The Partnership Toolkit:

Tools for Building and Sustaining Partnerships

Prepared by the
Collaboration Roundtable
Spring 2001

with Funding from

Involve BC, Ministry of Community Development, Cooperatives and Volunteers

and

Community Liaison Division, Ministry of Multiculturalism and Immigration

TABLE OF CONTENTS

1. MANY THANKS

Very many individuals and agencies helped prepare this tool kit. The Collaboration Roundtable wishes to thank:

- members of the Collaboration Roundtable Steering Committee for offering insightful comments at every stage of the project;[1]

- MOSAIC and Nisha Family and Children's Services Society for managing the project;

- the Ministry of Community Development, Cooperatives and Volunteers and the Ministry Responsible for Multiculturalism and Immigration for funding the project,

- the agencies who organized and hosted the toolkit workshops, i.e. the Canadian Mental Health Association of the East Kootenays, Immigrant and Multicultural Services Society of Prince George, Inter-Cultural Society of Greater Victoria, Kamloops Cariboo Regional Immigrant Society, Pacific Immigrant Resources Society and Surrey Delta Immigrant Services Society. Over 130 people representing almost 90 different organizations attended these workshops. **Appendix D** presents the participating organizations.

- the two individuals who developed the tools and tested the toolkit's practicality during the six workshops, i.e.:

Dr. Martin Spigelman
Martin Spigelman Research Associates
3785 Kathleen Street
Victoria, BC V8P 3H7
Telephone: (250) 361-3663
Fax: (250) 361-3789
Email: spigelman@aol.com

Zena Simces
Zena Simces and Associates
3905 Parkway Drive
Vancouver, BC V5L 3C9
Telephone: (604) 739-0815
Fax: (604) 739-0840
Email: zenasimces@aol.com

[1] Background on the Collaboration Roundtable and its membership are included in **Appendix C**.

2. How to Use This Toolkit

Partnership

A partnership is defined as a *relationship where two or more parties, having common and compatible goals, agree to work together for a particular purpose and/or for some period of time*. Partnership can offer certain benefits, for example allowing agencies to:

- provide more comprehensive, coordinated and holistic services;
- achieve administrative efficiencies and savings by avoiding overlap and duplication; and
- learn from each other.

At the same time, however, partnerships present very significant challenges. They often require a great deal of effort to build and sustain. They can create new legal or financial liabilities. Importantly, partnerships that do not perform effectively can compromise an agency's credibility with both its funders and its community.

Purpose of the Toolkit

This toolkit is intended to help organizations build and sustain partnerships, by helping them meet the challenges and achieve the benefits associated with partnering. We think the toolkit will help the full range of organizations working in our communities, for example:

- multicultural, ethnocultural, Aboriginal and mainstream organizations, including funders;
- large and small organizations; and
- those with paid staff and those that rely upon volunteers.

We hope the toolkit will meet the full range of needs and address the full range of circumstances. Some tools will enable smaller agencies to work more effectively with larger agencies. Other tools will enable community agencies to work more effectively with funders. Certain tools emphasize the importance of respecting cultural differences and thereby will help very different organizations to work well together. Some of the tools are targeted to partnerships that are expected to last for an extended period of time. Others are targeted to short-term partnerships operating with very limited funds.

How to Use the Toolkit

We encourage you to read through the **entire** toolkit. After the introductory sections and evaluation questionnaire, it presents a "Primer on Partnerships" (Section 6) that gives an overview of what makes for a successful partnership. A series of practical tools follows the Primer. Each of these is designed to meet a specific need. One tool (Section 9) will help you work with funders while another - the Model Partnership Agreement (Section 12) – will help you define how your partnership will be organized and structured. The Evaluation Tool (Section 18) will help you assess your partnership.

There is even a tool (Section 18) to help you dissolve your partnership, and to do so in a constructive manner.

In all likelihood, you will use different tools at different times depending upon your organization's own needs. The tools are generic, and have to be in order to meet the variety of needs and circumstances. They will work best if you **customize** them for your own organization and its specific needs. There is also some overlap and duplication so that each tool could "stand alone" if need be.

The tools were carefully tested,

- first with the Collaboration Roundtable Steering Committee, and
- then during the six workshops identified on the following page.

Over 130 people and almost 90 organizations participated in these workshops (See Appendix D). Most of their comments, ideas and suggestions have now been incorporated into the toolkit although some will have to be addressed over time as the toolkit is further refined.

Location	Host	Date (2001)	No. of Participants
South Fraser Region	Surrey Delta Immigrant Services Society	March 29	
Vancouver	Pacific Immigrant Resources Society	March 30	
Vancouver	Pacific Immigrant Resources Society	March 31	
Victoria	Inter-Cultural Society of Greater Victoria	April 3	
Prince George	Immigrant and Multicultural Services Society of Prince George	April 4	
Kamloops	Kamloops Cariboo Regional Immigrant Services Society	April 4	
Cranbrook	The Canadian Mental Health Association of the East Kootenays	April 5	

The full toolkit is available from:

- MOSAIC (1522 Commercial Drive, Vancouver, BC, V5L 3Y2); and
- Nisha Family and Children's Services Society (201 – 2830 Grandview Highway, Vancouver, BC V5M 2C9), or
- from their web sites at www.nisha.org and www.mosaic.bc.com.

Eventually we hope to have a special tool kit web site that will include a "chat room" where you can discuss your partnership issues with other organizations and a "best practices" resource centre.

3. The Rules of Partnership

The Toolkit Rules of Partnership:

- ✓ Be clear about your objectives and know why you are partnering.
- ✓ Build on each partner's strengths.
- ✓ Develop trust by being open, transparent and honest.
- ✓ Be clear about each partner's roles and responsibilities.
- ✓ Communicate openly and be prepared to resolve differences as they arise.

4. Was this useful? How can we improve the toolkit?

The Collaboration Roundtable hopes to update these tools and the toolkit on a regular basis. Your experience will help us do so. Please complete this questionnaire and return it to us.

Agency Name: ______________________

Location: ______________________

Contact Name: ______________________

1. How did you locate this toolkit?

☐ mailed to our organization
☐ internet (please identify website)
☐ other (please identify)

2. Which tool or tools did you use?

☐ (7) Outreach/Identifying Partners
☐ (8) Compatibility Test
☐ (9) Working with Funders
☐ (10) Management & Decision Making
☐ (11) Ensuring Accountability
☐ (12) Partnership Agreement
☐ (13) Legal/Liability Issues
☐ (14) Internal Communications
☐ (15) Promotion and Public Relations
☐ (16) Resolving Conflict
☐ (17) Dissolving Partnerships
☐ (18) Evaluation
☐ Appendix A, Glossary of Terms
☐ Appendix B, Partnership Resources
☐ Appendix C, Collaboration Roundtable

3. How useful was the tool? (please offer an opinion for each tool you used)

Tool	Very		Useful		Not Very
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐

4. Was the tool easy to understand? (please offer an opinion for each tool you used)

Tool	Yes	No
	☐	☐
	☐	☐
	☐	☐
	☐	☐

5. Have you any suggestions for improving the tools you used? (please offer an opinion for each tool you used)

Tool	Suggestions?

6. Do you have any suggestions for improving the toolkit as a whole?

7. Do you have any other comments on the toolkit?

Thank you for your comments and suggestions. Please send this form to either of the Collaboration Roundtable Co-Chairs:

Eyob Naizghi
Executive Director
MOSAIC
1522 Commercial Drive
Vancouver, BC V5L 3Y2
(604) 254-0244
enaizghi@mosaicbc.com

John Coward, MA
Manager of Partnerships and Employment Programs
Nisha Family and Children's Services Society
#3 – 10318 E. Whalley Ring Road
Surrey, BC V3T 4H4
(604) 951-4821
jcoward@nisha.org

5. Before you enter a partnership, you need …

Vision and purpose	Commitment	Time	Capacity	Welcoming culture	Funding
Your organization needs a clear sense of why it is entering a partnership. What can you contribute to it? What will you get out of it?	There has to be a strong desire within your organization and at all levels in your organization. It has to be willing to learn and to share.	Your organization has to be prepared to devote the time necessary to make the partnership work. There is no quick and easy way to successful partnering.	Your organization needs to have the capacity to enter a partnership. If you are stretched to the limit now, you will need to figure out how you can incorporate the additional work.	Your organization's culture has to be able to welcome new people and new ideas.	Partnerships may create some additional expenses for your organization. Are you prepared for these costs?

6. A Primer on Partnerships

What Does Partnership Mean?

A partnership is defined as a *relationship where two or more parties, having common and compatible goals, agree to work together for a particular purpose and/or for some period of time.*

This relationship may be anything **from** a loose agreement to communicate and share information **to** a concrete joint venture. Partnerships may be short or long term. When initiating a partnership, partners need to reach a common understanding of what the partnership means to them.

Having the right people at the right time
doing the right things together
is what we strive for when creating partnerships.
Partnerships are about people working together.

Benefits and Challenges of Partnering

The **benefits** of partnering are becoming more evident. They include the opportunity to:

- access certain resources, share resources or make better use of limited resources (space, staff, funding, equipment or in kind);
- carry out an initiative that would be difficult or could not be done alone;
- promote exchange of information;
- may be the only way for new, small volunteer-based organizations to access funding;
- enable more effective exchange, sharing or referral of clients or customers;
- be more efficient by avoiding duplication or overlap;
- act as a more forceful lobby or advocate;
- develop creative solutions emerging from the partner's differing perspectives;
- share knowledge, know-how and ideas;
- deliver a more comprehensive program or service than could be done alone - a more holistic approach to services and programs;
- increase capacity and strengthen the organization;
- ensure greater accountability, responsiveness and transparency;
- enhance community participation - increased involvement in decision-making;
- facilitate the sustainability/survival of an organization or initiative.

Often the overall benefit is not only to the partners concerned but also to the community.

Partnerships may present significant challenges. This can consume a great deal of time and energy.

The **challenges** of partnering include:

- could put an agency at some financial risk or legal liability;
- may confuse reporting and accountability;
- may make people nervous because changes to the organization are required;
- could compromise cultural and organizational values;
- could cause tension and conflict between the partners;
- could require too much time; and
- will often mean some loss of identity, power and autonomy.

Importantly, a partnership that does not perform effectively can compromise an agency's credibility with both its funders and its community.

Features of Successful Partnerships

What makes some partnerships work better than others? It takes time to develop successful partnerships. Developing a trusting relationship where all partners feel that there is mutual benefit from the partnership is essential for success. Partnerships will have a sound basis if the **right partners** are chosen for the **right reasons.** To develop a long-term successful partnership, the following elements are critical:

A. Entering into Partnerships

Before entering into negotiations, identify why you need to partner, and who would be the most appropriate partners. It may be necessary to have a preliminary discussion with potential partners to discuss relevant issues prior to making a decision that a partnership is desirable. It is important to ensure that the each organization is ready, willing, and able to be a partner. **Experience tells us that time spent in the beginning, establishing a firm foundation, will be saved in the long run by greatly increasing the probability of success.** More specifically, the following preparatory work should be done:

Welcoming culture

- Ensure a welcoming culture. This refers to both the 'organizational culture' and the different cultural backgrounds of individuals within the organization.
  Organizational culture is best defined as the beliefs, values, norms and philosophies that guide how an organization operates, both internally and in relation to other groups. One organization's culture may encourage staff to take risks while another promotes caution. One may operate much more informally than another.
  The different cultural backgrounds of individuals and groups within the organization bring different languages, customs, beliefs and ways of doing things together that need to be dealt with sensitively.
  These differences can lead to difficulties in working together unless they are acknowledged and measures are introduced to deal with them.

- You need to ensure that both your own organization and that of your potential partner have an organizational culture which supports cooperation and collaboration, and are sensitive to each other's individual and group cultural differences.

Membership

- Identify who are the people in the partnership. Find out who the key players are and meet with them to determine if they have similar interests. Partners should be carefully selected based on their "stake" or vested interest in the goals of the partnership.

Mutual Benefit

- Clarify the common need for the partnership - **why** partner?

- Identify what value there is in partnering and how each partner can benefit. It must be clear that there is a value-added for all parties and a win-win situation for each partner

Common Mandate/Purpose

- Reach agreement on the mandate or purpose of the partnership as well as the purpose of the programs/services/initiatives resulting from the partnership.

Other key factors important in the initiating stage:

- Establish an overall commitment to working together to negotiate the partnership.

- Begin by agreeing to a common language that can be used by all the partners to understand each other.

- Establish a set of principles to guide the negotiations.

