

Community Development Toolkit

Partnership Development: Tools and Techniques

A Project of Central Region Community of Practice – Community Development

March 2012

Tool #1. Why Do You Want to Partner? Checklist

I want to partner in order to:

- Acquire additional resources (staff, space or equipment) to carry out an initiative.
- Be more efficient and avoid duplication or overlap in providing services.
- Be able to serve the same clients or customers more effectively.
- To learn from others or to mentor others.
- Act as a more forceful lobby or advocate and attract the support needed.
- Deliver a more comprehensive service that could not be done alone.
- Strengthen my organization.
- Gain greater profile in the community.
- Enable the continuation of a project -- ensure its sustainability.
- Meet funding criteria that require collaboration with other stakeholders.
- Other reasons, such as: _____

Source: Collaboration Roundtable, *The Partnership Toolkit: Tools for Building and Sustaining Partnerships*. (Victoria: BC Ministry of Community Development, Cooperatives and Volunteers and Community Liaison Division, 2001), accessed March 20th 2012, http://www.pcrs.ca/uploads/7L/A/7L_ATXdmJI3bp9lgOtVTKA/partnershiptoolkit.pdf

Tool #2. Are You Ready to Partner? A Self-Assessment Tool

Before entering into a partnership, it is important to evaluate whether your own organization is ready to partner. The self-assessment tool identified below will assist you to identify if you are ready, as an organization, to enter into a partnership.

- A **Yes** next to the item indicates a readiness to partner.
- A **No** shows that you may experience difficulties in partnering.

The aim is to have more “yes” than “no” answers before you begin to partner.

Question	Yes	No
Do you have the support of your board, management and staff for partnering?		
Has your organization examined alternatives to achieve your objectives?		
Does your organization value working with other organizations and groups?		
Does your organization have an acceptable method of resolving conflicts or issues?		
Is your organization able to communicate effectively?		
Do you have someone who can represent the organization in the process of identifying and entering into a partnership? Can this person be spared and will he/she be supported by the organization?		
Is your organization prepared to devote the resources necessary for the partnership (time of staff and volunteers, money, space and equipment, etc.)?		
Does your organization have skills that it can use in the partnership? Identify what your organization has to offer the partnership.		
Are there any 'red flags'?		
Identify what you may need to watch out for.		
Is your organization prepared to share decision-making authority with or give up some decision-making authority to another organization?		

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Tool #3. What Kind of Partnership Do You Want?

Once your organization has identified that it is ready to partner, you need to carefully consider the type of partnership you would like to have.

You should ask the following questions:

- What tasks need to be performed by the partnership?
- How large are the tasks?
- Is it a single or simple task?
- Are there multiple and more complex tasks?
- What is the time limit on the partnership?
- Is it short-term?
- Is it meant to be a trial basis for a long-term partnership?
- Is more than one partner needed and why?
- Do you want to start small until you and your partner know each other better?
- How formal or informal is the partnership to be?
- What degree of coordination is required to accomplish the goals of the partnership?

Partnerships can vary widely in their degree of coordination from a loose cooperative arrangement to a total integrated model as in the following:

Examples of Three Partnership Models		
Cooperative Model	Collaborative Model	Integrated Model
<p>Each partner:</p> <ul style="list-style-type: none"> • Maintains its own decision-making responsibility • Remains autonomous • Retains own identity • Has own staff & budget • Has full responsibility for its actions 	<p>Each partner:</p> <ul style="list-style-type: none"> • Shares decision-making responsibility & authority • Has particular roles and responsibilities • Is accountable to the other • Contributes resources • Surrenders some measure of its autonomy 	<p>Each partner:</p> <ul style="list-style-type: none"> • Transfers decision-making authority to a new structure/new entity • Integrates its resources with other partners • Administers according to common policies and procedures • Surrenders a considerable amount of its autonomy
<p>Decision Making</p> <ul style="list-style-type: none"> • By consensus • Agreement not necessary in all cases 	<p>Decision Making</p> <ul style="list-style-type: none"> • By consensus • Agreement necessary 	<p>Decision Making</p> <ul style="list-style-type: none"> • By vote if necessary • Agreement necessary

Source: Collaboration Roundtable, *The Partnership Toolkit: Tools for Building and Sustaining Partnerships*. (Victoria: BC Ministry of Community Development, Cooperatives and Volunteers and Community Liaison Division, 2001), accessed March 20th 2012, http://www.pcrs.ca/uploads/7L/A/7L_ATXdmJI3bp9lgOtVTKA/partnershiptoolkit.pdf.

