# Equity Fit Screen for Partnerships

## A PRACTICAL REFLECTION TOOL FROM PARTNERSHIP DYNAMICS IN COMMUNITY-BASED DEVELOPMENT ORGANIZATIONS

**by ThirdSpace Action Lab for the Community Opportunity Alliance**

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# Tool: Equity Fit Screen for Partnerships

*This tool accompanies the research report* **Partnership Dynamics in Community-Based Development Organizations***, by ThirdSpace Action Lab for the Community Opportunity Alliance. It is designed to be used as a standalone resource for evaluating and strengthening partnerships.*

## PURPOSE AND CONTEXT

The Equity Fit Screen is a reflection tool to assess whether proposed or existing partnerships advance racial equity, strengthen organizational sustainability, and benefit residents first. This screen emerged from our research with community-based development organizations (CBDOs) managing complex partnership portfolios. It provides a structured approach that allows organization leaders to slow down and reflect during partnership decision-making, particularly when organizations are moving at a fast pace and facing external pressure to partner.

*The tool is designed to reveal tensions between external partnership pressure and organizational capacity, mission alignment, and community benefit.*

## WHEN TO USE THIS TOOL

- When evaluating a potential new partnership
- When assessing whether to continue, deepen, or end existing partnerships
- When facing pressure from funders, boards, or peers to establish partnerships
- When multiple partnership opportunities compete for limited organizational capacity
- During strategic planning to evaluate whether a partnership portfolio aligns with mission

## HOW THIS TOOL WORKS

The Equity Fit Screen is organized into six critical dimensions of partnership alignment identified through research on successful CBDO partnerships: resident benefit, accessibility, reciprocity, cultural and mission alignment, data and learning, potential for change. Each section includes reflection questions to guide assessment. The tool is designed to reveal tensions between external partnership pressure and organizational capacity, mission alignment, and community benefit.

This is not a scoring rubric where partnerships must "pass" every dimension. Rather, it's a framework to make partnership trade-offs visible and intentional. Some partnerships may be strong on resident benefit but weak on financial reciprocity. Others may offer operational alignment but only limited structural change potential. The goal is an honest assessment of what the partnership offers and what it costs, and whether those trade-offs serve organizational mission and community priorities.

## CRITICAL CONSIDERATIONS

While this tool can be used to catalyze reflection, decision-making, and alignment of partnerships, it is important to take into account two key considerations before applying the tool to present situations.

These critical considerations help outline what external factors to keep in mind when weighing a potential partnership.

**Pressure to Rush into Partnership:** Partnership assessment requires real time investment, yet organizations often face pressure to commit quickly to secure funding or respond to opportunities. Research suggests that rushing partnership commitments often leads to misalignment being discovered too late, wasting more time than an upfront assessment would have required. The time to assess partnership may vary, but more important than time is the thoughtfulness and intentionality that organizations should give, through:

- Internal team discussion about capacity and fit with strategic priorities
- Conversations with potential partners about expectations, decision-making, and resource commitments
- Consultation with residents or community stakeholders about whether the partnership serves their priorities
- Financial analysis of partnership costs versus organizational benefits

**Alignment Feels Weak But Pressure Exists to Partner Anyway:** Organizations frequently face situations where partnership alignment feels inadequate, but external pressure to partner is intense. Common scenarios include:

- Funders requiring partnerships as grant conditions
- Larger anchor institutions seeking partnerships that primarily serve their own needs
- Board members pushing for partnerships without understanding operational implications
- Peer pressure when other organizations are partnering

In these situations, the Equity Fit Screen helps articulate specific alignment concerns. This enables more productive conversations with funders, partners, or boards about what would need to change for the partnership to work. Questions to consider when alignment feels weak:

- Can we negotiate different partnership terms that improve alignment?
- Is there a lighter-touch relationship that would work better than the proposed deep partnership?
- What specific resources or structural changes would make this partnership viable?
- Are there ways one or both partners can grow through the relationship?
- Are we being asked to partner because we're the best fit, or because we're available?
- If we decline this partnership, what relationships or opportunities might we lose, and is that acceptable?
- What's the cost of saying yes to a misaligned partnership versus the cost of saying no?