- It is advisable to establish common goals and objectives and identify roles and responsibilities before you enter into a partnership. Clear goals and objectives and agreed to roles and responsibilities are also critical to maintain the partnership.

B. Maintaining Partnerships

To maintain or sustain partnerships and ensure their sustainability, a number of critical elements are required:

Shared Vision

- Start the partnership process by establishing a common vision. Visioning encourages participants to look at the positive or ideal and allows a bit of dreaming about the future. It is important in a partnership to share a common vision, so there is an agreement on what the future could look like as a result of the efforts of the partnership. Once groups capture their vision, it is easier to move to identifying more specific goals and objectives.

Common and Compatible Goals and Objectives

- Identify goals and objectives (both short term and long term ones) that state desired outcomes to make the vision a reality. Goals and objectives are measurable accomplishments that can be evaluated to determine if the partnership succeeded in doing what it set out to accomplish.

- Acknowledge that partners may have their specific priorities and build on this.

Division of Roles and Responsibilities

- Recognize the importance of each partner's role in achieving common goals. Define and document each partner's role in a clear and concise manner, so there is common understanding of what is expected.

- Acknowledge that effective partnerships are not necessarily those in which role sharing is equal. Partnerships are often established on the basis that the partners can play complementary, but separate roles. Partners may be responsible for very different functions or may work together to carry out joint activities.

Balancing Power and Authority (Joint Ownership, Decision-making and Accountability)

- Establish an agreed-to sharing of power and authority. The degree to which decision-making is to be shared depends upon the partnership model to be pursued - cooperative, collaborative or integrated.

- Clarify reporting and accountability relationships. Partners should understand the decision-making model, namely who has authority to make which decisions and what decisions can be made. It is also critical to clarify who is accountable for what and to whom.

- Recognize that giving up some autonomy is inevitable. The challenge is to create an atmosphere where partners feel there is joint ownership.

Effective Communication

- Ensure open, honest and clear communication. There should be no hidden agendas. This will help avoid unnecessary misunderstandings and potential conflict situations.

- Ensure all partners are informed about each other and the issues, and that there is a mutual understanding regarding expectations, roles, responsibilities, decision-making and accountabilities.

- Develop a forum that encourages partners to meet regularly to mutually problem-solve, exchange information and to learn from one another's expertise.

- Develop a process to resolve conflict in advance of serious differences of opinion or perspective.

- Listen to partners. Listening is critical to effective communication. It demonstrates respect and promotes awareness of strengths, biases and conflicting interests.

Supportive Structures and Processes

- Ensure that your organization is prepared to implement structures and processes that support partnerships. This may require implementing mechanisms to ensure input of all partners. **Participation of staff at all levels** from all partners may sound simple but often requires specific changes to structures and processes to ensure that meaningful participation actually occurs on an ongoing basis.

- Develop and adapt structures and processes to accommodate different practices existing among the partners.

Commitment

- Seek commitment to the partnership from each of the organizations involved. Agreeing to work together is the foundation of a partnership. Often this step is missed because it is assumed that those who are participating are committed

- Affirm that everyone is committed. Initially the commitment may be an expressed as willingness to come to the table to support a partnership. For the partnership to be successful, the commitment needs to extend to making the partnership work over the long term. All parties must have the belief that the partnership is needed and that problems and issues can be and will be overcome.

Trust and Respect

- Recognize that the building of trust can be a delicate and time-consuming process, but it is critical to the success of partnerships.

- Involve all partners as early as possible, so that there is a sense of ownership and commitment from the start. Trust and respect is built over time. Time is needed for partners to get to know each other, to break down traditional stereotypes and to build trust. Be sensitive to each other's needs and to individual agendas.

- Recognize that transparency, integrity, and good communication are essential in building trust and in fostering mutual understanding of each other's constraints and strengths.

- Bring potential conflict, control issues or hidden agendas out into the open and deal with them in an honest and caring manner.

Commitment of time

- Allocate sufficient time to discuss the partnership and come to agreement on the terms of the partnership. Partners must be willing to commit the necessary time, energy and expertise to make the partnership work. Nurturing takes time.

Leadership

- Ensure strong leadership exists to initiate the partnership, champion the partnership vision, and manage the ongoing operation of the partnership. Leadership plays a critical role in maintaining good relations and enhancing trust and respect. Leaders need to be patient, articulate, fair and sufficiently knowledgeable to inspire the confidence of all players.

Resources

- Decide what resources are critical to the partnerships and what each partner can contribute. Resources take on different shape and meaning in each partnership, although they typically involve human, financial and infrastructure considerations.

- Don't assume what the other partner can bring to the table. Clarify what you need, what you have and how you will obtain the resources that are required.

Partnership Agreement

- Establish a contract, an agreement or memorandum of understanding to document what has been agreed to by the partners for managing the partnership and to facilitate accountability, regardless of the magnitude of the partnership.

- Ensure the partnership agreement:
    - defines objectives so that all parties know what they can expect from the arrangement;
    - defines roles and responsibilities of each partner;
    - clarifies the management model, and the processes to be used for decision-making, the delegation of authority, monitoring and reporting mechanisms (accountability);
    - outlines financial obligations and resource commitments;
    - includes agreed upon evaluation and assessment objectives;

- provides for a process to resolve conflict and to terminate the partnership to avoid turmoil if the relationship runs into difficulty.

Continuous nurturing

- Recognize that maintaining partnerships requires continuous nurturing. It takes time to foster trust. You need to work within your partners' time frames and be willing to invest in the effort, make commitments and take risks. It is critical to resolve any hidden motives, power or control issues. It is just as important to show gratitude and appreciation to your partners on an ongoing basis.

Mutual Recognition

- Ensure recognition of the contribution each partner makes to support the partnership. This helps to reinforce the win-win for all, strengthens the commitment to work together and fosters a positive environment. Motivation and future involvement are dependent on how well members in a partnership are treated and whether or not they feel recognized.

Adaptability and Flexibility

- Develop the capacity to change as the relationship matures or goals are redefined. This is critical to the continued success of the partnership.

- Be prepared to modify the partnership vision on the basis of new information and new needs.

- Be flexible to cope with changes in the external environment such as financial instability, government reorganization, new legislation and changes in community needs and priorities.

- Be sensitive to each partner's needs and be flexible to adapt to each other's needs

Building capacity

- Ensure that partners are equipped to deliver according to expectations and to contribute effectively to the partnership. This may require time and resources for training.

- Establish an environment where continual learning is valued.

- Ensure that the skills and abilities of the partners grow together for the future advancement of the partnership. Skills commonly used in developing and maintaining successful partnerships include traditional management skills such as: strategic planning, financial and human resource development, as well as specialized skills such as: facilitation, team building, working with diversity, conflict resolution and negotiation, stress management and motivation.

Evaluation

- Evaluate the partnership model and relationships on an ongoing basis. Evaluation is the component of the process that allows a partnership to assess its progress and measure success.

- Consider evaluation from the start of the process, even though it usually appears as one of the final steps. When developing goals at the beginning of the partnership, there should be discussion about desired outcomes, indicators of success and how information will be gathered to measure success.

- Revisit the goals and objectives and outcomes resulting from the partnership on a yearly basis.

- Solicit wide input into the evaluation process from all partners and from staff at all levels of each organization.

- Be prepared to make changes based on the findings of the evaluation.

The Tools

7. Outreach and Identifying Potential Partners

Purpose

Partnering is an ongoing process. Time spent up front to prepare for partnering is a good investment and will pay off later. The purpose of this tool is to assist all organizations to consider key questions before entering into a partnership. It is important to go into a partnership with "your eyes open".

Organizations may have very different reasons for wanting to partner. Small voluntary organizations may need to partner to gain the skills and capacity to carry out their desired objectives. They may require mentors to help them grow and strengthen. Larger organizations may not have the knowledge of the community they are serving and it would be of value to them to partner with smaller voluntary organizations that have experience in working with volunteers and have first hand knowledge of specific communities. Some partnerships are not out of choice, but necessity. Funders may require some partnerships.

Recognizing that partnerships can come about for many different reasons, the following is provided to assist you to prepare for partnering.

1. **Why Do You Want To Partner?**

2. **Are You Ready To Partner? A Self-Assessment Tool.**

3. **What Kind Of Partnership Do You Want?**

4. **Develop A Partner Profile.**

5. **How Do You Identify New Partners?**

1. Why Do You Want To Partner? Checklist

You first need to be very clear why you want to partner. You may be entering into a partnership by choice or out of necessity. You may be initiating the partnership on your own or it may "forced" upon you by a funder or other third party. Partnering may be the only way to obtain funding. Regardless, it is important to identify what you hope to gain from the partnership.

Review this checklist and check one or more of the following reasons for WHY you want to partner.

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: ______________________________

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

Before you enter into a partner ship, 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.
Refer also to the Partnership Rating Tool in the next section that can also be used by organizations as a self-test to determine their own readiness to partner.

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?	☐	☐

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? E.g.,
- Is it short term?
- Is it meant to be a trial basis for a long term partnership?
- Is it intended to be long term?
- Is there 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. See "Continuum of Coordination" chart on the next page.

Types Of Partnerships
Continuum Of Coordination

The following chart identifies three major types of partnership models along a continuum of coordination. Partnerships can fall anywhere along this continuum. The key question is what do you want to achieve by the partnership. Partnerships can move along this continuum, becoming more integrated as partners get to know each other better and the level of trust increases.

A key characteristic that differs as you move along this continuum is the degree of decision-making authority each partner retains or is willing to give up.

Examples of Three Partnership Models		
Cooperative Model	**Collaborative Model**	**Integrated Model**
Each partner: • maintains its own decision-making responsibility • remains autonomous • retains own identity • has own staff & budget • has full responsibility for its actions	Each partner: • shares decision-making responsibility & authority • has particular roles and responsibilities • is accountable to the other • contributes resources • surrenders some measure of its autonomy	Each partner: • 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
Decision Making • by consensus • agreement not necessary in all cases	**Decision Making** • by consensus • agreement necessary	**Decision Making** • by vote if necessary • agreement necessary

4. Develop A Partner Profile

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
- Cultural sensitivity
- List other desirable characteristics

5. 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.

Complete chart "A" attached to assist you in identifying new partners. Use the following as a guide.

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 contact/leaders in your community

2. Identify the potential role these partners could play

For example, 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 office, and other information available. This may 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 orgnanizations 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.**

8. **Proceed to apply the detailed Partnership Rating Tool (discussed in the next section) to these organizations.**

Identifying New Partners – Chart A

Organizations	Potential roles	Involved in other partnerships	Pros	Cons
Government 1. 2.				
Service Provider 1. 2.				
Community group				
Consumer/ advocacy				
Educational group				
Business				
Other				

8. A Partnership Rating Tool

Purpose

The purpose of the Partnership Rating Tool is to help identify similarities and differences between you and your potential partners to determine if there is a good fit. While the people involved play a large part in bringing a partnership together and making it successful, for the partnership to last, the organizations need to share similarities and build on differences. Differences do not necessarily mean that you are not compatible (there is not a good fit) with your potential partner. These differences may indicate strengths that the partner brings. They may also point to critical differences that should be addressed to ensure the success of the partnership.

Instructions

The Partnership Rating Tool (See Partnership Rating Chart on the next page) can be:

- Used as a self-test for your own organization to determine where it stands on each of the elements identified. This will help determine your own readiness to partner.
- Completed on your own, if you are able to obtain the required information.
- Completed by your potential partner, upon your request.
- Completed jointly with you and your potential partner.

  Note: A potential funder may be interested in seeing a completed rating tool when considering funding a particular partnership.

To complete the rating tool, consider the following:

- Ensure you have collected all the information required to make the assessment. If you do not have the required information, have your potential partner do the rating or complete it together with your potential partner.
- Use a scale of 1-5, with 1 being low and 5 being highly compatible. Give a rating to each element to determine similarities and differences with the potential partner organization.
- Total rating provides an average and gives you an indication of higher or lower compatibility. Total rating may be less important than the individual scores.
- Pay attention to the rating of each element. Any element that gets a rating of 1 or 2 may point to differences that could be strengths to acknowledge or weaknesses to address.

Partnership Rating Chart

Each element identified below is explained in the following pages.