Tool #4. Selecting Partners

Having a good understanding of the kind of partnership you want and what your goals are will enable you to identify the kind of partner you need.

Develop a Partner Profile

This could include:

- Type of organization, e.g. government, volunteer-based, business/corporate
- Size of the organization
- Location of the organization
- Type of services it should be able to provide
- Type of experience it should have
- Types of strengths or skills it should have
- Financial stability and other resources it can provide
- Culture sensitivity
- List other desirable characteristics

How do you Identify New Partners?

It may be difficult to find partners, particularly if your organization is new to the community or you are not familiar with what other organizations have to offer. Cultural differences and language barriers may create obstacles to finding partners. Also, you may not have the time or resources needed to search for partners. The following provides a guide to assist you to identify new partners.

1. Develop an inventory of possible partners

Your partner profile will assist you in selecting the sector most relevant to your needs. For example:

- Government ministries—federal, provincial, municipal
- Service provider agencies
- Community volunteer-based organizations
- Consumer/advocacy groups
- Professional associations
- Educational institutions
- Businesses
- Others

To develop this list:

- Talk to people in your organization
- Consult with potential funders
- Obtain lists of government and community agencies/organizations
- Consult with key contacts/leaders in your community

2. Identify the potential role these partners could play

This could include:

- Funding
- Direct service delivery
- Staff resources
- Volunteers
- Other resources such as space, equipment
- Planning
- Management
- Coordination
- Other, specify

3. Identify whether the organization is or has been involved in other successful partnerships or collaboration.

- Obtaining information on the potential partner's experience and reputation in the community is critical.

4. Review available agency materials

- Obtain and review materials for each organization, such as annual reports, audited financial statements, organizational charts, descriptions of services or programs, location of offices, and other information available. This may be difficult or time consuming. It may be more beneficial to meet with the potential partner.

5. Arrange meeting or orientation session with potential partners.

- Set up a meeting to become acquainted with potential partners and to obtain more information. Ask to have an orientation session to see what their organizations do. Speak to staff and volunteers carrying out various functions within the organization.

6. Identify major pros and cons for partnering with each organization.

- From the information available up to this point, identify major pros and cons for partnering with each organization.

7. Consider all your findings and identify two or three organizations that have the highest potential for partnering.

Source: Collaboration Roundtable, *The Partnership Toolkit: Tools for Building and Sustaining Partnerships*. (Victoria: BC Ministry of Community Development, Cooperatives and Volunteers and Community Liaison Division, 2001), accessed March 20th 2012, http://www.pcrs.ca/uploads/7L/A/7L_ATXdmJI3bp9lgOtVTKA/partnershiptoolkit.pdf.

Tool #5. Building a Management and Decision- Making Process that Works for your Organization

In all likelihood the potential partners will need a special meeting to decide upon the appropriate management and decision-making model, and upon the best way to organize and manage the partnership.

1. Invite your potential partner to a planning meeting. Who will attend?

Invitees:

2. Who will chair this meeting: _____

3. Identify what benefits you expect to flow from the partnership, for clients and for your agencies.

4. Confirm that there is a basic understanding of why you are partnering.

Do we agree on the partnership's...	Partner 1		Partner 2		Funder	
	Yes	No	Yes	No	Yes	No
Vision and goal or purpose						
Intended objectives and outcomes						
Broad policies to guide the partnership						

5. Consider whether the funder will be involved as a partner and will be invited to participate in the management group.

6. Checklist: In order to manage the partnership effectively, each of the partner's management systems and approaches do not have to be identical, but they do have to be reasonably compatible. Are any problems anticipated with regard to the following? If so, what strategy will ensure compatibility?

Area of potential conflict	Are our policies compatible?		Compatibility Strategy: how will we ensure these do not become problems?
	Yes	No	
Hiring Policy			
Staff salary, benefits, holiday time and sick leave			
Staff supervision			
Staff meetings			
Collective agreements			
Role of volunteers			
Training			
Relationship between volunteers & staff			
Employment equity policies			
Commitment to cultural diversity and sensitivity			
Reporting lines			
Fiscal lines			
Financial reporting by staff and organization			
Use of equipment			
Other			

Source: Collaboration Roundtable, *The Partnership Toolkit: Tools for Building and Sustaining Partnerships*. (Victoria: BC Ministry of Community Development, Cooperatives and Volunteers and Community Liaison Division, 2001), accessed March 20th 2012, http://www.pcrs.ca/uploads/7L/A/7L_ATXdmJI3bp9lgOtVTKA/partnershiptoolkit.pdf.

