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Planning for Partnership

What Successful Partnerships Do: A series of practical guides

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INTRODUCTION

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Working in partnership is a reality for many Ontario non-profit groups and organizations. Your organization may have few human or financial resources, be spread throughout the province or represent diverse communities. Working in partnership can enhance your ability to implement multi-faceted strategies to achieve your objectives.

This resource defines working in partnership and the various levels of working in partnership. It provides an overview of the essential requirements for putting a partnership in place and details some activities required for dynamic and effective partnerships.

This resource has been adapted from the original French version.

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WHAT IS A PARTNERSHIP?

It can be challenging to define partnership, as the essential nature of each partnership is defined by those who participate in it[1]. A common theme in many partnership definitions is "organizations/agencies coming together to work towards a shared goal or vision"[2].

Partnerships involve relationships between more than one person, group or organization. Often, each partner has different objectives, activities, resources and expectations about working in partnership[2].

Partnerships can also be defined by the interaction level between partners. The level or intensity of the partnership depends on its need, goal and purpose[1]. Himmelman's Collaborative Continuum (Figure 1) illustrates common levels of partnership, from networking to coordination to cooperation and, finally, to collaboration.
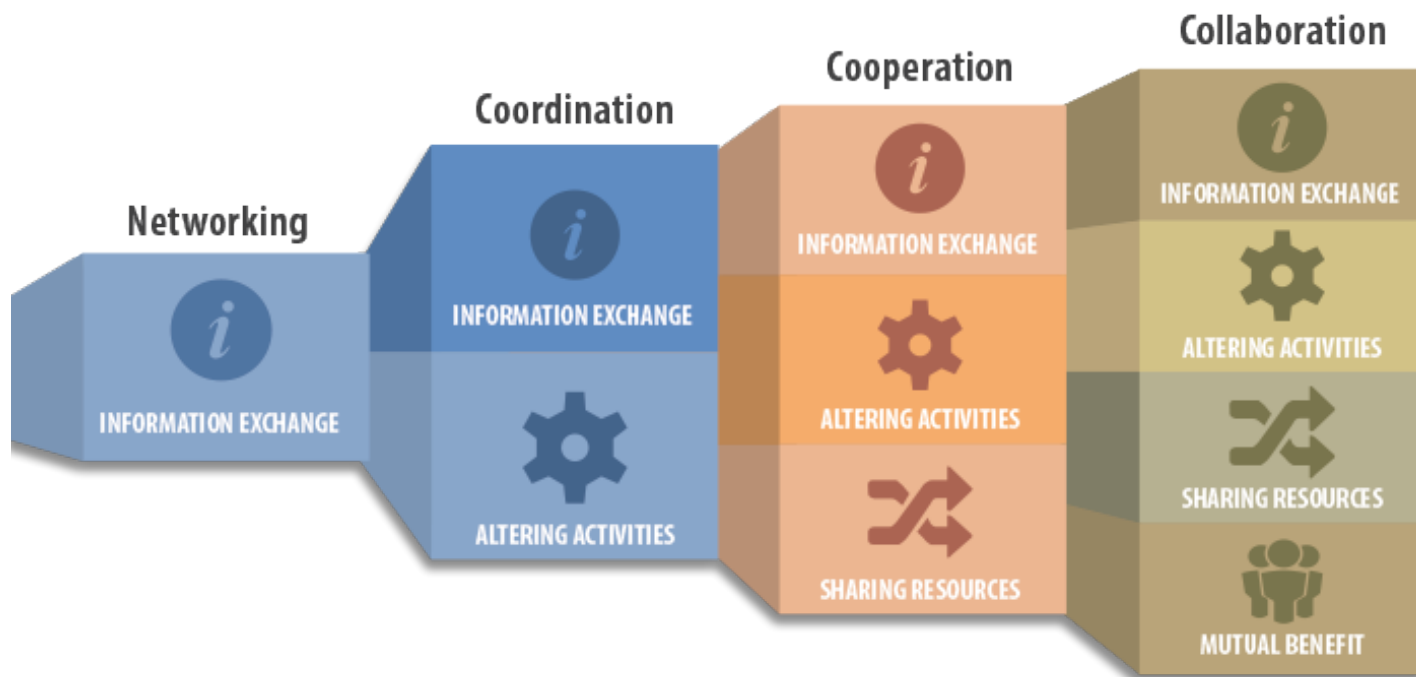

Figure 1: Himmelman's Collaborative Continuum (Source: Toolkit2Collaborate.ca)

These words – networking, coordination, cooperation and collaboration – are commonly used as if they were interchangeable. Partners in different sectors may use slightly different words to describe working together. What is most important is that your partners agree on the characteristics of your work together.

The table below summarizes the principal characteristics HC Link has found describe the two most common levels of partnership: coordination and collaboration.

