

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Target Filter for Partnership Development

Target Filter for Partnership Development Example						
Category	A=3		B=2		C=1	
Is there a clear and compelling need for this partnership?	High Need	5	Medium Need	3	Low Need	1
Is the potential partnership aligned with our mission and vision?	High Alignment	5	Medium Alignment	3	Low Alignment	1
Is someone else already doing something similar?	Low Replication	5	Medium Replication	3	High Replication	1
What is the potential impact of this partnership on our target audience of both partners?	High Impact	5	Medium Impact	3	Low Impact	1
How prepared are we to implement this partnership?	High Preparedness	5	Medium Preparedness	3	Low Preparedness	1
Is there a commitment from partner organizations to support the partnership?	High Commitment	5	Medium Commitment	3	Low Commitment	1
What is the cost to implement this partnership?	Low Cost	5	Medium Cost	3	High Cost	1
What is the revenue potential of this partnership?	High Potential	5	Medium Potential	3	Low Potential	1
TOTAL	40		24		8	

A score of 32-40 merits moving forward to pursue program development; discuss all yellow and red to ensure they are not deal-breakers.

A score of 24-31 requires further discussion and careful consideration before deciding whether or not to move forward.

A score below 24 is not worth pursuing at this time but can be revisited later.

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Using the Target Filter for Partnership Development

Target Filter for Partnership Development Template			
Category	A=5	B=3	C=1
Is there a clear and compelling need for this partnership? Is there a strong need/benefit of those receiving services? Does the community demonstrate a desire or need for the partnership? On what basis is the partnership being set up? Are there clearly identified goals that only a partnership arrangement could help achieve?			Reconsider partnership if a "1" is placed here. This is not easily "fixable"
Is the potential partnership aligned with our mission and vision? Is this partnership connected to your organization's strategic plan or priorities? To avoid mission drift, make sure that this potential partnership does not step outside of your current mission, vision and priorities.			Reconsider partnership if a "1" is placed here. This is not easily "fixable"
Is someone else already doing something similar? Do other organizations have similar or the same goals? If so, have you considered approaching them to become part of their partnership arrangement to ensure work is not being duplicated? If this is not appropriate or feasible, can you incorporate lessons they have learned into the new partnership arrangements.			Discuss whether there is still an unmet need, how would what you offer be different
What is the potential impact of this partnership on our target audience of both partners? Does this partnership have the potential to make significant change or only minimal impact? Are there organizational and collective benefits will be gained from setting up this partnership arrangement? Is there "added value" for potential partners?			This may be okay if it's an easy, low cost partnership.
How prepared are we to implement this partnership? Do we have the space, staff, technology, knowledge and resources needed to implement the partnership? If not, are they available?			How prepared are we to make changes needed to implement?
Is there a commitment from partner organizations to support the partnership? How deep is the commitment? Is there a group of like-minded people with a shared vision who have decided that developing a partnership is the only route to achieving a goal? Are potential partners and their leadership willing to support this? Are they willing to sign up to this?			Could this be fixed? Board approval? MOUs, Meeting to build consensus
What is the cost to implement this partnership? Is it going to require a significant amount of additional funding or resources to develop and manage this partnership?			This may be okay if funding is available.
What is the revenue potential of this partnership? How attractive might it be to funders? Do we have buy-in from stakeholders?			This may be ok, depending on the cost.
TOTAL			

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Brainstorm Potential Partners

Potential Partner List				
Types of Organization	Organization Name	Reason for Fit	Unanswered Questions	Alignment Rating (1-5)
Ex: Mentoring Organizations	Big Brothers, Big Sisters	Serving youth who are older than the kids we serve, possible continuum of services	Are there methods for easy referrals?	
	Starfish Initiative	Tutoring children, same service population, we could exchange services	Do they have capacity to serve our kids?	

*Rank each potential partner on a scale of 1-5 (5 being the strongest alignment) in the Alignment Rating

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Fact Finding Visit Agenda

Introductions & Front-End Expectations

- Introduce all members of the meeting and their roles within the organization. Arrange for a tour, if applicable. Explain that this is a fact-finding visit, you have a partnership idea to present and would like to brainstorm initial reactions, risks/benefits/concerns, and possible next steps. Ensure that you understand that this conversation may help determine that a partnership is not a good idea or is not a fit right now and that you are open to the outcomes either way.

Partnership Idea

- Explain the idea of partnership and make a preliminary case for why this particular organization would have something to contribute and how it would be able itself to benefit.

Initial Risks, Rewards & Concerns

- Brainstorm each initial party's risks, rewards, and concerns. It is important to be realistic about what the partnership is likely to be able to achieve and to be open about the challenges involved.

