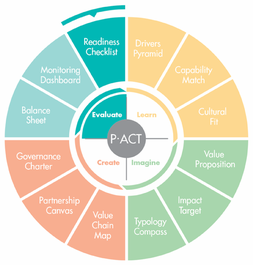
P·ACT

SEED promoting entrepreneurship for sustainable development

MIT D-Lab designing for a more equitable world

Welcome to the Workshop

Name of Workshop



Tool: Readiness Checklist

How ready are we to initiate the partnership?

Step-By-Step

Step 1 — Self-assess readiness and urgency

Step 2 — Discuss and address gaps

Step 3 — Review the partnership model

Facilitation

Teams

Partner 1

Organization's name	
Representatives	

Partner 2

Organization's name	
Representatives	

Steps 1 -2 **Self-assess readiness and urgency** | **Readiness - Clarity**

Click on the link to access the Spreadsheet

1. Clarity — Step 1 — Step 2 Discuss and address gaps

READINESS - CLARITY	To what extent do you agree with the following statements?	Partner 1	Partner 2	Barrier Assessment	Discussion Notes
Drivers	We can clearly identify and prioritize the drivers for our organization to engage in this partnership				
	We can clearly identify and prioritize the drivers for our partners to engage in this partnership				
Capabilities	We can clearly define our criteria for selecting our partners and how they respond to these criteria				
	We can clearly define our partner's criteria for selecting us as a partner and how we respond to these criteria				
Value	We can clearly define the value of this partnership to our partners				
	We can clearly define the value of this partnership to our organization				
Costs	We can clearly define the costs of this partnership to our partners				
	We can clearly define the costs of this partnership to our organization				
Culture	We can clearly identify our similarities and differences in terms of organizational culture and understand their potential implications on the partnership				

Answer Guide

Readiness Assessment: Strongly Disagree; Somewhat disagree; Somewhat agree; Strongly agree; Not sure

Barrier Assessment: Deal Breaker; Major Barrier; Minor Barrier; No Barrier

Steps 1 -2 **Self-assess readiness and urgency** | **Readiness - Convergence**

Click on the link to access the Spreadsheet

2. Convergence — Step 1 — Step 2 Discuss and address gaps

READINESS - CONVERGENCE	To what extent do you agree with the following statements?	Partner 1	Partner 2	Barrier Assessment	Discussion Notes
Partnership type	We have aligned with our partners on the type of partnership (type I, II or III) to pursue				
Value proposition	We have aligned with our partners on the partnership customers and its value proposition				
Social impact	We have aligned with our partners on the social impact targeted by the partnership (beneficiaries, outputs, outcomes, impacts)				
Value chain	We have aligned with our partners on the value chain to deliver the partnership value proposition				
Value & Cost share	We have aligned with our partners on our respective share of capturing value and assuming costs of the partnership				
Governance structure	We have aligned with our partners on a governance structure for the partnership				

Answer Guide

Readiness Assessment: Strongly Disagree; Somewhat disagree; Somewhat agree; Strongly agree; Not sure

Barrier Assessment: Deal Breaker; Major Barrier; Minor Barrier; No Barrier

Steps 1 -2 **Self-assess readiness and urgency** | **Readiness - Capacity**

Click on the link to access the Spreadsheet

3. Capacity — Step 1 — Step 2 Discuss and address gaps

READINESS - CAPACITY	To what extent do you agree with the following statements?	Partner 1	Partner 2	Barrier Assessment	Discussion Notes
Partnership activities	We have clearly defined the activities our organization will execute as part of the partnership				
Staff capacity	We have secured the staff capacity (number, skills and time) to execute our part of this partnership				
	We have secured the staff capacity (number, skills and time) to manage this partnership				
Resources	We have secured the resources (financial, infrastructure, relational...) necessary to execute our part of this partnership				
Processes	We have established the processes in place (due diligence, legal, regulatory, relationship management...) to support and manage this partnership				

Answer Guide

Readiness Assessment: Strongly Disagree; Somewhat disagree; Somewhat agree; Strongly agree; Not sure