ELEMENTS (How your rate each partner on a scale of 1-5 on the following elements?)	PARTNER A	PARTNER B	PARTNER C
1. Has similar organizational culture			
2. Is cultural sensitive			
3. Values acceptance and integration			
4. Has a solid reputation			
5. Shares your vision			
6. Has common goals and objectives			
7. Has clear division of roles and responsibilities			
8. Has skills and capacity you need			
9. Communicates effectively			
10. Has effective ways of resolving conflicts			
11. Is flexible and adaptable			
12. Has a supportive leadership style			
13. Recognizes and rewards success			
14. Willing to share decision-making authority; willing to give up some autonomy			
15. Has similar accountability processes			
16. Has similar administrative processes			
17. Has similar wages and benefits structure			
18. Has procedures to deal with liability issues			
19. Willing to share resources			
20. Willing to have a partnership agreement			
21. Shows commitment			
22. Willing to reassess the partnership			
23. Provides value-added			
24. Fosters a sense of trust			
TOTALS			

Explanation Of Elements In The Partnership Rating Tool

1. Has Similar Organizational Culture

Organizational culture is best defined as the beliefs, values, norms and philosophies that guide how an organization operates, both internally and in relation to other organizations and partners. One organization's culture, for example, may encourage staff to take risks while another encourages caution. One may operate much more informally than another. Organizations with very different cultures can have difficulty working together unless the differences are acknowledged and measures are introduced to make them compatible.

2. Is Culturally Sensitive

An organization that is culturally sensitive respects the different cultural customs and belief of individuals and groups within the organization. Language barriers are addressed and accommodations are made to respect cultural diversity. Does the organization have any written policies on equity?

3. Values Acceptance and Integration

This refers to creating an atmosphere where everyone feels part of the organziation, where everyone feels comfortable, safe and fully accepted.

Note: Organizational culture, culture sensitivity, and acceptance an d integration are all different and although difficult to assess and measure, are critical factors for successful partnerships and need to be considered,

4. Has a Solid Reputation

Would you be proud to be associated with this organization? Does it have influence and a good reputation in the community? Does it have a history of success?

5. Shares Your Vision

Do you and your potential partner agree on what the future could look like as a result of you common efforts?

6. Has Common Goals and Objectives

Do you and your potential partner have similar long-term goals and more focused short-term objectives? Do you see eye to eye on major strategies that could be used to reach the objectives? If your goals or objectives differ, are there other similarities such as: similar mandates, services, target audiences, or catchment areas.

7. Has Clear Division of Roles and Responsibilities

Does your potential partner clearly identify different roles and responsibilities within its organization? Do you see the roles and responsibilities within your organization fitting in with those of your potential partner?

8. Has Skills and Capacities You Need

Does your potential partner have skills and capacities that you require or are compatible with your needs, such as planning, program development, service delivery, financial management, fundraising, etc.?

9. Communicates Effectively

Does your potential partner share information readily? Do they use language that is simple and plain? Do they have processes of communication that are similar to your organization or that you feel are effective? Do you feel that they listen and take the time to understand?

10. Has Effective Ways of Resolving Conflict

Is your potential partner willing to resolve differences in a fair and equitable manner?

11. Is Flexible and Adaptable

Does your potential partner exhibit a willingness to accommodate and make changes as new information becomes available or circumstances change?

12. Has a Supportive Leadership Style

Does your potential partner exhibit leadership that is supportive to your organization?

13. Recognizes and Rewards Success

Does your potential partner have a process to recognize and reward people for their efforts? Are you in agreement with this? If no process is in place, do you believe the organization would be willing to develop a system of recognition and rewards?

14. Willing to Share Decision-making Authority

Does your potential partner have a clear and understandable process for decision-making? Is there a willingness to share decision-making authority, that is, give up some of their decision-making autonomy? Do you believe you can reach an agreement on how power and authority will be shared?

15. Has Similar Accountability Processes

Are there processes in place that clearly identify who is accountable to whom and for what? Are these processes similar to what you have in your organization, and if not, do you feel they are fair and you would be willing to abide by them?

16. Has Similar Administrative Processes

Are there administrative processes and functions in the organization that deal, for example, with human resources, financial matters, space and equipment, etc.? Are these processes clear, fair and similar to what your organization? Or do you find these processes acceptable? Is the potential partner willing to put in place administrative processes and structures that would support the partnership?

17. Has Similar Wages and Benefits

Are the wages and benefit structures similar or compatible with your organization so all employees are treated fairly? How are volunteers compensated in each organization? Are their union versus non union issues that need to be addressed?

18. Has Procedures to Deal with Liability Issues

Does the organization have liability insurance? Are you satisfied with the way the organization protects itself from liability? Is this similar to your organization?

19. Willing to Share Resources

Is the potential partner willing to contribute resources such as staff, volunteers, funding, space equipment etc? Is the potential partner willing to work with your organization to seek out other sources of funding?

20. Willing to have a Partnerships Agreement

Is the potential partner willing to put in writing the terms of the partnership?

21. Shows Commitment

Is the potential partner willing to commit time and effort to the partnership? Is it willing to spend the time needed to nurture the relationship?

22. Willingness to Reassess the Partnership

Is the potential partner willing to step back and assess the partnership at various stages? Is there a willingness to changes as the partnership evolves?

23. Provides Value-added

Does the potential partner have something special or unique to contribute that enhances the value of your organization?

24. Fosters a Sense of Trust

In the final analysis, do you feel that the potential partner can be trusted in all respects? Do you feel that as a small organization you will be able to maintain your uniqueness within the large environment and not get "swallowed up"?

9. Working with Funders

Purpose

The purpose of this tool is to strengthen the ability of partnering agencies to work with a wide range of different funders in a cooperative and productive manner. For partnering agencies to build a relationship with their funders, it is important to understand what funders expect.

There are many different sources of funding, from different levels of government, businesses, foundations and other non-governmental sources. For a list of community economic and social development funding programs serving British Columbia, See "Inventory of Community Economic and Social Development Funding Programs Serving BC, June, 2000, prepared for the Ministry of Community Development, Cooperatives and Volunteers.

This tool addresses the following key issues:

1. **Tips On How To Prepare For Your Initial Communication With Funders**

2. **Tips For Small Volunteer-based Organizations Seeking Funding**

3. **Tips For Large Organizations Funding Smaller Groups**

4. **Funders' Expectations:**
   - **A. What Funders Are Looking For When Approving Funding**
   - **B. Once Funding Has Been Approved, What Are The Funders' Expectations?**

5. **What Is The Role Of Funders In Dealing With Conflict?**

6. **Tips For Writing Funding Proposals**

1. Tips On How To Prepare For Your Initial Communication With Funders

It is critical to check with funders before you spend a great deal of time and effort. This can be done by phone, a letter of interest, or it may be a face-to face meeting.

- First and foremost, do your homework regarding what the funder's mandate is. You need to understand what the funder's interests are.

- Be clear on what you are requesting.

1. Draft a two-page summary of your request that outlines:
   - ☐ Who you are - profile
   - ☐ Who you serve
   - ☐ What program/service/initiative you want funded
   - ☐ What are your expected outcomes
   - ☐ What you plan to do – some specifics
   - ☐ What your capabilities are to carry out the proposed initiative
   - ☐ How much (range) you are requesting
   - ☐ How you will be accountable

2. Follow-up on the initial communication to see if the funder is interested.

2. Tips For Small Volunteer-based Organizations Seeking Funding

Small volunteer-based organizations wishing to partner and seeking funding for a particular initiative need to show funders that they have addressed the following questions:

- **Are you a reputable organization?**
  Do you have a Registered Charities number? Most funders will not fund voluntary sector organizations that are not registered. If not, have you partnered with an organization who is registered? If you are not well know in your community, you should to find leaders in the community or other groups who have had some experience with your organization and can provide a reference.

- **How can you best serve your community**?
  This may not mean providing a service yourself, but working with other groups in the community to ensure a more comprehensive service.

- **What group in the community can best assist you?**
  What can this group offer you? Does it have the administrative structure or the effective accountability mechanism that funders are seeking? Being able to ensure accountability is a key criterion for funders

- **What is your organization's capacity? What skills do you need to develop**?
  Do you currently have the skills to carry out the proposed initiative? Do you have a strong board of directors? Do you have a volunteer force? Where can you gain more experience?

- **What does your organization have to offer?**
  What can you offer a partner that would strengthen the partnership and increase your success for securing funding? (For example, small voluntary organizations have knowledge of the community and a strong volunteer base.) How can you make it a win-win situation for everyone?

Once you have decided to partner and jointly seek funding, develop your own agreement with your partner organization to ensure that responsibilities and funding issues are documented.

3. Tips For Large Organizations Funding Smaller Groups

Large organizations funding smaller groups need to understand the constraints of smaller organizations, for example:

- Smaller organizations are mostly run by volunteers.
- Volunteers may not be able to meet during the day like paid staff.
- Smaller organizations need to be assisted with costs of transportation, child care or other out-of –pocket expenses to enable them to participate in meetings.
- Smaller organizations are not only seeking financial support but can often benefit from a side range of supports.
- Smaller organizations may need mentoring to assist them to secure funding and partners.
- Smaller organizations may need training for their board members in governance issues.
- Larger organizations need to be sensitive to language and cultural differences.
- Larger organizations need to seek ways to build on and utilize the skills and knowledge of smaller organizations and not see them as competitors.
- Larger and smaller organizations need to find opportunities to discuss their differences and needs in an open and honest manner.

4. Funders' Expectations

Large and small voluntary organizations need to recognize that the funding process takes time and there are often different levels of approval with specified timeframes.
Some funders are very "hands-on", very involved in the funding process, while others set the overall framework and are much less active. Regardless of degree of involvement, all funders have certain similar general expectations.

A. What Funders Are Looking For When Approving Funding

Questions Funders Ask:

Have the partners met funder's mandate?

- ☐ How well does your proposal for funding meet the funder's mandate and criteria?
- ☐ How well do you understand what the funder wants?

Is there a need?

- ☐ Is there a documented need for the service/initiative you are proposing?
- ☐ Have you clearly stated what you want to accomplish with the funds requested and why this is important?
- ☐ Do you have factual information to back-up your need? (Statistical information can be obtained from such sources as Statistics Canada, Social Planning and Research Council of BC, Annual Reports from Government Ministries, etc.)

How does the partnership formed benefit the initiative?

- ☐ Are the appropriate groups working together to achieve the stated objectives?
- ☐ How are you working together? Are the roles and responsibilities of each of the partners involved clearly identified?

Do the partners have the expertise?

- ☐ What are each partner's expertise, credentials, and history? Does each partner have the capacity to carry out the responsibilities identified?

Have you sought other assistance?

- ☐ What other sources of funding are being sought and from whom? You need to be open and honest about this.

How inclusive are you?

- ☐ Are you reaching the most people to get the "biggest bang for the buck"?

- ☐ Are you being inclusive and responding to the diverse groups in your community?

Have you clearly stated your results?

- ☐ Have you identified the outcomes or results that will be achieved in the short term and in the long term? How will you measure success? Has an evaluation process been identified?

Have you clearly stated how you will carry out the project

- ☐ Have you clearly identified activities that need to be carried out to implement your project?

Have you identified the staffing and administrative aspects of the project?

Have you identified

- ☐ fiscal and program accountability?

Have you identified your communication processes?

- ☐ This includes how you intend to resolve any conflicts that may arise within the partnership.

Is your budget realistic?

- ☐ Who is getting the funding and what is the funding for?
- ☐ Is the amount you are requesting realistic with what needs to be achieved?
- ☐ Have you clearly identified each partner's contribution of resources?
- ☐ Can you account for all aspects of the budget?

How will funders be recognized?

- ☐ Funders want to know how they will be specifically acknowledged for their contributions.

What is your evaluation plan?

- ☐ Funders expect an evaluation plan to be identified at the start of the project indicating what is going to be evaluated and when.

Finally,

- ☐ Have you completed all parts of the application form clearly and fully? Funders have specific formats and instructions for submitting information and these must be followed.

- ☐ Have you attached your partnership agreement? (See Section on Partnership Agreement Tool)

- ☐ Have you been clear, open, transparent, and frank?

B. Once Funding Has Been Approved, What Are Funders' Expectations?

- ☐ Submit progress reports; these could be quarterly, semi-annual or annual.
- ☐ Provide financial statements. Good financial records must be kept.
- ☐ Give assurance that the service/program being funded is being delivered to the target groups agreed to.
- ☐ Give assurance that the partnership is working for the benefit of the service/program being delivered.
- ☐ Carry out an evaluation and submit as agreed to.

5. What Is The Role Of Funders In Dealing With Conflict Situations?

If conflict arises within the groups who have partnered, and this affects the delivery of the program/service that is under contract, funders have a responsibility to deal with this.

While they may initially turn to those who are managing the contract, if this is not successful, they may go to the organization's board of directors since it has overall accountability for the program.

Funders can, at any point, request a financial or program audit if they have reason to believe the conflict is affecting the delivery of the program.