Time Frame and Next Steps

- If it was determined that the partnership was not a good idea at this time, determine if you'd like to stay in communication and what next steps are.
- If it was determined that a partnership might be feasible, it is a good idea to allocate some follow-up work to individuals to assess their capacity to actually turn verbal interest into a commitment with action. It may take time to persuade enough people in the prospective organization that this partnership will be worth the time and effort involved.
 - Determine who will do what, when and when you will come together to discuss. Schedule the first partnership planning meeting.
 - Determine who needs to be at the table for this partnership to be approved and the best method to gain their buy-in. Who should be involved? Do we have all the right people together?
 - Determine how you will together develop the case for this partnership. Outline what additional research, materials or legwork needs to be completed to develop the case for the partnership.
 - There may also be some value in organizing special activities (workshops, site visits, and exchanges) between potential partner organizations to explore the idea of partnering more fully and collaboratively committing.

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples

Assessing Risks, Rewards, and Self-Interests

Risk, Rewards, and Self-Interest Worksheet		
Category	Specific Examples:	Details:
Risk Considerations	<i>Reputation impact</i>	<i>All organizations and institutions value their reputation and will rightly be concerned about whether that reputation can be damaged either by the fact of the partnership itself or by any fall-out in future should the partnership fail</i>
	<i>Loss of autonomy</i>	<i>Collaboration means less independence for each organization in areas of joint work</i>
Reward Considerations	<i>Professional development of key personnel</i>	<i>Many times, cross-training of key staff occurs when implementing a partnership</i>
	<i>Better access to information and different networks</i>	<i>Networks grow and broaden as potential partners come together</i>
Self-Interest Considerations	<i>What does our organization need to get in the next twelve months to stay engaged in the partnership? What about the next eighteen to thirty-six months?</i>	<i>Possible answers might include additional organizational members or volunteers; enhanced products or services; greater community credibility or support; and improved access to businesses, agencies, or foundations.</i>

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Resource Mapping

Resources available for partners to contribute to the partnership.

Resource Mapping			
Resource Categories	Resource Offerings	Organization	Details:
Information Capture	Database / Statistics / Legal framework		Can offer use of participant database
	Market analysis / Forecasting		
Accommodations:	Partnership / Project Office		
	Meetings / Workshops		Conference Room
Products	Food		
	Materials		
Information Dissemination	Electronic communications systems		Monthly e-newsletter
	Word of mouth		
Expertise	Technical experts		
	Program development		
Relationships	Donors		Have three funders interested in this partnership
	Policy makers		
People	Administrative Support; Specialist Staff		

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Shared Vision and Goals for the Partnership

Shared Vision and Goals Partnership Planning Worksheet		
Discussion Item:	Discussion Details:	Outcome and Next Steps:
What is the shared vision for this partnership?	Define the shared vision for the partnership. Is there a genuine shared vision for the partnership? Is there a common understanding of/and agreement to the vision and are these documented? What is the purpose and outcome of the partnership?	
What is the function and nature of the partnership?	What is the nature of the partnership? Has this been established? It is important that members of the partnership are clear at what level and function this partnership is operating (e.g., advisory, strategic, networking, joint working, or project-based).	
What are the goals of this partnership?	Define clear partnership aims and objectives, with objectives expressed as outcomes for users. Are there shared goals/objectives for this partnership and are these documented? Are the partnership aims and objectives realistic?	
Do all partners understand how to achieve this?	Members need to agree and understand what their role and responsibilities are within the context of the purpose and outcomes of the partnership. What is everyone's role and specific responsibilities? How will we manage collective decision-making, delivering activities, and representing the partnership?	

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Responsibilities, Arrangements, and Objectives of Leadership

Responsibilities, Arrangements and Objectives of Leadership Partnership Planning Worksheet		
Discussion Item:	Discussion Details:	Outcome and Next Steps:
Discuss the leadership of the partnership	Who will take the lead?	
	Who will have responsibility for driving the partnership agenda forward?	
Discuss objectives and responsibilities of leadership	What will be the partnership leader's objectives and responsibilities? What accountability arrangements will be put in place?	
Gain alignment and consensus	Do all members agree to these procedures? If not, what needs to happen for this to occur?	
Documentation of progress	Document a clear written statement of who will take the lead/joint lead, their objectives and responsibilities, and to whom they will be accountable.	