Organizations we studied emphasized that declining partnerships when alignment is weak often serves communities better than accepting partnerships that drain capacity without proportional benefit. However, this requires organizational confidence and financial stability that not all CBDOs have. When organizations feel they cannot decline partnerships due to resource constraints, documenting alignment concerns creates accountability and helps negotiate better terms.

THE SIX DIMENSIONS OF PARTNERSHIP ALIGNMENT

# 1. Resident Benefit First

Partnerships should directly improve outcomes for residents, not just improve organizational relationships or meet funder requirements. This dimension assesses whether the partnership genuinely serves community priorities or primarily serves institutional interests.

**Reflection Questions:**

- **Does the partnership improve access, stability, or wealth-building for residents?** Be specific about how residents will (or won't) benefit. Does the partnership reduce barriers to services, create pathways to economic opportunity, stabilize housing, or build community assets? Partnerships that primarily benefit institutions through data access, research opportunities, or organizational visibility without clearly benefiting residents should be questioned.
- **Are resident voices integrated into partnership design and accountability?** How will residents shape what the partnership does and evaluate whether it's working? Partnerships designed entirely by institutions without resident input often miss what communities actually need. Consider: Are residents involved in planning partnership activities? Do residents have power to change the partnership's direction if it's not working? Are residents compensated for their time and expertise in partnership governance?
- **Does the partnership respond to community-identified priorities or funder-identified priorities?** Be honest about whose priorities are driving the partnership. If the partnership emerged primarily from funding opportunities rather than community needs, it may not serve residents first regardless of good intentions.

**Warning Signs:**

- Partnership benefits are articulated in abstract terms ("building community capacity") without specific resident outcomes
- Partnership design happened without consulting the residents who will be affected
- Partners cannot clearly explain how residents will be better off through this collaboration
- Residents have advisory roles but no decision-making power in partnership governance

## 2. Accessibility & Wraparound Integration

Strong partnerships reduce the barriers that residents face. This dimension assesses whether the partnership makes it easier for residents to access needed support or adds complexity to service navigation.

**Reflection Questions:**

- **Does the partnership reduce barriers like inadequate or nonexistent childcare and transportation, lack of language access, or health needs?** Consider whether the partnership addresses known barriers residents face or simply adds services without removing obstacles to accessing them. Partnerships that bring complementary services together can reduce the burden on residents to navigate multiple systems. Consider: Does the partnership enable residents to access multiple supports in one location? Does it provide wraparound services (like childcare during job training) that remove participation barriers? Does it reduce paperwork or eligibility confusion by coordinating across programs?
- **Does it bring services closer to where residents already are, or does it require residents to travel to new locations?** Partnerships work better when they meet residents where they are rather than requiring them to navigate to unfamiliar institutions or neighborhoods. Consider: Can partnership activities happen in trusted community spaces? Does the partnership reduce travel burdens on residents? For residents with limited mobility or transportation challenges, is the partnership accessible?
- **Does the partnership enable better coordination across the services a family receives?** When multiple organizations serve the same residents, coordination can reduce duplication, identify gaps, and provide more holistic support. Consider: Does the partnership include mechanisms for sharing information about families served (with appropriate consent)? Will staff across organizations know when they're serving the same families and be able to coordinate support? Does the partnership help identify families falling through gaps?
- **Does the partnership create new administrative burdens for residents?** Sometimes partnerships intended to help residents actually create more complexity. Consider: Does the partnership require residents to navigate new eligibility processes? Does it create conflicting requirements across programs? Does it add reporting or documentation burdens?

**Warning Signs:**

- Partnership adds services without addressing barriers that prevent residents from accessing existing services
- Partnership requires residents to travel to new, less accessible locations
- Partnership creates new coordination complexity for residents rather than reducing it
- Enthusiasm about service integration is not matched by plans for how coordination will actually work

## 3. Operational & Financial Reciprocity

Partnerships require real resources: staff time for coordination, reporting to demonstrate partnership success, and overhead costs for relationship management. This dimension assesses whether partnership costs and benefits are equitably distributed or whether some partners shoulder disproportionate burdens.

