of each partner organisation.
- The partnership's priority outcomes are reflected clearly in the resource allocation processes/decisions made by the other partner organisations (including decision-making about resource reductions).

Thinking about the issues covered in this section, do you have any other comments or suggestions on how the partnership can improve its operation and impact?

Section C - Informed by Evidence

- The partnership has used the available evidence base (including data, research, evaluation reports, etc) to develop a good understanding of the key issues/ challenges/opportunities within its area of focus.
- The partnership has effectively *prioritised* the key *outcomes* that it is focusing upon (e.g. as opposed to 'spreading the priorities too thinly' across a large number of outcomes).

Thinking about the issues covered in this section, do you have any other comments or suggestions on how the partnership can improve its operation and impact?

Section D - Delivery Arrangements

- The partnership has developed a useful, outcome-focused action plan for achieving the priority outcomes.
- The individuals involved in the financial inclusion partnership are sufficiently empowered and influential to significantly progress the key issues.
- The key focus of the financial inclusion partnership's activities is upon addressing the root causes of the issues that it has prioritised. (For example, by focusing on early intervention/preventive measures).

Thinking about the issues covered in this section, do you have any other comments or suggestions on how the partnership can improve its operation and impact?

Section E – Performance Management and Reporting

- The partnership has an agreed set of targets, which clearly reflect its priority outcomes.
- The targets set for the financial inclusion partnership are as ‘SMART’ as is appropriate/reasonably possible.
- The targets set for the financial inclusion partnership are ambitious/stretching.
- There is an efficient and robust system in place for recording progress made towards the achievement of outcome targets and the inputs, activities, outputs that contribute towards them.
- The partnership actively uses performance information to facilitate constructive strategic discussion and, where required, to instigate corrective action in order to address under-performance against key targets.
- The partnership’s action plan acts as a strong basis for accountability and challenge due to it clearly identifying individual partner inputs, actions, responsibilities and delivery timescales.
- There is a clear reporting linkage between the financial inclusion partnership and the overall Community Planning Partnership board.
- There is a clear performance reporting linkage between the financial inclusion partnership and each of the individual partner organisations.
- Key decisions of the partnership are reported back to stakeholders in each partner organisations.
- By working together, the partnership has demonstrably (please select all that apply):
 - Tackled cross-cutting issues more effectively
 - Developed a better shared understanding of key issues
 - Made better use of the partners’ collective resources
 - Provided individuals/communities with a more convenient, effective and joined-up service
 - Shifted resources towards a greater emphasis on early intervention / prevention
 - Delivered a higher quantity of priority outcomes
 - Delivered a higher quality of priority outcomes
 - Delivered more sustainable outcomes

Achieved other benefits/added value (please specify)

Thinking about the issues covered in this section, do you have any other comments or suggestions on how the partnership can improve its operation and impact?

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