Tool #6. Partnership Tips and Suggestions

Creating the following documents will not only allow you to visualize the characteristics of your partnership, it can also improve your partnering skills. These forms will also assist you in selecting a partner that will be suited to your needs and particular situation.

- Partnership checklist

Create a list of characteristics, traits, and goals that you desire in a partner. When you are searching for a partner, ask these questions and select the party that best fits your desired criteria.

- Coherence assessment

Allow each of the parties to assess each other's intentions, qualities, attitudes, and commitment to the partnership. Compose a document that illustrates your expectations of a partner, this will allow you to evaluate the possible partners standing in the relationship.

-Proposal and agreement form

This will allow your partner to see how serious you are and put their trust in you by agreeing to your proposal. This will also provide your partner with a clear outline of your intentions.

-Partnering roles and skills form

Create a document that details your skills and the skills of your partner so that you can visualize who is best at accomplishing what tasks. Once partner strengths are identified the parties can assign roles that will allow them to complete their project or task.

-Preparations for partnership conversations

Before meeting with a partner prepare the issue you need to address. This will make sure that any problems will be addressed and you will ensure that all of your concerns will be brought to your partner's attention. This will also show your partner that you are taking this relationship seriously and are willing to put in the effort to see that it works.

-Partnership review checklist

Create a list of criteria that you expect your partner to achieve and revisit this list continually during the partnership. This will allow reevaluation of the partnership and ensure all parties are contributing equally.

-Partnering case study

The best way to learn how to do something is by example. In order to improve your partnership you and your partner should review a case study of a similar partnership. This will provide suggestions and downfalls you and your partner can learn from in order to prevent conflict and improve.

-Budget lists

It is wise to keep a financial record of spending, costs, and expected costs. This will allow all parties to know how money is being spent and will ensure no one party is overspending.

Source: Ros Tennyson, *The Partnering Toolbook*. The Partnering Institute and The International Business Leaders, accessed March 22nd 2012,
http://tpi.iblf.org/publications/Toolbooks/The_Partnering_Toolbook.jsp

Tool #7. Identifying Favorable Partnership Traits

The following are some great personal characteristics you can adopt to ensure your partnership is a success. It is also important to seek partners that have the same traits.

- **Honesty:** Tell your partner what you want and expect from the relationship; be up front and truthful. Having all intentions on the table will ensure that all parties know what the other wants.
- **Transparency:** Do not have hidden agendas; keep everything open to ensure all parties feel well-informed and equal.
- **Respect:** Treat others, as you would like to be treated. This will create good will in the partnership and help you attract future partners.
- **Professionalism:** Maintaining a professional attitude will inspire confidence and ensure that things are done in the proper manner.
- **Readiness:** Having a readiness to work hard on the partnership will solidify your partner's trust in you.
- **Approachability:** Being approachable will encourage your partners to bring any problems to you. This will also encourage potential partners to take an interest in your project.
- **Open-mindedness:** Keeping an open mind shows a willingness to consider your partner's views. Also, you may find that some of your partner's suggestions may be of great value to your project.

Source: Church, K., *Moving Over: A Commentary on Power Sharing*. Toronto: Psychiatric Survivor Leadership Facilitation Program, 1993.



About this Community Development Toolkit

This community development toolkit was created by Colin Rose, Chris Parmenter and Kyle White, with editorial review by Kelly Vodden, Ahmed Khan and Gail Collins. The toolkit was created as part of a community-based research project undertaken by students in an undergraduate course at Memorial University, Department of Geography, instructed by Dr. Kelly Vodden (Geography 3350 – Community and Regional Planning and Development). The project was completed in partnership with the Central Region Community of Practice – Community Development. Using a 'Community of Practice' learning approach the project was intended to provide resources that introduce students and community development practitioners to several key community development and regional planning tools and concepts. The financial support provided by the Rural Secretariat-Executive Council and the support and participation of Regional Partnership Planners Linda Brett and Tanya Noble are gratefully acknowledged.