

## Assessment Analysis Guide

Info area	Analysis
Mission	Missions should be similar or have some overlap.
Target Population(s)	Commitment to serve a similar target population
Location	Consider access to services, especially if service integration will be part of the partnership. Partners should be accessible to one other for staff and clients.
Direct Service Staffing	<ul style="list-style-type: none"> <li>● <b>Structure:</b> This helps understand who would be interacting with the target population most – are there similarities in your structures? Are there key differences that could be of value or are potential issues?</li> <li>● <b>Roles:</b> There may already be overlap between supportive housing providers and Health Center Program Grantees with the following positions: <ul style="list-style-type: none"> <li>○ Practitioner or physician who delivers medical care to residents</li> <li>○ Licensed clinical social worker who provides directly or links to mental health and substance use services</li> <li>○ Medical assistant that provides medical support services (can factor into FQHC rate)</li> <li>○ Benefits specialist who enrolls participants in Medicaid/Medi-Cal</li> </ul> </li> </ul>
Approval/Decision Making Process & Key staff	Who are the key staff at each organization that would make decisions related to this partnership? Are they in the room now? The partnership should have leadership participation from both organizations.
Top 3-5 Organizational Goals or Priorities	The top priorities at each organization should be similar in some way, or a health/housing partnership should fall in line with these priorities
This is what we do BEST:	The strengths of each organization should be complementary
Committed to prioritizing homeless and chronically homeless individuals?	Beyond target population, there should be a commitment specifically for prioritizing homeless and chronically homeless people. A bad fit would be partners who do not want to “deal with” this population.
Array of services offered	Do partners offer a narrow or wide array of services? It may be challenging for those that offer very narrow services with no other partners to forge this new partnership, as there will be a learning curve.
Services	
Mental Health	
Medical Health	
Substance Abuse Services	
Other Services	<ul style="list-style-type: none"> <li>● Figure out <b>service gaps</b>, between the organizations</li> <li>● Note any <b>similar partners/referrals</b> that exist</li> <li>● Look for <b>common access points</b> for clients into these services. Are there common barriers to access? How can these be overcome together?</li> <li>● Are there specific <b>funding restrictions</b>? If so, what are they? How could each partner help meet these restrictions? Would any restrictions hinder partnering? How can these be addressed?</li> <li>● How can each organization bring <b>value</b> to the service gaps and needs of the other?</li> <li>● <b>Client engagement strategies:</b> How are they similar? How do they differ?</li> </ul>
Data	<ul style="list-style-type: none"> <li>● What are the client data needed for services at each partner site? Is there a lot of data overlap?</li> <li>● Determine which data is shareable. What are the data restrictions? Which organization(s) has the least restrictions?</li> <li>● Does either organization have experience sharing data with other organizations? Any experience in data sharing agreements or client information releases?</li> </ul>
Partnership Readiness	<ul style="list-style-type: none"> <li>● It is helpful if either or both organizations have experience with partnerships or collaborations in the community. If this is the case, who are the similar partners? What were lessons learned? What worked and why?</li> </ul>

	<ul style="list-style-type: none"> <li>• Both/all organizations should have staff that would commit to this partnership, with representation on both sides by leadership</li> <li>• Who would drive this partnership at each organization? How easy is it for them to make decisions and make things happen?</li> <li>• What are the hesitations to partner on either side, if any? How can these be addressed together?</li> <li>• The partnership goals should be similar if not the same</li> <li>• Staff members would follow directives from project managers who may be from the partner organization, are willing to learn about their partners and could take on new work</li> <li>• Staff are willing to integrate new practices that improve health outcomes for the target population</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• Start with any organizational funding restrictions that may apply to a partnership with the organizations in question. How might partnering actually help meet these requirements?</li> <li>• Are there any funding opportunities that you could pursue as partners?</li> <li>• How would Medicaid funding impact this partnership? How would partnership meet these requirements? Would partnering result in additional funding for either partner?</li> </ul>
<b>Innovation</b>	<ul style="list-style-type: none"> <li>• Do partners match up in terms of their culture of risk? For example, a risk-averse partner may be too cautious or may be constrained by regulations that move more slowly for a risk-taking organization.</li> <li>• Are all partners innovators/early adopters in the community? There is not a very long history of these types of partnerships, so success may involve navigating ambiguity.</li> <li>• Have both organizations thought about how this partnership would fit in with the health/housing landscape as it develops in the future? Who else could be included in this partnership in the future?</li> </ul>
<b>Bottom Line</b>	<ul style="list-style-type: none"> <li>• <b>The value each of us can provide is complementary and fills service/resource gaps. There is equal value and effort.</b></li> <li>• <b>We enjoy working with one another and are equally engaged in discussions and planning.</b></li> <li>• <b>It's possible to back out if it's not a fit. The impacts to clients and funding resources are not too severe.</b></li> </ul>