6. Tips For Writing Funding Proposals

It is essential to follow the instructions of the specific funder in preparing your funding proposal. Many funders have specified formats. Be alert to deadlines for submiting initial interest and final submissions.

The following outlines a format that can used, if one is not specified. The steps outlined below are in the sequence they should appear in your funding proposal and not in the order they should be written. Be concise and use plain language.

Cover Letter

- Should be only one page that highlights what you are asking for, why it is important and, why you are in the best position to deal with this issue.
- Illustrate your strength and set the stage for the proposal.

Executive Summary

- Executive summary should be written after you have completed your proposal.
- Your executive summary must be able to stand alone as a document, so it should summarize the key points in your proposal.
- You should summarize the following
  - Who you are.
  - Why you are in the best position to carry out this project.
  - The need for the project and what supports you have in place.
  - A brief outline of your request, the objectives, methods, budget request.

Project Introduction

- The introduction should be written after you have completed your proposal.
- Keep this section focused and compact.
- In the first two sentences, state your request – what you are asking for and why.
- Include a few sentences about your organization.
- State what you will be addressing in this proposal.

Identify the Need

- A concise statement of need is the first step in creating a solid proposal.
- Clearly illustrate your understanding of the complexity of the need.
- Show why your organization is the best one to deal with this issue.
- Show who and how others may benefit.
- Show how your issue links to the interests of the funding organization.

Specify the Objectives

- Clearly state what you want to achieve - the expected outcomes of your project.
- Be sure your objectives are practical and attainable and that you will be able to measure success.

Identify Partners

- Identify who you are collaborating with or who your partners are.
- Identify why this relationship will benefit the project.
- Outline roles and responsibilities of each partner.

Methods

- Identify in a step by step process how you intend to reach your objectives, in other words, how you intend to carry out your project.
- Provide timetables.
- Illustrate why the methods you have selected are the best to reach your objectives.
- If your are presenting options, suggest the best option under different circumstances.

Budget

- This should include a table outlining expenses as well as income form all sources
- Include in-kind contributions.
- Clearly indicate your organization's contribution and what you are requesting from the funder.
- Indicate how much money is to go to each partner, if applicable.

Qualifications

- Discuss your organization’s special skills.
- Highlight your organization’s achievements/successes of.
- Illustrate your staff’s or volunteers’ credentials and experience.

Evaluation

- Outline your plan to measure the progress in achieving the objectives identified.
- You need to be able to show how you intend to measure results.

Funder Recognition

- Include a section on how you intend to thank funders.
- Funders need to be thanked many times- ongoing process for recognition needs to specified.

Project Sustainability

- Illustrate your long-term plans for funding and how you are committed to becoming self-supporting in the long-term.

Appendix

- List of board members, key resumes, annual report, and financial statements. Statistics to support your position and other related materials to bolster your accountability.

- Attach your partnership agreement or letter of intent that describes the partnership.

10. Management and Decision Making

Organizations often do not have a clear picture of the different management and decision making structures that are possible within a partnership. This is particularly true for organizations that have little experience with partnerships and for situations in which the partnering organizations are very different in terms of size, management structure and organizational culture. Very often it occurs when one partner has paid staff and the other relies upon volunteers.

Purpose

This tool's purpose is to describe some of the options available to organizations for managing a partnership and for making decisions within a partnership. It presents several different models including a confused "sure to fail" model that should be avoided at all costs. The tool also identifies:

- some of the special challenges facing smaller, volunteer-based organizations who are partnering with larger organizations; and
- ways to address these challenges.

Finally the tool lays out a process which you can use to build a management model that best meets your needs and circumstances.

Remember models are intended to be a guide not a recipe. Your organization should consider these models and then design one that best meets your needs. Some organizations – for example those serving the Aboriginal community – may want to design a more circular management model in which everyone has an equal say in decisions.

Considerations:

In deciding upon the best management model and decision making process for your partnership, you will have to consider:

- what role the **funder** will play. Some funders want to be involved and some organizations want the funder to be involved. Other funders and other organizations do not. Some circumstances might make it advisable to include the funder while other circumstances may make that inclusion unnecessary. The models presented on the following page assume that the funder will be involved.
- whether you need **special committees** to advise the management group and to inform the decision making process.
- how the management group will relate to each organization's **Board of Directors**.
- who will **chair** the management committees and who will be responsible for minutes and reporting.
- what will be included in the Management Group's Terms of Reference. These lay out who will be in the Group, what the Group's responsibilities are and what process will be used to make decisions.

The Partnership Continuum

Potential partners can choose from many different management and decision making models. Generally, however, they will fall somewhere on the continuum presented in the following table. This table presents three models ranging from the most loosely organized (the cooperative model) to the most structured and formal (the integrated model).

Management Models		
(a) Cooperative Model	**(b) Collaborative Model**	**(c) Integrated Model**
Each partner: • maintains its own decision-making responsibility • remains autonomous • retains own identity • has own staff & budget • has full responsibility for its actions	Each partner: • shares decision-making responsibility & authority • has particular roles and responsibilities • is accountable to the other • contributes resources • surrenders some measure of its autonomy	Each partner: • transfers decision-making authority to a new structure • integrates its resources with other partners • administers according to common policies and procedures • surrenders a considerable amount of its autonomy
Decision Making • agreement is not necessary since each partner may want to do things differently	**Decision Making** • by consensus • agreement necessary	**Decision Making** • by vote if necessary • agreement necessary

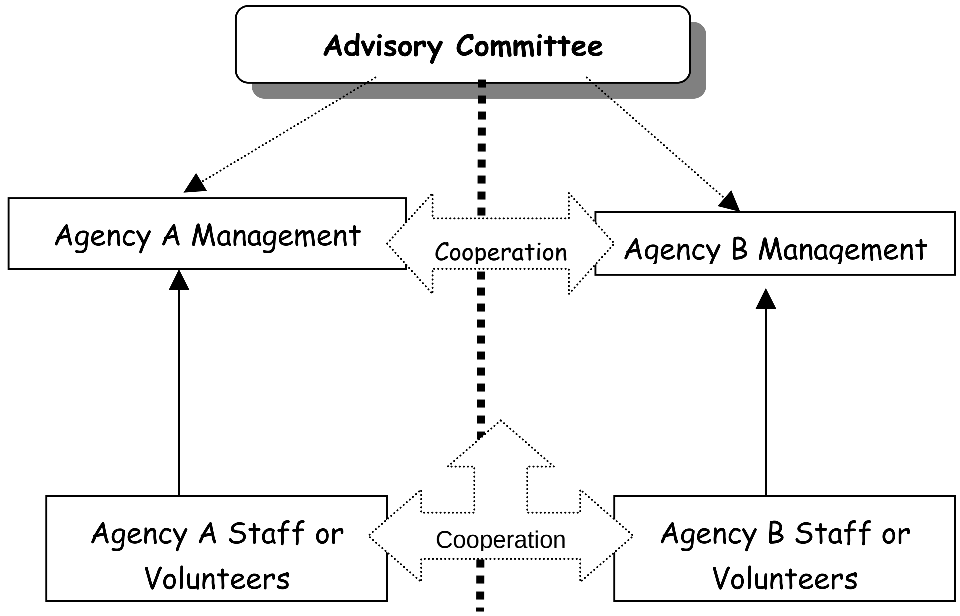
Which approach is right for you?

Which approach is right for the program, given its goals and objectives?

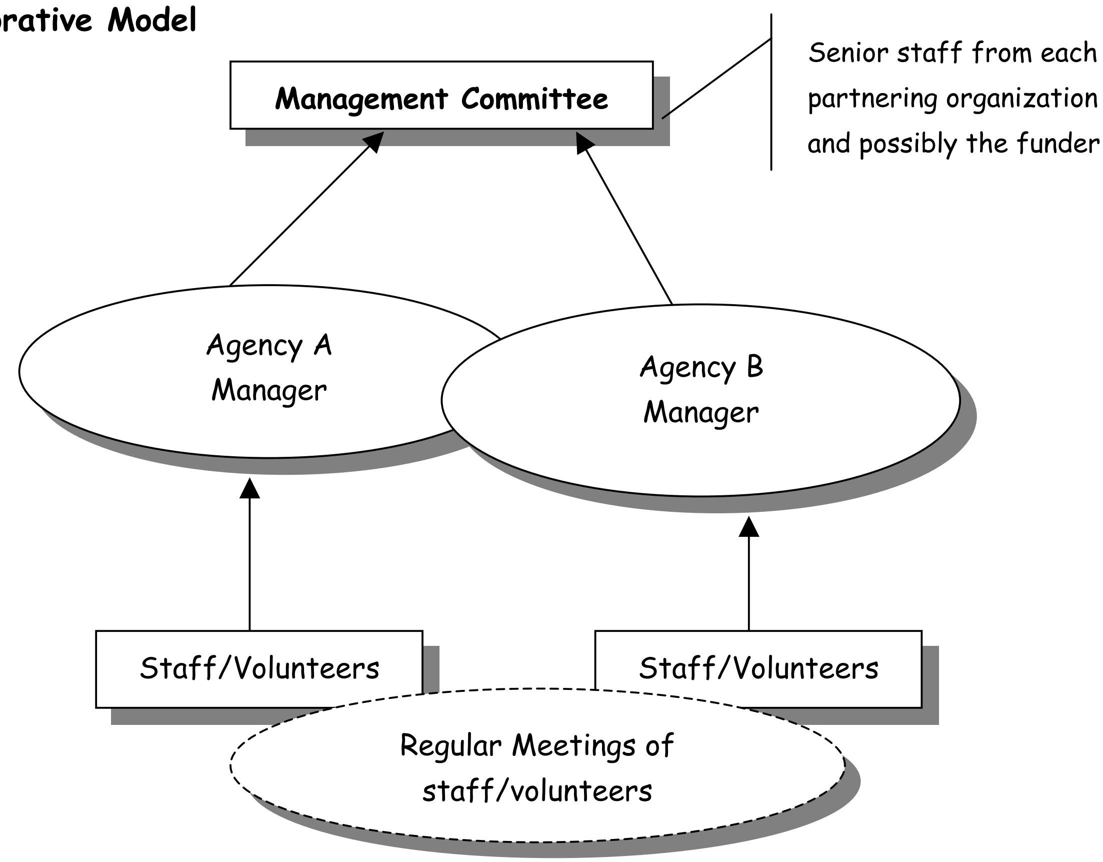
Which approach is preferred by the funder?