*In general, **coordination** means…*	*In general, **collaboration** means…*
▸ The partnership focuses on a specific activity or short-term goal, often linked to increasing available services or reducing service duplication. ▸ Partners plan together. Work and resources (such as staff and budgets) are managed separately. ▸ Decisions are made by each organization after consulting with partners. Example: Agency A *coordinates* with Agency B to offer a series of workshops for Agency B's clients. Agency A provides the workshop facilitators, content and materials. Agency B provides the location and participants for the workshop.	▸ The partnership focuses on developing a new initiative or service together or on improving an existing initiative or service. This collaboration is often long-term and/or includes numerous phases and activities ▸ Partners plan together. Work and resources are negotiated and shared between partners. ▸ Project partners share in decision-making. Example: Agency A and Agency B are *collaborating* on a series of workshops to be offered to Agency B's clients. The agencies work together to develop the content and materials and to deliver the workshop series.

PLANNING FOR PARTNERSHIP

Building and sustaining a strong and effective partnership is an ongoing and often non-linear process. To prepare for working in partnership, HC Link recommends groups start with:

A reflective process

A reflective process, conducted as early as possible in the life of your partnership, will give you a clearer picture of what you want to achieve through the partnership as well as your ability to work in partnership. This applies whether or not you have already identified your partners and whether your new partnership is by choice or by direction (such as a funder's requirement).

Use these questions to guide your reflective process:

▸ What do we want to accomplish that would be better done in partnership?

▸ Thinking about our objectives, how would we like to work in partnership? Consider:

– Our vision, mission and values

– Our capacity and available resources (human resources, funding, skills and competencies, available time, other resources)

▸ What are the advantages for us if we work in partnership? What weaknesses could be lessened by working with partners?

▸ What could we offer to a partnership? What are our strengths?

▸ What do we need and expect from our partners?

This reflective process will prepare you to work in partnership and help you identify potential partners. Later, it can support the development of a concrete partnership agreement.

Engaging equity-seeking groups

Sometimes, organizations or people working with or representing equity-seeking or historically marginalized peoples are over-solicited to participate in partnerships. A reflective process will help these organizations or people decide which partnership requests to pursue and their level of participation in each. This ensures that they do not become overextended and are being engaged meaningfully rather than symbolically.

Partnership agreements

A partnership agreement captures the values, goals and objectives of your partnership and its ways of working. Once signed, it provides a legal framework for the partnership. Over the life of the partnership, reflection and evaluation activities may lead you to modify the partnership agreement. Ensure that the people with signing authority fully understand and accept the terms of the agreement prior to signing, especially if they did not draft the agreement themselves.

SIX ACTIVITIES FOR SUCCESSFUL PARTNERSHIPS

Dynamic and effective community partnerships practice these six activities[3], each partnership in its own unique way. Whether you are forming a new partnership or maintaining an existing one, these activities are equally relevant. They do not typically happen in a neat, distinct order; the activities will – and should – overlap regularly over the life of a partnership.

1. Connect

During your reflective process, you began to think about who your partners might be. Talk to existing partners and check community directories and the Internet to learn about potential new connections. Tools such as asset mapping[4], network mapping[5], the Stakeholder Wheel[6] and the Equity Analysis of Group Membership template[7] can identify gaps, priority groups and people for outreach, including those outside your sector and beyond those you typically work with.

Consider:

▸ Organizations, people and community groups outside your sector that also work with your target populations

▸ Organizations and people who are members of regional or topic-based networks and committees, such as planning tables and roundtables

▸ Organizations similar to yours that are located in a different geographic region. (Do not be discouraged by distance; technology and strong partnership links can help overcome this complication.)

▸ Private businesses and Chambers of Commerce

Figure 2: Six activities for successful partnerships
(Source: What Successful Partnerships Do: 6 key activities. HC Link, 2017.)

Take the time to know and understand the organizations and people you are approaching. This relationship-building ensures trust, compatibility and, ultimately, the productivity of your partnership. Always reflect before you connect with new partners: be clear about your own organizational priorities, positioning and history in relation to the people you are trying to connect with.

Connecting with partners is not a "one-off" activity; you may need to reconnect with existing partners or connect to new partners at different times.

Engaging the right partner at the right time

On a practical level, a partnership operates between the people who represent the organizations in the partnership. It is therefore critical to connect with the right people at the right time.

Consider the level of participation for each organization; it is not always possible – or necessary – for all of the partners to commit at the same level of participation. The Stakeholder Wheel[6] may be helpful here. Additional questions to ask about connecting with partners:

- ▸ Who should participate in the reflective process?
- ▸ At what point will the person who will actively represent the organization be included in the partnership planning process?
- ▸ What steps can the organization and partnership take to facilitate smooth transitions and continuity in the partnership when there are planned or unplanned changes in the people involved?

2. Foster shared understanding

Partners need to get to know one another and build a shared understanding of each other's perspectives and priorities. You may spend a great deal of time at the beginning of a partnership creating this understanding. Returning later to discuss the purpose of the partnership and its value for each partner is also important. Helpful tools include story sharing, ice breakers and meeting check-ins and checkouts. These also support evaluation activities.

