TOOL 1:
Partnership Checklist

What is the Partnership Checklist? The Partnership Checklist was designed to assist organizations in determining if a partnership is necessary to achieve the outcomes desired for the integration program.

Outcomes: Organizations using the partnership checklist will be able to:

- Identify if they need a partner to pursue integration
- Examine core elements in selecting a potential partner
- Identify their strengths and weaknesses in a partnership
- Identify potential partners for integration

Best Way to Use the Partnership Checklist: The Partnership Checklist is designed as a discussion guide for team based projects to use in determining if the partnership model is the best choice for organizational integration efforts. Through discussion, senior leadership teams, special integration discussion teams or multi-organizational planning teams review each element and identify strengths, weaknesses and needs for successful integration efforts. Each task can be discussed and/or assignments can be made for individuals to complete and bring the information back to the group for discussion. The key element is: this is not a task that should be assigned to one person – it's a group task within and/or across organizations.

The Partnership Checklist: Discussion Guide/Comments/Tasks

- [ ] Within the full array of primary and behavioral health services (e.g., types of services, levels of care), list the services that your organization already provides. Then, list the services that are needed but not provided, or provided only to a limited degree (e.g., a large behavioral health organization provides a range of mental health and substance abuse services, but would like to include primary care services for those without a primary care doctor).

- [ ] Identify all potential community provider partners that offer the services on your list.

- [ ] Prioritize potential partners that share your agency's mission, vision, and values, including those that focus on helping the neediest members of your community.

- [ ] **If you do not recognize an obvious partner, identify where your customers currently receive those services. In a community with no community health clinic or FQHC, ask the people you serve where they receive primary care. The providers identified may be your best potential partners. Also consider the following:**

If my organization offers assistance, can we actually deliver? For example, as a behavioral health organization offering to provide collaborative services to a potential partner, do we have a mechanism for providing timely access to consultation requests and referrals? If we are a primary health partner offering to provide collaborative services to a behavioral health provider, are we prepared to welcome and engage individuals who present for health services and have signs and symptoms of a behavioral health problem?

If we cannot currently deliver on what we would like to offer, are we willing to acknowledge our limitations and commit to working transparently to improve in order to better meet the our partner's needs?

Before approaching any potential partner, consider the following:

- Is my organization providing services that a partner might perceive as a competitive threat? If so, are we prepared to be a supportive partner rather than a competitor?
- What is my organization prepared to offer a potential partner? What is my organization's business case? Rather than asking what a partner can do for you, think about what they may need and express willingness to help them. The core value elements of a viable partner's business case suggests an organization should have:
  - Timely and cost effective access to collaborative treatment, including curbside consultation
  - Efficient service capacity (i.e., providing high quality services at the lowest possible cost)
  - Electronic health record capacity to connect with other providers and electronically transmit important clinical data
  - Ability to focus on episodic care needs and treat to target models
  - Ability and willingness to participate in bundled/shared risk payment models.
  - Outcomes that demonstrate that the organization can:
    - Engage the people it serves in natural support networks
    - Help individuals self-manage their whole health, wellness, and recovery
    - Reduce the need for emergency and high cost services for complex populations

- [ ] **When approaching a potential partner, identify small outcomes for the initial meetings. It may take several meetings to get to know one another. Remain focused on how your organization will provide value to your partner before focusing on how the partner will meet your needs. Consider job shadowing to gain perspective on how your potential partner operates day-to-day.**

- [ ] **Read and review this toolkit together as an initial partnership-building activity. The toolkit can start a valuable conversation about how much change is needed and how you can begin to help one another provide better services.**

Do I need a partner to complete the rest of the tools in the OATI?

- If you do not currently have a partner, you can use this toolkit to progress the integrated services you already provide. This will position you as a better partner in the future.
- If you have a partnership, use the toolkit internally to perform a self-assessment and develop improvement plans within your own organization and externally to perform a collaborative self-assessment and develop collaborative improvement plans.
- If you are just beginning a partnership or are in early conversations with a potential partner, the toolkit can point to partnership-building activities to enhance openness and trust and identify starting points for collaboration.