Management Models

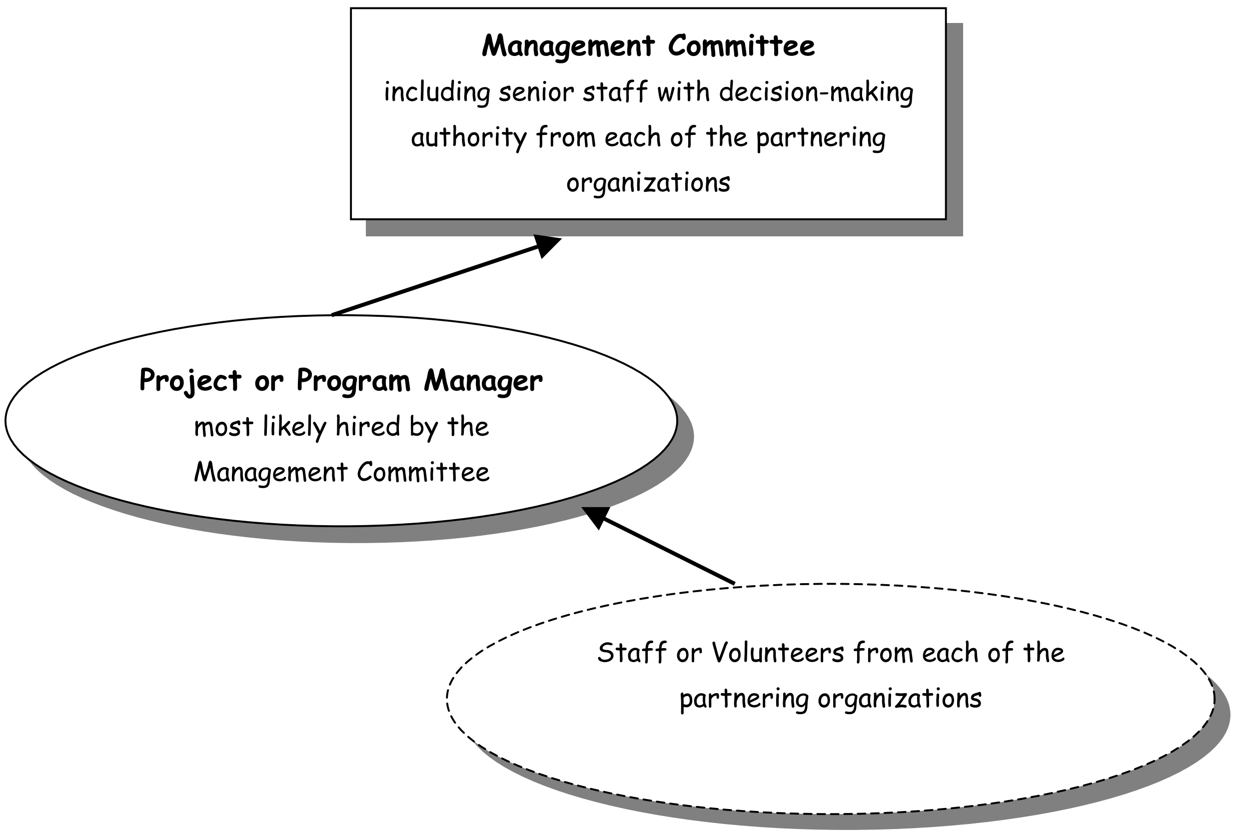
(a) Cooperative Model



(b) Collaborative Model

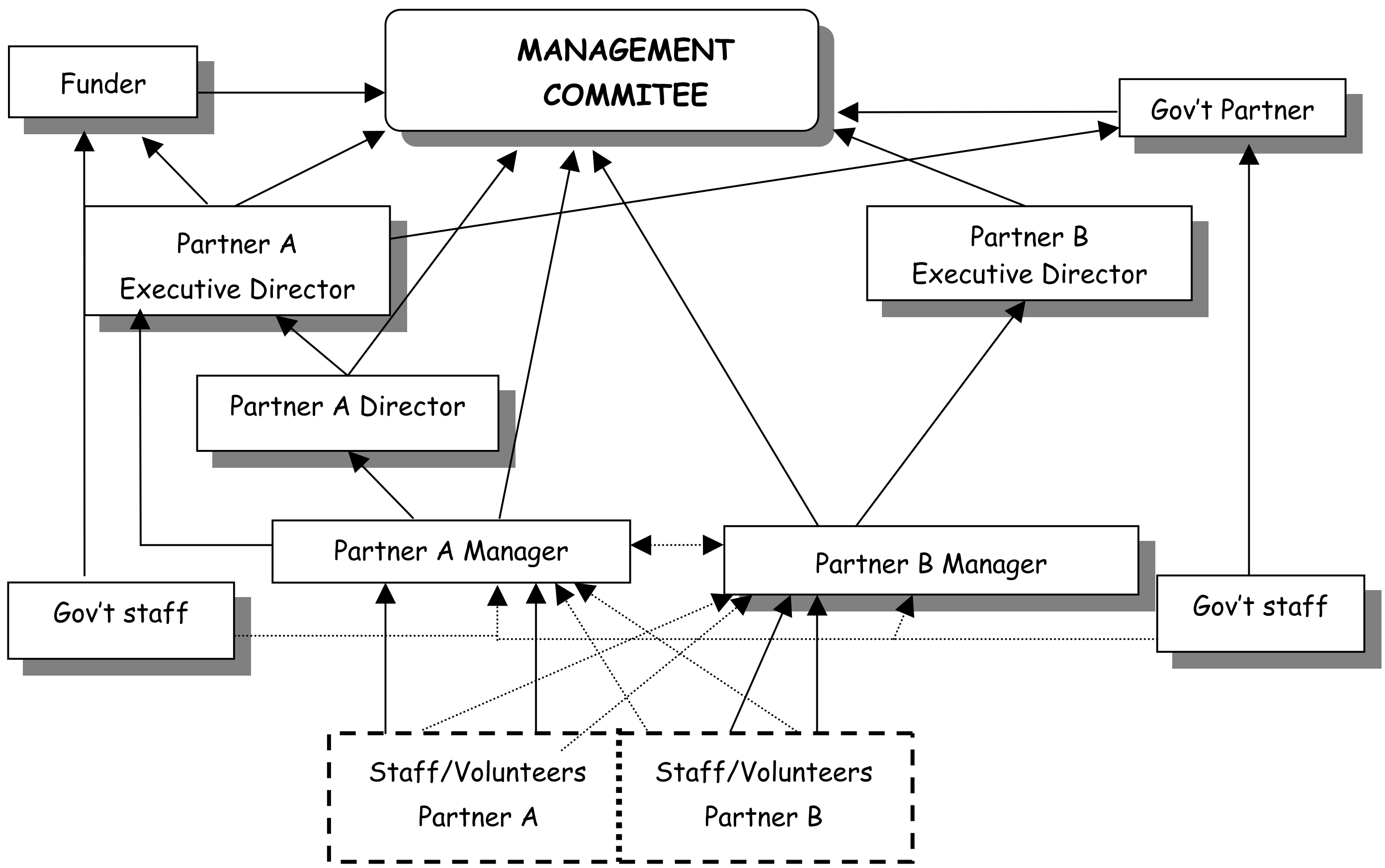


(c) Integrated Model



(d) The "Sure to Fail" Partnership Model

(actual case example of a management model which did **not** work)



Special Challenges for Smaller, Volunteer-Based Organizations

The risks associated with partnerships are particularly acute for small, often volunteer-based organizations that may be obliged – by funders and sometimes by circumstances – to enter partnerships with larger more established organizations. The risks stem from the two organizations having very different resources and power. The risks include:

- being assimilated by the larger group, losing their identity and sense of purpose, and losing also their visibility in their own community. The larger partner may not regard them as equals and may – even unknowingly – marginalize their role in the partnership or in the project.
- losing their own particular way of doing things, for example their way of reaching decisions or settling disputes.
- losing their ability to work in the language of their choice and being able to communicate with their community in this language.
- being intimidated or overwhelmed by the larger organization given its greater resources, its greater experience and its ability to use paid staff.
- being misunderstood because of cultural or linguistic differences.

These risks can be minimized if:

- the larger partner and the funder develop a better understanding of the smaller partner's character and concerns, and are willing to respect its way of conducting business.
- the partnership is based on honest dialogue, a willingness to address issues openly and a process for allowing the smaller partner to be heard.
- the larger partner and funder recognize that smaller organizations have fewer resources at their disposal and commit to building capacity within those organizations.
- the partnership encourages mutual trust and respect, and a willingness to be open to the each other's views and priorities.
- the partnership provides adequate time for partners to come to understand each other's concerns, and to recognize each other's uniqueness and values;
- the partnership ensures that each partner will benefit in tangible ways from the relationship.
- the partners are willing to try new ways of addressing issues or resolving problems.

These all can be built into the management and decision-making process.

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. They have to be reasonably **compatible** however. Are any problems anticipated with regard to the following? If so, what strategy – including discussing the issue openly with staff – will ensure compatibility?

Checklist

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 and 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 cycle			
financial reporting by staff and organization			
use of equipment			
Other			

7. Who will do what to implement the strategies identified above?

Strategy	Person Responsible for Implementation	Time Frame

Remember it is better to take the time at this stage to plan the partnership. Consider the time as an investment that will help you avoid problems down the road.

11. Ensuring Accountability

Accountability reflects people's right
to know what agencies intend to achieve and
whether they have achieved their intentions.

Accountability obliges organizations
to demonstrate and take responsibility
for their performance in light
of agreed-upon expectations.

Purpose

This tool's purpose is to emphasize the importance of accountability within a partnership. It discusses the idea of accountability and provides some ideas for enhancing accountability. As partners decide upon a mechanism for ensuring accountability, they can then built it into their management system and their Partnership Agreement.

What is Accountability?

Accountability is **not** a process of assigning blame and punishing wrongdoing or other inadequacies.

Accountability **is** an opportunity to demonstrate achievements and responsibility.

To be accountable is to be responsible for one's actions.

Accountability means saying "I lost it" rather than "it was lost", or saying "I found it" rather than "it was found."

***Effective* accountability is based upon five principles.**

Principles	How will you embed this principle in your partnership?
Clear roles and responsibilities. In an accountable relationship, partners' roles and responsibilities should be well understood and agreed upon. This clarity is key to an accountable partnership. *What is each partner's role? What are its responsibilities?*	
Clear and realistic expectations. Expectations have to be clear, reasonable and realistic. You cannot be expected to achieve something – and be responsible for achieving it – if it is entirely unrealistic. *Are the partners' expectations reasonable and realistic?*	
Expectations balanced with resources. Expectations need to be realistic relative to the resources (authority, skills and funding) available to each partner. A partner likely cannot achieve its objectives if it does not have adequate resources for doing so. *Do you have the resources that you need to do the job?*	
Credible reporting. Credible, useful and timely information should be provided in order to demonstrate what has been achieved. Reporting can be ongoing, periodic or both. *How will you report on your activities and accomplishments?*	
Reasonable adjustment. After reviewing their performance relative to expectations, partners should be prepared to learn from the review and to adjust their activities and their partnership accordingly. If you did not achieve your objectives, why not? This is a matter of "closing the loop." *How will you implement what you have learned?*	

To whom are you accountable?

Accountability implies a contract – between clients and service providers, between funders and service providers, between partners providing a service and between a partner and its own Board of Directors. Each has rights, responsibilities and obligations for which they are accountable.

Accountability	Accountable to …	Indicators
For achieving the program's objectives	• clients • funder • Board of Directors • community	program statistics on services provided and accomplishments
For program expenditures	• funder • partners • Board of Directors	financial records supported by appropriate receipts proper signing authorities
For being part of a team	• partner	fulfilling the responsibilities identified in the Partnership Agreement

Accountable for What?

In a partnership, the partners are accountable for achieving their **objectives**. Objectives, therefore, should be specific, practical and measurable. Otherwise how will you know what you intend to achieve and whether you are achieving it?

We want to be accountable for results not activities. Being busy is not good enough. Objectives, therefore, should focus on outcomes and results rather than activities. They should state specifically **what** you will achieve rather than **how** you will work or what you will do. Because you will be held accountable, your objectives had better be **SMART**.

Objectives should be SMART, i.e.
- **S**pecific
- **M**easurable
- **A**chievable
- **R**ealistic
- **T**ime-Targeted

Which of the following is a well-stated objective and why?

Our objective is:

- *twenty-five single parent families with improved parenting skills.*
- *to provide lessons in parenting skills to single parent families in the city.*

How will you know when you have achieved these two objectives?

Partners are also accountable for their **expenditures** and **financial management practices**. Being accountable means being able to answer each of these questions:

- *How much did we spend?*
- *On what did we spend the funds?*
- *Are all the expenditures properly authorized, in accordance with the agency's standard practices?*
- *Do we have receipts for all the expenditures?*
- *Did all our expenditures respect the contract's terms and conditions?*
- *What did we achieve as a result of these expenditures?*

Accountability Reporting

We now know both **to whom** we are accountable and **for what** we are accountable. Accountability requires agencies to report on their activities. At a minimum, the report should answer these three questions:

- did we do **what** we were supposed to do?
- did we do it **how** we were supposed to?
- did we **achieve** what we were supposed to achieve?
- if we did not achieve what we said we would, **why not**?
- what will or should we do **differently** in the future?

How to report?

Your agency can report in any or all of the following ways. "How" will depend on your own requirements defined by the funder, by your own organization and by your partner's organization.

(a) regular progress reports
(b) monthly, quarterly or annual financial reports
(c) a year end (or project end) report on activities, accomplishments and shortcomings including a section on what should be done differently to improve the situation in the future
(d) client satisfaction surveys
(e) a program review or evaluation

You probably will want to share these accountability reports with your Board of Directors, funders and staff. You may want to make the report available to clients and the public, particularly if public funds went into your partnership.

12. A Model Partnership Agreement

Purpose

Partnerships present certain challenges. It can be difficult to work together when partners have very different organizational cultures, mandates, priorities or practices. Personality, language and cultural differences can all complicate the partnership.

A **Partnership Agreement** is like a rule book or a guide book. It defines how partners will work together. It can be used to outline who will responsible for what, who will report to whom, how services will be provided, how decisions will be made, how the funding will be shared, etc. It is not legally binding but it might offer some measure of legal protection if a partner became involved in a law suit.

This tool includes two model Partnership Agreements that organizations can use when entering into a relationship. The first Agreement would work best for partnerships of limited duration that do not involve very much funding. The second model is much more detailed and could be used for more complex, long-term partnerships that involve a significant amount of funding. Agencies using this tool will want to modify the agreements so they better suit their own particular needs and circumstances.