Barrier Assessment: Deal Breaker; Major Barrier; Minor Barrier; No Barrier

Steps 1 -2 **Self-assess readiness and urgency** | **Readiness - Confidence**

Click on the link to access the Spreadsheet

4. Confidence — Step 1 — Step 2 Discuss and address gaps

READINESS - CONFIDENCE	To what extent do you agree with the following statements?	Partner 1	Partner 2	Barrier Assessment	Discussion Notes
Leadership buy-in	We have secured the commitment of our leadership to engage in this partnership				
Performance managemen t	We have strong confidence in our strategies to ensure the performance of this partnership				
Risk managemen t	We have strong confidence in our strategies to mitigate the risks of this partnership				
Partner capacity to execute	We strong have confidence in our capacity to execute our part of the partnership				
	We strong have confidence in our partners' capacity to execute their part of the partnership				
Relationship	We have strong confidence in the resilience of the relationship with our partners				
Governance structure	We have strong confidence in the governance structure to resolve any potential issues along the way				

Answer Guide

Readiness Assessment: Strongly Disagree; Somewhat disagree; Somewhat agree; Strongly agree; Not sure

Barrier Assessment: Deal Breaker; Major Barrier; Minor Barrier; No Barrier

Steps 1 -2 **Self-assess readiness and urgency** | **Readiness - Urgency**

Click on the link to access the Spreadsheet

5. Urgency — Step 1 — Step 2 Discuss and address gaps

READINESS - URGENCY	To what extent do you agree with the following statements?	Partner 1	Partner 2	Barrier Assessment	Discussion Notes
Strategic Goals	This partnership helps us achieve one or several of our short-term strategic goals				
Problem to Solve	This partnership helps us solve an urgent problem or need				
Pressures	This partnership helps us respond to urgent stakeholder (employees, investors, civil society...) pressures				
Competing Priorities	This partnership does NOT compete or conflict with other strategic priorities for our organization				
Competing Partners	This partnership does not compete or conflict with other potential partnerships				

Answer Guide

Readiness Assessment: Strongly Disagree; Somewhat disagree; Somewhat agree; Strongly agree; Not sure

Barrier Assessment: Deal Breaker; Major Barrier; Minor Barrier; No Barrier

Steps Description

Step 1 Self-assess readiness and urgency

1.1. Each partner needs to be equally ready to engage. Use the self-assessment spreadsheet individually to assess your **organizational readiness** for the partnership.

* **Clarity:** Are we clear on our respective motivations, expectations and capabilities?
* **Convergence:** Are we aligned on what we will achieve together, for whom and how?
* **Capacity:** Can we mobilize the people and resources necessary for the partnership?
* **Confidence:** Are we confident in the partnership we co-designed and in our collective capacity to implement it successfully?

1.2. In addition to readiness, partners need to have enough urgency to initiate the partnership. Individually complete the self-assessment of your organizational urgency for the partnership.

1.3. Reflect on your responses:

- Is our organization ready to commit to this partnership? What areas of readiness should we address before engaging? How might we do so?
- Is this partnership urgent enough to move ahead now? What would make this partnership more urgent? When may these conditions be in place?
- What other key takeaways can we conclude from completing this self-assessment?

Step 2 Discuss and address gaps

2.1. Share your self-assessment with your partner. Take a few minutes to independently review your partner's responses.

- Did anything surprise you?
- How does your partner's overall readiness to partner compare to your own?
- How does your partner's urgency to partner compare to your own?

2.2. Once you have reviewed each other's checklists, go back to each area of readiness. Identify those areas for which either partner has identified a low level of readiness or urgency. Then, together discuss the level to which each of these areas represent a barrier for moving forward with regards to the partnership.

* **Deal breaker:** The partnership can NOT move forward while this barrier exists.
* **Major Barrier:** The partnership can ONLY move forward if there is a solid plan to address this barrier.
* **Minor Barrier:** The partnership can move forward DESPITE the existence of this barrier.

2.3. For each of the identified barriers, have an open dialogue with your partner about the following questions and record your ideas and decisions:

- What are the key barriers we need to absolutely address before we can commit to initiating this partnership?
- How might we eliminate or reduce these barriers?
- How will we know that these barriers are sufficiently resolved to move forward?

Step 3 Review the partnership model

To close the loop on your co-design process and complete your Readiness evaluation, reflect one last time on the partnership model you have co-designed with your partners:

- Does it fulfill the partnership goals set by the partners collectively? - See output of the Drivers Pyramid tool.
- Does it create the value proposition expected by the customer? - See output of the Value Proposition tool.
- Does it generate the impact expected by or promised to the beneficiaries?- See output of the Impact Target tool.
- Does it create the value expected by each partner? - See output of the Partnership Canvas tool.
- If you have established with your partners that you have achieved enough readiness to initiate the partnership, Congratulations! The next step is to start developing your contractual agreement.