**Reflection Questions:**

- **Are partnership costs (staff time, reporting requirements, coordination overhead) equitably covered?** Estimate the actual costs of partnership participation: staff hours for meetings, time for joint planning, reporting required to document partnership, coordination between organizations. Are these costs covered by dedicated partnership funding, or are organizations expected to absorb them? If costs are unequally distributed, is there clear justification (e.g., larger organizations may appropriately handle more coordination if they have dedicated capacity)?
- **Are benefits mutual, not one-sided?** What does each partner gain from collaboration? Healthy partnerships involve clear value exchange. Weaker partnerships involve one partner primarily serving another's needs. Be specific: Does the partnership help each organization advance their mission? Does it strengthen each organization's relationships with funders or community? Does it build capacity or expertise? If benefits flow primarily in one direction, the partnership may not be sustainable.
- **Can our organization sustain the partnership participation level expected?** Be realistic about whether you have capacity to deliver what partners expect. Partnerships fail because one or both partners committed to participation levels they couldn't sustain. Consider: Do we have dedicated staff capacity for coordination, or will this fall on already-overwhelmed team members? Can we maintain this participation level if a key staff person leaves? What will we have to stop doing to make room for this partnership?
- **If the partnership requires our organization to provide more than we receive, is there a clear mission-based justification?** This is not a one-size-fits-all approach. There are cases where the balance of responsibilities, funding, or benefits won't be equal. Ask: Why will this partnership benefit us and our mission despite an unequal footing?

**Warning Signs:**

- Partnership costs are described as "minimal" or "just attending meetings" without examining real-time investment
- Larger partners assume smaller organizations can absorb partnership costs because "it's not much"
- Benefits articulated for one partner are much clearer than benefits for other partners
- Partnership timeline and participation expectations were set without consulting all partners about their capacity

# 4. Cultural & Mission Alignment

Partnerships function best when organizations share core values and complementary missions. This dimension assesses whether partners have compatible organizational cultures and whether the partnership reinforces rather than dilutes each CBDO's mission focus.

**Reflection Questions:**

- **Does the partner share equity and racial justice values, not just in rhetoric but in practice?** Look beyond mission statements to actual organizational practice. Consider: What is the racial composition of a partner's leadership and board? How does the partner compensate leadership and make decisions? Does the partner have a track record of authentic community accountability? Organizations with fundamentally different equity commitments will struggle to partner effectively even when programmatic alignment seems strong.
- **Does the collaboration reinforce the CBDO's mission and holistic vision, or does it pull it toward fragmented service delivery?** Partnerships should strengthen organizational mission, not dilute it. Consider: Does this partnership help us deliver on our theory of change about how communities achieve stability and economic opportunity? Does it enable more integrated service delivery, or does it push toward siloed interventions? If the partnership requires compromising core values or approaches, it may not be worth pursuing.
- **Are decision-making processes and organizational cultures compatible enough to enable effective collaboration?** Organizations have different cultures around decision speed, risk tolerance, communication styles, and planning horizons. Significant cultural differences can make partnership difficult even when mission alignment seems strong. Consider: Does the partner make decisions at a pace compatible with our processes? Do communication styles match well enough to avoid constant misunderstanding? Can both organizations live with the inevitable compromises partnership requires?
- **Does the partnership advance our long-term strategic priorities, or is it a short-term opportunistic response to available funding?** Be honest about whether the partnership emerged from strategic planning or from chasing funding. Partnerships driven primarily by funding availability often don't survive beyond the grant period and can distract from strategic priorities.

