



Lead Partner Self Assessment

aka: Do I have the 'right stuff'?

The items below describe competencies, skills and practices which Lead Partners (and their teams) bring to the party with Investees. There is no pass / fail nor grade with your ratings. Instead, your self-assessment opens up an ongoing dialogue to help consider any coaching, training or co-partnering you could use along the way.

Rating Scale

- o Good level of skill – I am comfortable here
- o My attention to this is ongoing as my skill is developing
- o Some focused feedback-coaching-training could be useful

Good Skill Level
Skill is Developing
Some Coaching Here

Skill	Behavioral description	Rating
Commitment	I have prioritized this work, such that I am prepared to commit my personal time, energy and focus to support a successful Investee engagement.	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Partnership	I bring an orientation to listening, learning, strong relationships, as well as willingness to roll up my sleeves to work side by side with the Investee.	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Managing Change	I understand the facilitators and obstacles to driving organizational change and can coach and influence Investee leaders to recognize opportunities and accelerate progress.	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Cultural Awareness	I am sensitive in the language I use and the respectful attitude I bring in working on issues related to poverty, underserved communities and non-dominant cultural practices which may be different from mine.	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Patience & Pacing	I appreciate Investee engagements proceed at various speeds such that I may have to adjust and slow down, revisit assumptions or accelerate to "get it done."	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Shepherd Resources	I can continually scan for and respond to additional Investee resource needs, e.g. SVP content experts, external strategic partnerships, etc. and take care to monitor those for "fit" as well as quality and impact.	<input type="radio"/> <input type="radio"/> <input type="radio"/>

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Skill	Behavioral description	Rating
Teamwork	I appreciate the importance of building and maintaining strong teamwork across my Partner Team, i.e. hold people accountable, acknowledge contributions and encourage team members to offer their “best” towards our collective efforts.	○ ○ ○
Sponsorship	I understand my role is to act as a champion, ally and ambassador for the Investee and will demonstrate my commitment by “showing up” and “being present” for them.	○ ○ ○
Passion	I can articulate the Investee’s vision and mission with passion and energy, both internally with the Investee as well as externally across the SVP network and beyond.	○ ○ ○
Planning	I can manage details, track progress and call out gaps consistent with our MOU, as well as support the Investee to create and implement actionable goals and objectives.	○ ○ ○
Strategic Thinking	I can be an effective thinking partner to help the Investee consider their “bigger picture” as well as balance and translate strategic thinking into operational plans.	○ ○ ○
Relationships	I understand the need to actively reach out, initiate action, ask hard questions and build trust across the Investee’s stakeholders.	○ ○ ○