Partners could attach their Agreement either to their funding proposal – to indicate how well prepared they are – or to their contract with the funder in order to clarify who will be responsible for what.

Model 1 – for Partnerships with Limited Scope

For partnerships with a very small budget and a limited mandate, a simple **Letter of Understanding** can establish the ground rules. This letter could identify – simply and briefly – **who** is involved, the partnership's **purpose**, a statement of **who is responsible for what** and an outline of **how the funds will be distributed** among the partners.

One example is given on the following page. The partnership involves two agencies – *Vancouver First* and *Community Building Services* – who are co-hosting a two-day conference providing training in building and sustaining effective partnerships.

Letter of Agreement, May 8, 2001

Our **agencies**, Vancouver First and Community Building Services, have committed to work together as partners. Our **goal** is to organize, host and facilitate a day-long workshop that will provide partnership training to not-for-profit agencies operating in British Columbia. The workshop will take place on **May 31, 2001**.

Vancouver First will be **responsible** for:

(a) securing funding for the workshop and for the project's financial administration;
(b) facilitating the workshop;
(c) recording the workshop proceedings;
(d) issuing a press release on the workshop, giving appropriate credit to both host organizations; and
(e) preparing a final report on the project and providing copies to the funder.

Community Building Services will be **responsible** for:

(a) securing meeting space for the workshop;
(b) ensuring that the meeting space is appropriately arranged on the day of the workshop and that flip charts, projectors and other equipment is available as required;
(c) identifying and inviting participants; and
(d) providing refreshments and other logistical support as required.

The project's budget is $5,000. Vancouver First will receive $2,000 and Community Building Services $3,000 to cover all the expenses associated with their responsibilities. The Executive Directors of the two organizations will together, by consensus, finalize the invitation list and be responsible for all other management decisions.

Signed:

__________________________	__________________________
Executive Director	Executive Director
Vancouver First	Building Community Services

Model 2 – For More Complex Partnerships

Partnerships with a larger budget, a fuller mandate and a longer life span should be guided by a more formal **Partnership Agreement**. This should identify:

- who is involved and why they are working together;
- the partnership's vision, goals and objectives;
- the relationship among the partners;
- roles and responsibilities;
- organizational structure and reporting relationships;
- financial administration;
- dispute resolution; and
- termination.

Senior people with each partnering organization should sign the Agreement and share it with their funders and staff.

Partnership Agreement

1. Introduction

The following represents a Partnership Agreement between *(legal name and address of each partner)*. The Agreement's purpose is to clarify our relationship thereby enabling us to work together in a cooperative manner.

The partnership will be for the period from *(begin date)* to *(end date)*. The Agreement may be modified at any time if both partners agree to the changes.

We have chosen to work together, as partners, rather than separately because:

- ☐ funding is conditional upon partnering.
- ☐ to achieve administrative savings.
- ☐ to provide better service to clients.
- ☐ to learn from each other.
- ☐ other:
  - ☐ ____
  - ☐ ____
  - ☐ ____

2. Vision, Goals and Objectives

As partners, our vision for this project is:

> *A vision describes what you want to see in place some years down the road. It is a picture of the future.*

As partners, our goal for this project is:

> *If a vision paints a picture of the future, the goal identifies what it will take to make the vision a reality. A goal is a broad statement of what you want to achieve.*

As partners, our objectives for this project are:

*Objectives should be specific, measurable and practical so that you know what you want to achieve and whether you are achieving it. They should focus on outcomes and results rather than activities, i.e. on **what** you will accomplish rather than on **how** you will work or what you will do.*

Objectives should be SMART, i.e.:

Specific
Measurable
Achievable
Realistic
Time-Targeted

We will measure our progress toward these goals and objectives – and we will evaluate our success in achieving these – on the basis of the following indicators. *("Indicators" are measures that we can use to determine whether or not we have achieved our objectives.)*

Objectives	Indicators
Sample objective: improved parenting skills among 30 young single parents at risk of child protection intervention	• *number of parents involved* • *number and range of activities offered* • *fewer interventions through the course of a year by the Ministry of Children and Families*
	•
	•
	•

3. Relationship

This section will help to ensure that each organization understands the other and is prepared to accommodate whatever differences may exist in their respective organizational cultures.

(Name of each partner) are distinct organizations each with its own vision, mandate, priorities, organizational culture and operational practices. We recognize that these differences can create conflict in a partnership. Therefore we want to identify both our differences and the measures we will take to minimize their impact.

*(The following are **examples** of differences that could exist within a partnership and of the measures the partners could take to minimize the impact of these differences.)*

Differences

- ☐ one organization has more formal reporting systems for staff than the other does.
- ☐ one is strongly committed to political action and advocacy and the other to political neutrality.
- ☐ one employs formal accounting practices and cannot modify these for any program in which it is involved, while the other operates more informally.
- ☐ one serves all people while the other focuses on a particular cultural community.
- ☐ other:
  - ☐ ______________________________
  - ☐ ______________________________

Measures we will take to reduce the impact of these differences:

- ☐ the partners' Chief Financial Officers will define a process for financial reporting.
- ☐ the contract holder will prepare a consolidated revenue and expenditure statement clearly identifying which agency will receive what funding for which purposes.
- ☐ staff or volunteers will report to supervisors within their respective organizations and will continue to receive all the monetary and other benefits associated with their respective organizations.
- ☐ the two partners will explore the potential to learn from each other's experiences. The partnership will support such training as is required to ensure its effective operations.
- ☐ other:
  - ☐ ______________________________
  - ☐ ______________________________

4. Roles and Responsibilities

Describe who will do what in the partnership, who will be responsible for what, who will report to whom and how the partnership and its activities will be managed. For example:

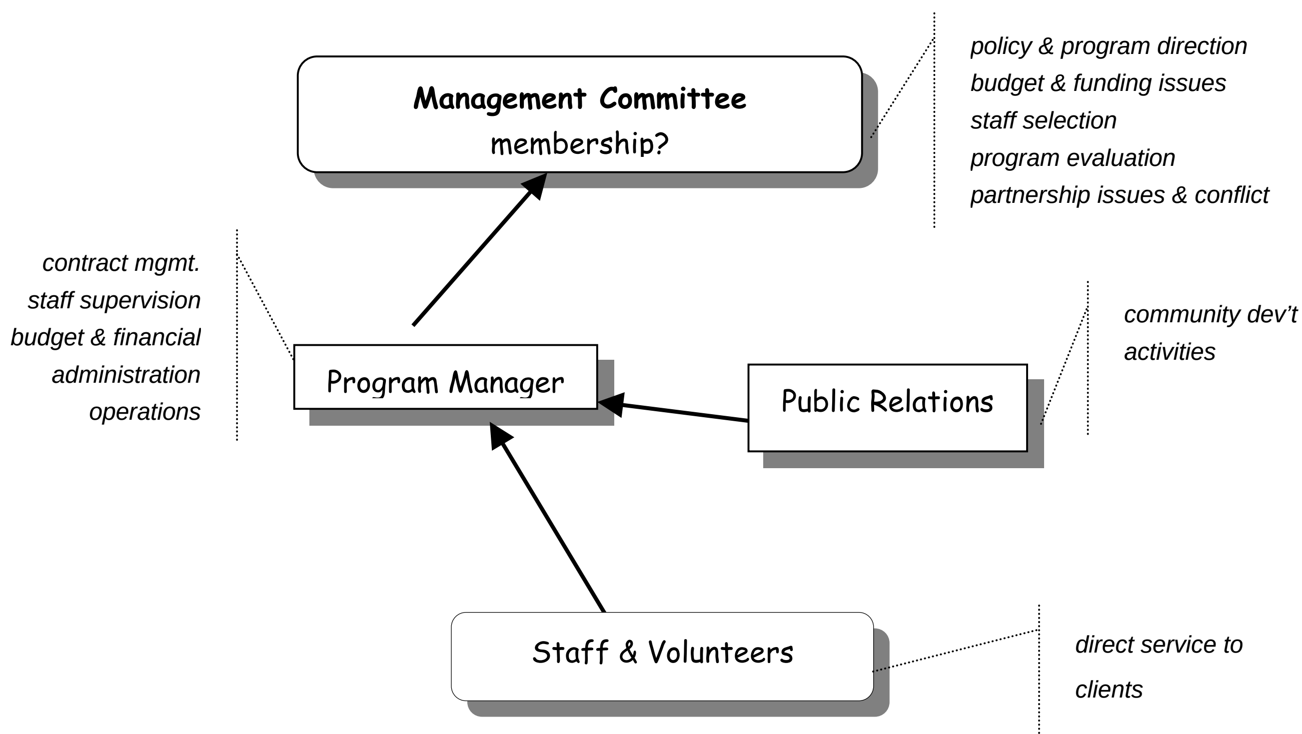
- ☐ *who will sign the contract with the funder?*
- ☐ *who will prepare program reports for the funder? Will the other partner or the Management Committee review these reports prior to their being given to the funder?*
- ☐ *who will prepare financial reports for the management committee and the funder?*
- ☐ *who will pay the bills? How will invoices be submitted? What documentation is required before invoices are paid?*
- ☐ *who will provide office space and equipment?*

- ☐ *how will staff or volunteers be selected? Who will hire and train the staff? Who will supervise them?*
- ☐ *what role with volunteers play in the project? Who will organize, train and supervise the volunteers?*
- ☐ *how will volunteers and staff relate to one another?*
- ☐ *will there be a Management Committee and, if not, how will the partnership and the program be managed?*
- ☐ *if there is a Management Committee, who will be on it? How often will it meet? Where will it meet? Who will chair the meetings? What will its responsibilities be?*
- ☐ *how will the partnership and the program be evaluated? By whom? When?*

The more detail you include, the less opportunity for misunderstandings.

5. Organizational Structure and Reporting

It is always useful to include an organizational chart indicating who is responsible for what and who is reporting to whom. The "org chart" does not have to be complicated.



6. Financial Administration

Differences often arise about money and expenditures. Therefore it is useful to include the following in order to minimize the risks to each partners.

The contract with the funder will be signed by *(name of contract holder)* on behalf of the partnership. The total amount of the contract is *(amount provided for in the contract)*. Funding within the partnership will be distributed roughly as follows.

Budget Item	Total Budget ($)	Amount, Partner 1	Amount, Partner 2
Personnel			
Management			
Supervisors			
Staff salaries & benefits			
Expenses associated with volunteers			
Total personnel			
Expenses			
Staff/volunteer training & development			
Travel			
Management Cmtee. mtgs.			
Space rental			
Furnishings & equipment			
Supplies			
Upkeep & maintenance			
Management Administration fee			
Other			
Total expenses			
PROJECT TOTAL			

The partners recognize that the contract holder bears the most significant legal and financial risks in this relationship. For sake of clarity, the partners affirm that each:

- is an independent organization acting together only within the terms of this Partnership Agreement;
- cannot be directly responsible, beyond the reporting terms identified above, for the expenditures or actions undertaken by the other;
- will establish time records and books of account, invoices, receipts and vouchers of all expenses in accordance with standard accounting practices;
- will permit the funder, at all reasonable times, to inspect, review and copy all time records and books of account, invoices, receipts and vouchers; and
- will not, without the prior written consent of the funder, assign either directly or indirectly, any responsibilities assigned under the Contract or this Partnership Agreement to a subcontractor or other third party.

It is further agreed that:

- the Management Committee is not the legal employer of staff;
- consolidated revenue and expenditure forecasts will be prepared every three months and will provide a framework for the project's financial administration;
- any expenditure of more than *(dollar level)* will require the approval of the management committee;
- the (*name of partner*) will receive *(identify an appropriate percent, if applicable)* of total value of the contract to defray the costs associated with its administrative, accounting and audit responsibilities;
- the (*name of partner*) will receive *(identify an appropriate percent, if applicable)* of the total value of the contract to defray its administrative costs.
- the contract holder's Chief Financial Officer will pay all invoices promptly, in accordance with its standard procedures in this regard;
- staff will be paid by their respective organizations in accordance with the procedures in place for such purposes;

- the project's financial records will be audited by *(name of auditor or accountant); and*

- *each organization's conflict of interest provisions will apply to this project.*

7. Dispute Resolution

The partners are committed to working in a cooperative manner and recognize that this requires a commitment of time and energy. Where differences arise, the partners agree:

- to address their differences in a timely, open and honest manner;

- to attempt to resolve issues at the staffing level at which they occur;

- to bring those issues which cannot be otherwise resolved to either a regular or a special meeting of the Management Committee;

- to consider whether to involve the funder in efforts to resolve the differences; and

- if appropriate, to engage an independent mediator or evaluator to assess the partnership and/or the situation either when required or as part of a formal evaluation.