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Partnership Plans and Priorities

Partnership Plans and Priorities Worksheet		
Discussion Item:	Discussion Details:	Outcome and Next Steps:
Identify benefits for target groups	What are the benefits to target groups in establishing this partnership? Has the partnership agreed or identified outcomes for specific target groups? If not, why not?	
Create partnership strategy/action plan	Does the partnership have a strategy/action plan that clearly sets out why the partnership was set up, what it is going to achieve, who is going to do what, and by when? Where does this strategy/plan fit into wider strategies, and how does it link into partner strategies/local priorities? Have the group answer these questions: 1) Our collaborative group will do what (action) 2) For whom (who do we serve?) 3) So that (result of our action)	
Develop short-term, intermediate, and long-term outcomes for your collaborative work plan	Identify how you will determine the success of your activities and efforts. What indicators will you measure?	
Do all partners understand how to achieve this?	What skills and competencies do we need to manage and support the partnership? Has a full assessment been made of the skill and competencies required to support/manage the partnership? The partnership needs to understand what skills and competencies it will need to achieve the agreed goals, as well as to ensure processes are effective. Consideration will need to be given to making training resources available.	
To whom will the partnership report? Is there a process to report on progress?	Communicate group accountability and interdependence of activities. Showing people how their specific tasks impact the completion of the overall task is a good way of communicating the expectation of accountability. Having an effective structure for open, honest communication can support conversations of accountability as issues arise. Document the lines of accountability/reporting processes:	

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Partnership Ground Rules

Partnership Ground Rules Worksheet	
Ground Rules Discussion Items	Outcomes and Next Steps:
<p>Is there a robust communication strategy in place? Do partners know about each other's organizations and what the pressures and imperatives are? How will we communicate about this partnership and within our partner organizations, sharing knowledge and information?</p> <p>It is important to have an effective communication system in place at all levels within the partnership and within partner organizations, sharing knowledge and information. Document the communication strategies:</p>	
<p>Is there an accepted process for decision-making? Who is the accountable individual for the partnership?</p> <p>The decision-making process needs to be understood by all members of the partnership. Decisions should be made through recognized processes with partners having equal power. Processes for decision-making need to define a quorum, how decisions will be recorded, and arbitration processes. Document the decision-making processes:</p>	
<p>Is there an accepted performance management framework? Are processes in place to monitor performance and act on results? Do defined criteria exist against which to benchmark achievements?</p> <p>Individuals responsible for delivery of the plan to the partnership need to be specified. Document the performance management framework:</p>	
<p>Is there an accepted commitment to joint investments/resources to support the partnership by all the organizations/individuals?</p> <p>Resources mean more than just money; they include time, knowledge, energy, and personnel. Document the accepted commitment to joint investment/resources:</p>	
<p>How will we inform new members of the partnerships purpose, goals, and objectives? What will the orientation process look like? Document the orientation process for new members:</p>	

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Collaborative Work Plan

Collaborative Work Plan					
Partnership Title:					Year:
Shared Vision for Partnership:					
Goal(s):					
Outcomes:					
Task/Activity	Completion Date	Responsible Party	Team Members Involved	Resources needed	Evaluation Method
<i>Tasks or activities to achieve the outcomes</i>	<i>Anticipated Completion Date</i>	<i>Which organization and staff member</i>	<i>Who else will be needed to complete the activity</i>	<i>Indication of activity costs or resources needed for completion</i>	<i>Ensured that measures to assess the effectiveness of an activity are included in the plans such as recording achievements or collecting data</i>

Coffee with CAP: Developing and Sustaining Dynamic Partnerships

Resources, Tools, and Examples



Evaluation and Monitoring

Partnership Evaluation Questionnaire				
Evaluation Questions	Yes / No	Improvement Strategies	Timeline for Improvement	How will you measure success?
Do partners still share a common vision? Do members understand and agree to the purpose and accept it as important?				
Are changes to the shared vision needed? Are partners willing to make changes?				
Does the work of the group still link to overarching organizational/national/local policies and strategies? If the work of the group does not easily fit or link into any such policies/strategies, ask why the group is in existence.				
Is everyone aware of/in agreement about the goals, objectives, and outcomes? Does the group measure progress against outcomes? Is this done on a regular basis?				
Does the group work well together? How effectively does the group meet its goals and objectives? Are these reviewed/revised in light of any new policy/priorities?				
Is there a clear understanding of each partner's roles and responsibilities? Have these changed? Is this monitored?				
Is the purpose of the group known and understood <u>outside the partnership itself</u> ? Is adequate information available about the partnership and its decisions? Is there an effective communication strategy?				
Is there adequate monitoring, evaluation, and feedback? Does the partnership review its aims/objectives in the light of any changes/challenges to the outcomes?				
Is the partnership achieving outcomes? Is this communicated internally/externally?				
Have any organizational improvements occurred after establishment of the partnership? Has the partnership adapted to these changes?				
Do formal and informal communications take place? Is there regular communication? Does the partnership work in an open way?				
Does the partnership membership represent the right people? Are changes needed?				