

STRATEGIC ALLIANCE - PARTNER ANALYSIS WORKSHEET

	Your Organization Name	Potential Partner Name
Client Perspective		
Programmatic impact	<ul style="list-style-type: none"> <Same or similar programs & services> 	
	<ul style="list-style-type: none"> <Programs & services that are different or complimentary to Potential Partner programs & services> 	<ul style="list-style-type: none"> <Programs & services that are different or complimentary to Your Organization programs & services >
Funder Perspective		
Strategic positioning with funders	<ul style="list-style-type: none"> <Same or similar funders or funding sources> 	
	<ul style="list-style-type: none"> <Funding sources that are different or complimentary to Potential Partner> 	<ul style="list-style-type: none"> <Funding sources that are different or complimentary to Potential Partner>
Governance Perspective		
Board of Directors	<ul style="list-style-type: none"> <Shared or similar board skills and experience to support program expansion and future board recruitment> 	
	<ul style="list-style-type: none"> <# board members> <Skills & experience of board members> <Geographic representation of board members> 	<ul style="list-style-type: none"> <# board members> <Skills & experience of board members> <Geographic representation of board members>

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Administrative Perspective		
Volunteer Recruitment & Retention	<ul style="list-style-type: none"> <Describe shared or complimentary volunteer activities> <Types of volunteers or special skills of volunteers> 	<ul style="list-style-type: none"> <Types of volunteers or special skills of volunteers>
Staff Retention & Development	<ul style="list-style-type: none"> <Benefits available to staff> <Professional development available to staff> 	<ul style="list-style-type: none"> <Benefits available to staff> <Professional development available to staff>
Administrative	<ul style="list-style-type: none"> <Description of administrative support services of Your Organization. Ex: HR Staff, Finance Staff, etc.)> 	<ul style="list-style-type: none">
Technology	<ul style="list-style-type: none"> <List of technology solutions and services applicable to strategic alliance. Ex: case management software, financial system, etc.)> 	<ul style="list-style-type: none"> <List of technology solutions and services applicable to strategic alliance. Ex: case management software, financial system, etc.)>

IMPORTANT FACTORS TO CONSIDER

- Merger Costs
- Relationships with Funders, Policymakers
- Volunteer Retention
- Staff Retention
- Branding/Marketing

PARTNERSHIP ANALYSIS WORKSHEET- EXAMPLE

	Organization A	Organization B
Client Perspective		
Programmatic impact	<ul style="list-style-type: none"> Complementary programs provide opportunity for continuum of care at the federal, state, and local level for women and their families during and post-incarceration. 	
	<ul style="list-style-type: none"> Programs serve individuals in federal and state community re-entry programs Program serving incarcerated mothers, their children, and caregivers is participating in longitudinal study with Wilder Research Institute Resources for post-release support in job skill training, employment placement, and transitional housing Experience with gender-specific program models 	<ul style="list-style-type: none"> Program serves women in County community re-entry programs Program includes creative and wellness components Experience with gender-specific program models
Financial Perspective		
Strategic positioning with funders	<ul style="list-style-type: none"> Complimentary funding sources provide access to broader range of resources for on-going and future programming. 	
	<ul style="list-style-type: none"> Long-term relationships with government funders 	<ul style="list-style-type: none"> Funding from private donors Foundations

PARTNERSHIP ANALYSIS WORKSHEET- EXAMPLE

Governance Perspective		
Board of Directors	<ul style="list-style-type: none"> • Complimentary board skills and experience to support program expansion and future board recruitment 	
	<ul style="list-style-type: none"> • 16 member board • Board experience in philanthropic giving, real estate development, healthcare, and legal • Regional representation Dallas, Fort Worth, and Houston 	<ul style="list-style-type: none"> • 10 member board • Board experience includes fundraising, healthcare, medical, and hospice care • Dallas-based members
Administrative Perspective		
Volunteer Recruitment & Retention	<ul style="list-style-type: none"> • Complimentary volunteer support • 	
	<ul style="list-style-type: none"> • Strong corporate volunteer partnerships • 	<ul style="list-style-type: none"> • Committed individual volunteers
Staff Retention & Development	<ul style="list-style-type: none"> • Full benefits package available including healthcare insurance and 403(b) matching • Distributed training management system specializing in social services implemented in FY14 • Executive Development Program through partnership with the University of Notre Dame • National partnership with the Univ of Southern California's School of Social Work for training and intern placement 	<ul style="list-style-type: none"> •

PARTNERSHIP ANALYSIS WORKSHEET- EXAMPLE

Administrative Perspective (Continued)		
Administrative	<ul style="list-style-type: none"> • Full-time administrative staff to support HR, Finance, and IT functions • Affiliate member of 	•
Technology	<ul style="list-style-type: none"> • 24x7 Help Desk support • Connectivity at 63 locations across the state • Administrative support systems in HR and Finance • Community re-entry case management system in FY14 • Outcomes tracking system through national partnership with Bowman Systems 	•

IMPORTANT FACTORS TO CONSIDER

- Merger Costs
- Relationships with Funders, Policymakers
- Volunteer Retention
- Staff Retention
- Resolana name/brand