8. Evaluation

As outlined in Section 4, the Management Committee will arrange for the project to be evaluated in a professional manner, based on the objectives and indicators identified in Section 2.

9. Dissolution in Cases of Dispute

The partners acknowledge that their relationship is no longer be viable and may be detracting from their efforts to achieve the program's goals and objectives. If such occurs and the issues cannot be satisfactorily resolved following the process identified in

Section 7 above, the partners agree to dissolve the relationship, **honourably and without acrimony**, following:

- Management Committee discussion of the situation and of alternatives to the current arrangements;
- notice being served, in writing, to other members of the Management Committee and to the funder; and
- a transition period of (*number of)* months.

At termination the Management Committee will:

- identify the partnership's major accomplishments and acknowledge those people and organizations who have contributed to these accomplishments;
- determine how to inform people - both inside and outside the partnership – of the decision to terminate;
- document the partnership's history and the lessons which can be drawn from its operations;
- recommend an appropriate alternative to the current partnership; and
- select a time, place and event to celebrate what has been accomplished and to move on.

10. Dissolution

At project completion, the partners will prepare a final report on their partnership. It will include the following.

Partnership Final Report

Issues	***To be completed by the partners:***
When was the partnership initiated? What were its goals and objectives?	• • •
What were the partnership's major accomplishments?	• • •
Who contributed to these accomplishments?	• • •
What lessons can we learn from the partnership's successes?	• • •
What lessons can we learn from the partnership's shortcomings?	• • •

At dissolution, the partners will:

- ☐ inform the funder, in writing;
- ☐ provide copies of the final program and financial report to the management committee, funder and others as appropriate;
- ☐ organize the files and other records so the project and partnership's history is not lost;
- ☐ inform all stakeholders, including Boards of Directors, staff and clients as appropriate; and
- ☐ host a "moving on" celebration for partnership staff, managers and funders.

11. Signatories

Signed this day of , by:

on behalf of *(name)* (funder)

on behalf of *(name)* (contract holder)

on behalf of *(name)* (other partner)

13. Legal and Liability Issues

Purpose

Partnerships are most often created with the best of intentions: to better serve the community, to build relationships, to mentor and to learn. But "best intentions" alone are not sufficient to protect agencies from the legal liabilities that could arise when things go wrong.

The purpose of this tool is:

(a) to identify some of the legal and liability issues that may arise in a partnership; and

(b) to identify some measures for reducing your risk and limiting your liability.

Importantly, however, if your organization has any concerns in this regard, it would be best to consult a lawyer.

Overview

In a partnership, your organization – and its Board of Directors – could be at least partially liable if your partner's activities result in a law suit. Additionally if your partner's actions generate a law suit and your partner then dissolves or disappears from the scene, you could be fully liable for its actions.

What actions – or omissions – could result in a law suit?

- sexual harassment by or of staff
- discriminatory actions
- wrongful dismissal
- negligence in carrying out one's responsibilities
- failure to act in a professional manner
- misappropriation of funds

"An Ounce of Prevention …"

Unfortunately there is nothing you can do to **fully** protect yourself against a law suit. What you want to do is minimize your risk by ensuring, first, that you have appropriate policies in place and, second, that your staff are well trained and understand the need to act in a professional manner. Keep in mind that the best action is prevention!

You can reduce the risk of liability and law suits with the following.

- ☐ If your organization relies on volunteers, consult the publication *Volunteers & the Law* prepared by the People's Law School in Vancouver (2000). It is available from:

  The Law Foundation of BC
  1340 – 605 Robson Street
  Vancouver, BC V6B 5J3
  Telephone: (604) 688-2337
  Email: lfbc@telus.net

- ☐ Ensure your organization has access to a lawyer who can advise you when need be. Perhaps there is a lawyer on your Board who is willing to help in this way.

- ☐ Subcontract rather than partner with the other agency. Lawyers like this approach because it may limit your liability. However in most case it will not be a practical alternative for agencies who want to work together as equals.

- ☐ Make sure that both you and your partner have appropriate and adequate liability insurance. Your agency should also have liability insurance for members of its Board of Directors since they can be held personally liable. You may have to include this cost in your funding proposal.

- ☐ Ensure that your partner is reliable and professional, and has a track record that allows you to be reasonably confident that nothing will go wrong. You may want to "start small" and let your first partnership with this organization be limited in scope. As you grow more confident of each other's professionalism, you can expand the scope of your joint activities.

- ☐ Have clear policies and procedures for staff and volunteers. The policies should cover areas such as privacy and confidentiality, sexual harassment and performance standards. Where appropriate, staff should be obliged to respect practice standards and the code of conduct of their own professional association.

- ☐ Ensure that your hiring policies are clear and are respected within the partnership.

- ☐ Ensure that the partnership has appropriate means for ensuring financial accountability. Ensure that expenditures are approved and receipts provided.

- ☐ Provide staff and volunteers with training. Make sure they know what they can and cannot do as part of their job. In some cases if they are working with children, make sure they understand they have a legal responsibility to report cases of suspected abuse. You may also want – or be obliged to – conduct criminal record checks on staff who work with children or other vulnerable groups.

- ☐ Have a clear Partnership Agreement that identifies who is responsible for what and how the activities will be carried out.

14. Effective Internal Communications

Purpose

The purpose of this tool is to assist partners achieve honest, open and effective communications within the partnership.

Every partnership should agree to a formal process for ensuring effective internal communication. In addition, partnerships should pay close attention to how they communicate informally, referred to below as verbal communication.

This tool provides tips for both formal and informal communication.

1. **The Importance Of Effective Communications In A Partnership**

2. **Tips For Ensuring An Effective Internal Formal Communications Process**

3. **How To Develop An Internal Communications Plan**

4. **Tips For Ensuring Effective Informal (Verbal) Communication**
   - **A. Communication Barriers**
   - **B. Checklist of Do's and Don'ts**
   - **C. Communications Skills Chart**

1. The Importance Of Effective Communications In A Partnership

Effective communication is important in a partnership because it:

- Keeps people informed about what is going on
- Establishes trust
- Creates a more productive environment
- Promotes a more friendly and satisfying working relationship
- Avoids conflict
- Enhances commitment to the partnership
- Helps partners achieve their objectives
- Leads to providing better service

Open, honest, direct and positive communication is critical to the success of the partnership

2. Tips For Ensuring An Effective Internal Formal Communications Process

Every partnership should identify a formal internal communication process to ensure information is effectively communicated within the partnership.

To ensure an effective internal communication process that will support the partnership, the following should be considered:

- Establish a communication plan and process. Good communication among partners does not happen unless there is a plan in place and a process has been identified to support the communication.
- Identify who is responsible for communication between the partners.
- Develop an internal communications plan. (See Section 3 below for steps in developing a communications plan.)
- Identify what information needs to be shared and with whom.
- Keep information limited to what is needed, when it is needed and given to who need it.
- Identify when information is to be shared (daily, weekly, monthly, etc.)
- Select the best methods for sharing information. For example, when is written communication to be used and in what format, when are electronic methods most appropriate, and when is face-to face communication essential.
- Document results of meetings- what has been agreed to and what decisions are required.
- Develop a mechanism to obtain feedback and input from staff and volunteers through out the organization.
- Be honest, open and flexible with the processes and methods selected.

3. How To Develop An Internal Communications Plan

Outlined below are the elements of an internal communication plan. Note that these elements are similar for developing a communications plan directed to external audiences.

Analyze the Situation

- Clarify if there is an atmosphere of trust.
- Determine if there are unresolved issues.
- Determine who should be responsible to ensure the communication takes place.

Set Communication Objectives

- Clarify the overall purpose of the communication.
- Define what you want your communication to achieve?

Know your Audiences

- Define the individuals and groups you want to reach.
- Know your audiences in terms of their general characteristics, attitudes, and influence.

Identify Key Messages

- Identify the information that different audiences need.
- Develop clear messages for these audiences – you want to make sure you are reaching the right individuals with the right messages.

Develop a Communication Strategy

- Determine what your overall communication strategy is to be, e.g., is it to be formal or informal, ongoing or short term, proactive or reactive?

Identify Communication Activities

- Determine which methods you are going to use to get your messages to the audiences. These may include: face to face communication such as meetings and information sessions; teleconferencing; memos, documents or newsletters; bulletin boards; or e-mail and internet.

- Choose the method which is most appropriate for the information and the audience.

Prepare a Budget

- Internal communications take time and resources and need to be included in budget considerations.

Do an evaluation- Did it Work?

- Assess whether your communication strategies are working and whether the right information is reaching the right audiences at the right time.

4. Tips For Ensuring Effective Informal (Verbal) Communication

The following outlines tips to ensure effective verbal communication among partners. Many misunderstanding arise because of what we say and how we say it. We first need to recognize the barriers to effective communication before we can understand how to deal with them and what skills we require for effective communication.

A. Communication Barriers

A communication barrier is something that prevents us from understanding the meaning of what is being communicated. We assume that the meaning we intend is the same for the person that hears our meaning. However, this is often not the case for many different reasons. Different cultures have different ways of communicating. Also, the tone we use, body language and facial expressions can become barriers to effective communication.

The speaker, the person giving the message:

- Is not clear.
- Seems uncertain and gives an ambiguous message.
- Uses words that are not concise.
- Uses words that may have different meanings to different people. Cultural differences play a large role here.
- Uses different non-verbal cues that have different meanings. For example, eye contact in one culture may be regarded as being impolite, but in another is regarded as respectful.
- Confuses the verbal message with contradictory non-verbal clues such as facial expression, vocal expression, posture, gesture or actions.
- Gives a message that is judging or blaming.
- Gives a message that is patronizing (talking down).
- Gives a message that is defensive.

The listener, the person receiving the message:

- Is distracted.
- Hears through his/her own "filters" that distort much of what is being said. These filters include judging, jumping to conclusions, or avoidance.
- Is dismissive or ignores what is being said.

What other barriers to communication have you experienced?

B. Checklist of Do's and Don'ts (for effective verbal communication)

To communicate effectively, you should:

- ☐ Speak clearly and avoid jargon. Come to an understanding of common terms When groups come together from different cultures and use different languages, this compounds communication problems.
- ☐ Mean what you say.
- ☐ Avoid being defensive, judging, blaming, patronizing (talking down), and placating (agreeing with everything, but not meaning it).
- ☐ Encourage openness, flexibility and cooperation.
- ☐ Avoid conflict or de-escalate any conflict that may arise.
- ☐ Promote a positive approach.
- ☐ Look for common ground or shared understanding.
- ☐ Acknowledge the other person's point of view.

What other ways do you ensure effective communication?

Remember to use both your speaking and listening skills.

When speaking - we are attempting to convey to others our meaning of a situation, thought, feeling or attitude in a clear and concise manner.
When listening - we listen to understand.

Empathy is what we are striving for. Empathy is being able to listen to understand another person's experience. It means being able to translate into verbal skills the speakers willingness, openness and understanding of the other person's experiences.

Say what you mean and mean what you say.
At the heart of effective communication is trust.

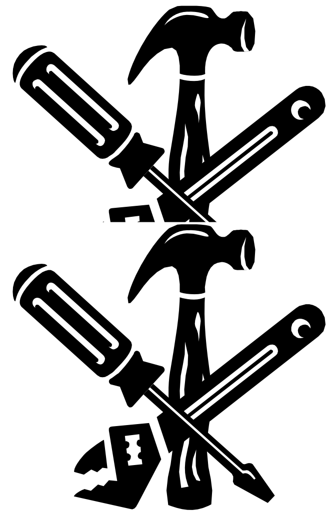
C. Communication Skills Chart

(Taken from *Conflict Resolution, Tenth edition July 1999 Centre For Conflict Resolution, Justice Institute of BC.)*

This chart sets out various verbal communication skills that can enhance a partnership. (While this skills chart has been developed from the basis of the dominant culture, it may be helpful to a wide range of different cultural groups to assist them in understanding and communicating in the dominant culture.)

SKILL	PURPOSE	WHAT TO DO	EXAMPLES
Clarifying/questioning	Get more information	Ask questions	"What do you mean when you say…?
Paraphrasing	Check understanding	Reflect message in your own words	"So what you're saying is…
Acknowledges feelings	Check knowledge and understanding of feelings	Reflect the feelings from speaker's words and manner	"You seem very upset…"
Empathizing	Show understanding of speaker's meaning/feeling	Reflect your perception of speaker's feelings and meaning	"You feel hurt by…"
Summarizing	Pull together key issues	Recap major points	"Let's see what we've covered…"
"I" language	Express your own feelings /thoughts	Describe your experience without judgement	"My experience has been…"
Descriptive language	Describe the behaviour that is part of the conflict	Describe the situation – do not judge	"When you walked away, I…"

15. Promotion and Public Relations



Purpose

The purpose of this tool is to provide partnering agencies with an understanding of the importance of public relations to enhance the partnership activities in the community and to gain credibility and support from the community and funders.