Openness and curiosity in the face of conflict will nurture shared understanding. Refer to Bruce Tuckman's famous 1965 stages of group development *Forming, Storming, Norming* and *Performing*[8]. A fifth stage, *Adjourning*, was added later[9]. These stages apply to the partnership as a whole and also to the engagement of new partners within an existing partnership.

3. Create a shared vision

Collaborations often attract members with similar or common interests. Sometimes we assume that our partners share a common vision[1] without taking the time to agree on why and how we are working together and what we want to accomplish. Creating a shared vision requires seeking common ground between all people and organizations in the partnership. This shared vision will be a touchstone for the partnership whenever you plan collaboratively.

A vision statement communicates a partnership's desired future – one that is achievable and which stretches the partnership beyond its current state ("in ten years, we would like to see….")[10]. The vision statement articulates what the group is about and should unite and inspire the partnership. Everyone should see themselves in the vision.

Tools that can help a partnership develop a vision include Paper Quilt, found in HC Link's Introduction to participatory evaluation techniques[11], and 1-2-4-all, which is described in HC Link's Facilitation for Healthy Communities Toolkit[12].

4. Plan collaboratively

Once you have a shared vision of what the partnership will accomplish, you can begin to develop a strategic plan or workplan for the partnership. Planning in partnership establishes a common language and culture for the life of the partnership. Planning happens at the beginning of a partnership and often recurs in conjunction with evaluation and renewal activities.

Collaborative and inclusive leadership is critical. HC Link recommends using participatory approaches and visual approaches to planning. Avoid (or define) jargon to ensure that all views are heard and understood.
Planning is crucial. However, your partnership needs to balance adequate planning and spending all of its time in meetings[1]!

5. Work together for change

Collective action is the glue that bonds many partnerships. Effective meetings are key to keeping up the momentum and keeping track of workplan status. Clear and ongoing documentation of the status of workplan activities will help people stay informed during busy times. For action-focussed partnerships, solid preparation and follow-up will make meetings worth everyone's time and effort.

Including small appreciation activities within meetings can enliven your work together.

6. Celebrate, evaluate and renew

Sustaining and improving your partnership requires monitoring, measurement and evaluation of both your activities and your processes. Participatory tools can reap great benefits for partnerships without the resources to hire an outside evaluator.

Questions you could use for a process evaluation:

- In what ways does our work match the ways we hoped to work together?
- In what ways are we on target to meeting our overall goal(s)? What lies in the way?
- To what extent are partners feeling engaged and committed to our work together?
- What could improve each partner's connection to our work?
- When has our decision-making been most inclusive? How can we improve?
- How is our partnership using evidence to develop our activities?

PARTING WORDS

A successful partnership is a process, not a destination. Partnerships move and change and must be continually nurtured – it takes work and time and it is not always easy.

But working in partnership allows us to accomplish far more than we can do alone. It has many advantages: more people to share the work, more heads to think and plan, more capacity for a stronger impact and a greater reach[13].

Tending to each of these activities will increase your partnership's chance of success. Good luck!

TOOLS FOR DEVELOPING EFFECTIVE PARTNERSHIPS

Partnership Development Resources *HC Link*
This section on HC Link's website has many resources to help you and your partnership get established, find an appropriate structure and work effectively. Additional resources on participatory evaluation and measuring partnership effectiveness are in the Evaluation Resources section. Our Facilitation Toolkit lists several techniques that may be helpful for guiding group conversations or meetings with partners.

Public Health & Primary Care Collaboration Toolkit *McMaster University*
The online toolkit contains resources, information and tools for working collaboratively with any sector. This section contains Himmelman's Continuum of Collaboration and gives explanations and examples for each level.

Stakeholder Engagement Wheel *Tamarack*
This resource provides an exercise description and examples on how you can use the Stakeholder Wheel to map out who should (or could) be involved in your partnership and at what level.

Collaborative Leadership in Practice (CLiP) *Health Nexus & Ontario Public Health Association*
The aim of the CLiP project is to equip leaders to be able to collaborate with diverse partners and recognize the power structures that exist in partnerships. On the resources page there are two excellent tools (with guides for their use): "Equity Analysis Tool of Group Membership" and a "Partnership Conversation Starter," which has definitions and examples of different models of collaborative work.

Seven Questions to Knowing your Audience *Nancy Duarte*
These questions can be very useful in determining the needs and wants of potential partners -- before you approach them. The questions provide a way to think from the perspective of potential partners and to tailor your approach to them in a way that will lead to a Yes.

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HC Link helps community groups, organizations, and partnerships drive change by providing consulting services, webinars, workshops, resources and other learning opportunities in both English and French. We provide groups with expertise in a wide range of healthy community topics and health promotion approaches. Our services are funded by the Government of Ontario and are provided free of charge where possible.

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