**Warning Signs:**

- Partner's equity values are articulated in mission statement but not evident in leadership demographics, decision-making, or community relationships
- Partnership would require the CBDO to adopt approaches that contradict their theory of change
- Significant cultural differences around decision-making have already created friction in early partnership conversations
- Partnership emerged primarily from funding opportunity rather than strategic planning

# 5. Data & Learning

Partnerships should generate learning about what works and contribute to field knowledge about equity-centered approaches. This dimension assesses whether the partnership includes mechanisms for tracking outcomes, sharing data, and improving practice.

**Reflection Questions:**

- **Can outcomes be tracked and data shared transparently among partners?** Consider whether partners have compatible data systems and willingness to share information. Effective partnerships require the ability to track families across services, identify gaps, and understand whether interventions work. Consider: Do partners have data infrastructure to track partnership outcomes? Are partners willing to share data in ways that enable learning? Are there clear protocols for data sharing that respect privacy while enabling coordination?
- **Does the partnership contribute to equity learning and improvement, not just service delivery?** Strong partnerships generate insights about what enables families to achieve stability and economic mobility. Consider: Does the partnership include regular reflection on what's working and what's not? Are partners willing to adjust approaches based on learning? Does the partnership contribute to broader field knowledge about equity-centered community development?
- **Are there mechanisms for resident feedback on partnership effectiveness?** Partnerships should include ways for residents to share whether the collaboration actually helps them. Consider: How will residents provide feedback on whether the partnership works from their perspective? Will that feedback shape partnership decisions? Are residents compensated for the time they spend providing feedback?
- **What happens to data and learning if the partnership ends?** Consider whether learning from the partnership will be captured and accessible beyond the specific collaboration. This matters for both organizational learning and field knowledge.

**Warning Signs:**

- Partners have incompatible data systems and no plan for integration or coordination
- Partnership includes vague commitments to "collect data" without specific plans for what data, how, and how it will inform decision-making
- No clear mechanisms exist for residents to provide feedback on partnership effectiveness
- Partners seem more interested in generating data for reports than in using data for learning and improvement

# 6. Policy & Structural Change Potential

The most powerful partnerships don't just deliver services more efficiently but work to change systems that create barriers for residents. This dimension assesses whether the partnership includes potential for advocacy and structural change.

**Reflection Questions:**

- **Does the collaboration help shift systems (such as housing policy, benefit cliffs, funding formulas, employment practices)?** Consider whether the partnership creates opportunities to address root causes of challenges residents face, not just symptoms. Strong partnerships generate insights from service delivery that inform advocacy for policy change. Consider: Does the partnership identify specific policy barriers that harm residents? Do partners have an appetite for advocacy to address those barriers? Does the partnership create political power through collective voice that individual organizations lack?
- **Is there an advocacy pathway linked to the partnership, or is it limited to service delivery?** Be explicit about whether the partnership includes mechanisms to translate service delivery insights into policy advocacy. Consider: Do partners share commitment to policy advocacy as essential to their work? Are there clear processes for how the partnership will engage in advocacy? Do partners understand and accept the risks that advocacy can create with funders or government?
- **Does the partnership build community power and resident leadership, not just organizational relationships?** Partnerships advancing equity should strengthen residents' collective power to shape decisions affecting their communities. Consider: Does the partnership include mechanisms for resident leadership development? Does it support community organizing? Does it strengthen residents' relationships with one another and their ability to advocate collectively?
- **Can the partnership navigate the tension between receiving government funding and challenging government policy?** Many CBDOs depend on government funding while also needing to advocate for government policy changes. Partnerships should enable rather than constrain this advocacy. Consider: Do partners share understanding of how to navigate advocacy while maintaining funding relationships? Can the partnership provide political cover for advocacy through collective voice? Are partners willing to take calculated risks for policy change?

**Warning Signs:**

- Partnership focuses exclusively on service delivery with no attention to structural barriers
- Partners are unwilling to engage in policy advocacy due to concerns about funding relationships
- Partnership rhetoric includes language about "systems change" without specific strategies for how to achieve it
- Partnership reinforces rather than challenges existing power dynamics between institutions and communities

# Using the Equity Fit Screen: A Process Guide

### STEP 1: INITIAL ASSESSMENT (1–2 HOURS)

Convene the team members who would be involved in the partnership. Walk through each dimension and its reflection questions. For each dimension, rate alignment on a simple scale:

- **Strong Alignment:** Partnership clearly meets this dimension, with evidence to support assessment
- **Moderate Alignment:** Partnership partially meets this dimension, with some concerns or unknowns
- **Weak Alignment:** Partnership does not meet this dimension, or serious concerns exist
- **Unknown:** Insufficient information to assess this dimension

Document specific evidence or concerns for each rating. The goal is not to calculate an overall score but to make trade-offs visible.

### STEP 2: IDENTIFY CRITICAL GAPS AND INFORMATION NEEDS (30 MINUTES–1 HOUR)

Review dimensions rated as “Weak Alignment” or “Unknown.” For each:

- Is this dimension critical to our mission and values, or is it less essential for this particular partnership?
- If critical, what specific changes would improve alignment?
- If unknown, what information do we need to assess alignment?
- Who do we need to talk with (potential partners, residents, funders) to get that information?

This step often reveals that partnerships rushed into being due to funding deadlines lack basic information needed to assess fit.

### STEP 3: DEEPER PARTNERSHIP CONVERSATION (1–2 WEEKS)

Before committing, have explicit conversations with potential partners about dimensions where alignment is unclear or weak. Questions to discuss:

- How does each organization understand partnership goals and expected outcomes?
- What resources (staff time, funding, infrastructure) will each organization contribute?
- How will decisions be made when partners disagree?
- What mechanisms will ensure resident voice in partnership direction?

- How will costs and benefits be distributed?
- What happens if the partnership isn't working? How would we adjust or end it?

Organizations described these conversations as essential but often skipped due to time pressure. Yet partnerships that skipped alignment conversations almost always encountered problems later that took more time to resolve than upfront discussion would have required.

## STEP 4: RESIDENT CONSULTATION (ONGOING)

For partnerships significantly affecting service delivery, consult with residents about whether the partnership serves their priorities. This doesn't require formal surveys but should include mechanisms for residents to provide input. Consider:

- Discussing the partnership at existing resident gatherings
- Asking residents currently receiving services about whether the partnership would help them
- Including resident representatives in partnership planning conversations

## STEP 5: DECISION-MAKING

Bring the team back together to review what you've learned through deeper assessment. Make the partnership decision explicit:

- **Proceed:** Alignment is strong enough to move forward. Document any concerns to monitor as partnership develops.
- **Negotiate:** Alignment has significant gaps, but partnership could work with changes. Articulate specific changes needed and whether potential partners are willing to make them.
- **Decline:** Alignment is too weak, and changes that would make it work are not feasible. Declining may feel risky, but pursuing misaligned partnerships often harms the organization and community more than declining them would.
- **Defer:** Partnership has potential but requires more assessment or organizational capacity development before proceeding.

## STEP 6: MONITORING (ONGOING)

For partnerships you proceed with, revisit the Equity Fit Screen as needed to determine if fit is still working. Partnerships evolve as circumstances change, funding shifts, or staff turns over. Regular reassessment helps identify when adjustments are needed before partnerships deteriorate.

# Conclusion

The Equity Fit Screen provides a structured approach to partnership assessment that makes trade-offs visible and decisions intentional. It recognizes that partnerships require real resources and that pursuing misaligned partnerships can harm organizations and communities more than declining them would.

The tool acknowledges that organizations face very real pressure to partner even when alignment is weak, particularly when declining a partnership risks funding loss or relationship damage. In these situations, the Screen helps articulate specific alignment concerns rather than vague discomfort, enabling more productive negotiation about what would make partnerships work.

Most importantly, the Screen centers resident benefit as the primary purpose of the partnership. Partnerships that primarily serve institutional interests, funder requirements, or organizational convenience should be questioned regardless of other alignment factors. CBDOs exist to build community power and economic opportunity for residents. Partnerships should advance that purpose or they're not worth pursuing.