Promotion is important to the partnership in that it provides an opportunity for the partners to be recognized for their efforts and contribution. It provides an opportunity for partners to do joint publicity and obtain an equal share of the credit.

For more information on publicity refer to *The Publicity Handbook*, Health Canada, 1997.

This tool addresses the following issues:

1. **Why Is Promotion Important To The Partnership?**
2. **Tips For An Effective Process For Promotions And Public Relations**
3. **What Is Involved In A Publicity Plan?**
4. **Tips For Making Publicity Successful**
5. **What Are The Different Types Of Publicity?**
6. **Tips On Effective Media Interviews**
7. **Sample News Release**

1. Why Is Promotion Important To The Partnership?

Positive publicity can bring an organization or partnership a great deal of benefit. On the other hand, negative publicity can be detrimental to the reputation of the partnership and each organization.

Promotion provides an opportunity for partners to engage in joint efforts to gain support for their initiative, and profile for the partnership. It provides an opportunity for partners to be recognized for their contribution to the partnership.

Promotions helps the partnership:

- ☐ Establish credibility.
- ☐ Market your initiative to potential clients
- ☐ Gain support of various target audiences and the community.
- ☐ Heighten the profile of all partners involved. It can also provide an opportunity for a smaller organization to obtain recognition for their efforts and contribution to the partnership.
- ☐ Raise funds to support the project by attracting grants, donors, other partners.
- ☐ Attract volunteers and support from other individuals, organizations or businesses in the community.
- ☐ Advocate for change.
- ☐ Recognize funders.

2. Tips For An Effective Process For Promotions And Public Relations

To have effective promotions and publicity, it is important to develop and establish a process. The following should be considered:

- Identify who is to be the official spokesperson for external communication. One person should be designated with a back-up. Partners should identify which partner is to be the spokesperson.
- Develop a publicity plan. Publicity and promotion need to be planned. See Section 3 below for elements of a Publicity Plan.
- Ensure that you have a process to deal with critical issues as they arise. Issues management is needed to ensure the credibility of the partners. If a mistake has occurred, always admit the error, express regret and identify the course of action being taken to correct the situation.
- Ensure that a process is in place to obtain approval from partners and funders on the publicity and promotions to be implemented.
- Ensure that issues of confidentiality are respected and that consents are obtained in personal stories are used in the publicity.
- Determine how partners and funders are to acknowledged and recognized in the publicity.

3. What Is Involved In A Publicity Plan?

Publicity is not a last minute affair. It takes time and careful planning. A publicity plan needs to flexible and dynamic and altered as circumstances change.
A publicity plan should answer the following five basic questions:

WHO are you trying to reach? Know your audience(s) before you develop any publicity strategies.

WHY do you want to reach them? Is it to create greater awareness, increase membership or clients, obtain financial support, recruit volunteers, change policy or a combination of goals?

WHAT is the single most important idea you want to put across to your target audience? What are the other key messages you wish to communicate? You need to develop specific messages for specific purposes to the specified target audience.

HOW are you going to communicate? What is your publicity strategy? What are the publicity activities to be carried out?

WHEN will you carry out your publicity activities? Timing and sequencing are important factors to consider. Will your audience be available? What other competing publicity is going on at the same time?

4. Tips For Making Publicity Successful?

What do you need to do to ensure that your publicity is successful?

- ☐ Develop a budget.
- ☐ Seek out key individuals in the community who have influence and can assist.
- ☐ Recognize that publicity is an ongoing effort, not a one-shot deal.
- ☐ Recognize that media are not the only source of publicity. Informal networks are critical. There are many individuals, groups and organizations in the community that can assist in your publicity efforts, e.g., community centres, churches, service clubs, libraries, businesses including printers, stores, restaurants, shopping malls, etc.
- ☐ Maximize the use of free publicity sources, e.g., public service announcements.
- ☐ Use data to support your messages such as statistical information that illustrates the magnitude of a problem.
- ☐ Use facts. Information must be accurate.
- ☐ Include a human-interest focus or link your publicity to a community concern/issue. Ensure you have consents when using personal stories.
- ☐ Communicate in clear and simple language.
- ☐ Show passion and enthusiasm. The tone and impression your publicity leaves with your audience contributes to its success.

5. What Are The Different Types Of Publicity?

There are a number of key categories of publicity:

Written materials:.fact sheets, news releases, feature stories, articles, media kit
Interviews: print, radio, and television.
The ethnic media and community press are key sources.
Events: press conference or special event where media attends, meetings, workshops, discussion groups, etc.
Electronic: video, web site
People: Leaders in the community, influencers, clients, board members, elected officials, etc.

The following outlines a number of samples of different types of publicity.

FACT SHEETS

- Gives the reader some basic information and background about who you are and what you have to offer. It is usually one page.

NEWS RELEASE

- A news release is a newsworthy item; it is not an announcement.
- The heading should capture the major event or issue.
- The lead- opening line should grab the reader's attention.
- The first few sentences should state in brief what, who, when and where, if applicable. It should use action words.
- The body of the news release should provide background information on the event, issue or organization.
- Use selected quotes that give more credibility to your story.
- See sample new release in section 7 below.

FEATURE STORY

- Link your story with a broader issue or concern in the community.
- Find a human-interest side of the news.
- Catch the readers' attention with an opinion and build to a strong surprising close.

- A story helps to show that your organization or project is made up of real people and this helps create a positive image.

MEDIA KIT

- Helps reporters report on your story more accurately.
- It contains the following:
    - A fact sheet about the issue for which you are seeking publicity.
    - New release about your initiative.
    - Brochure on your organization.
    - Name of your organization, address, phone numbers and contact person.
- Any other information that would further support your case – photos, or other recent clippings.

6. Tips On Effective Media Interviews

Develop a relationship with the media.
Remember, nothing is ever 'off the record".

Do's

- ☐ Call back when you promise
- ☐ Prepare for the interview
- ☐ Be polite and helpful.
- ☐ Be truthful
- ☐ Stick to the facts, do not express personal opinions
- ☐ Put your story or issue in context
- ☐ Be confident – stick to what you know
- ☐ Be in control. If you are uncertain about an answer, repeat the question, change it slightly to give yourself time to think and make the point you want to get across.
- ☐ Have an agenda. Keep returning to your key messages. Give examples to elaborate on your key messages. Don't stray from them
- ☐ Stick to the issue
- ☐ Be on guard. Everything is on record
- ☐ Come across with feeling (but be rationale)
- ☐ Express your appreciation and thanks

Don'ts

- ☐ Don't lie
- ☐ Don't be defensive
- ☐ Don't lose your temper
- ☐ Don't threaten
- ☐ Never answer a hypothetical question – only deal with real situations
- ☐ Don't feel pressured to respond to questions that you do not feel comfortable answering
- ☐ Don't use jargon, abbreviations or complicated language
- ☐ Don't hesitate to rephrase a question if you think it is incorrect

7. Sample News Release

Successful Partnering Means The Mouse Is On The Elephant's Trunk And Not Under Foot.

Small non-profit organizations across BC will gain knowledge on how to partner successfully with larger organizations. Thanks to INVOLVE BC, Ministry of Community Development, Cooperatives and Volunteers, Multiculturalism BC, Canadian Heritage, the United Way of the Lower Mainland and the City of Vancouver, training in successful partnering will be provided through a series of workshops throughout the province.

MOSAIC, a non-profit society that supports immigrants and refugees and Nisha Family and Children Services Society, a non-profit society serving disadvantaged youth, individuals and families have taken the lead in establishing a Collaboration Roundtable of volunteer agencies seeking to reach out to small and ethno-cultural organizations to assist them in improving their partnership relationships.

As a result of this Collaboration Roundtable workshops on successful partnering will be held in Vancouver, Victoria, Prince George, Kamloops and Cranbrook.

"The purpose of these workshops", said John Coward of Nisha Family and Children Services Society, " is to provide practical training and build a partnership tool kit to meet the needs of small or ethnocultural organizations wishing to sustain effective partnerships."

"Our aim", added Eyob Naizghe, Executive Director of MOSAIC, " is to show how responsibility, power, visibility and credit can be equitably shared when small, volunteer-based organizations partner with large and more professional organizations. We want to ensure that small ethnocultural organizations avoid being absorbed and assimilated when working in partnership with large mainstream and multicultural organizations."

More information on the partnership workshops can be obtained by contacting Eyob Naizghe of MOSAIC or John Coward of Nisha Family and Children Services Society.

-30-

16. Resolving Conflict

(The information below is adapted from Conflict Resolution, Tenth Edition, Centre of Conflict Resolution, Justice Institute of BC.)

Purpose

The purpose of this tool is to provide partnering agencies with an understanding of strategies and processes for resolving differences and alleviating conflict within a partnership.
While some conflict may be positive, allow for airing of views and build new understadnings, conflict can be detrimental to a partnership.

Outlined below are tips for resolving conflict informally. All partnerships should have a formal process in place to resolve conflicts that cannot be dealt with on an informal basis.

This tools addresses the following issues:

1. **Types Of Conflicts**
2. **How Power Affects Conflict?**
3. **Tips For Resolving Conflict Informally**
4. **Formal Process For Resolving Conflict**

1. Types Of Conflicts

It is important to understand the types of conflict that exist to assist in resolving the conflict.

Types of Conflict	Sources of Conflict
Communication conflicts	Misunderstandings, assumptions, lack of information, misinformation; different languages
Structural conflicts	Poor processes, inappropriate structures or systems, time constraints
Relationship conflicts	Stereotypes, fear, distorted perceptions, unrealistic expectations, use of power, male/female differences; personal conflicts
Interest conflicts	Differences in needs, interests and preferences
Value conflicts	Opposing beliefs, views, values or philosophies. This can stem from cultural differences of individuals or groups; cross cultural conflicts

Can you identify any other types of conflicts?

Understand the possible types of conflict will help you recognize when conflict is occurring. There may be warning signs, such as missed meetings, low morale, activities being delayed or not finished, etc. What other warning signs are you aware of?

2. How Power Affects Conflict?

- Power can be defined as the degree to which we are able to advance our own goals and influence others.
- Power is largely a matter of perception - how we perceive our own power and how our power is viewed by others.
- Power is dynamic rather that static in that power relationship between people in conflict shift throughout the conflict.
- Power can be used constructively to lessen conflict or destructively to increase conflict.

If You Recognize You Have More Power – What Can You Do?

- ☐ Select a location most comfortable to other party to work through the conflict.
- ☐ Share resources that you have such as information, expertise.
- ☐ Be willing to listen to the other party first – genuinely listen.
- ☐ Speak in a friendly, welcoming and open manner.
- ☐ Do not intimidate or retaliate.
- ☐ Respond non-defensively.
- ☐ Seek a "level playing field" so that the process feels fair to both parties.
- ☐ Back off from your position and be willing to look at a variety of ways to meet the needs of both parties. Look for alternatives.
- ☐ **What else can you do?**

If You Believe You Have Less power - What Can You do?

- ☐ Find ways to increase your own power and influence and lessen your dependence on the other party's source of power.
- ☐ Identify your own resources and skills.
- ☐ If timing affects the balance of power, consider waiting for a time that may work better.
- ☐ Bring the power imbalance into the open and discuss it with your partner.
- ☐ Assert yourself and continue to keep your interests on the table, while continuing to listen and acknowledge the other party's interests.
- ☐ If asserting yourself results in the other party exerting his or her power over you, shift temporarily from a focus on your own interests to a focus on the other party's interests.
- ☐ Ask an outsider to assist, if you cannot deal with it on your own.
- ☐ **What else can you do?**

3. Tips For Resolving Conflict Informally

1. All attempts should be made to resolve conflict informally.

2. Any conflict that arises should be resolved in a timely manner.

3. It is important to recognize that different individuals and groups have different ways of dealing with conflict. Some groups deal with conflict by avoiding it and removing themselves from the situation.

1. The following outlines ways to deal with specific types of conflict:

Conflict type	**Ways to resolve**
Communication	- define terms - clarify assumptions - check interpretation of information
Structural	- design process to satisfy both parties - adjust timelines and deadlines - analyze the context of the conflict
Relationship	- show concern for others point of view - remain non-defensive / non-judgmental - keep emotions in check - check power imbalance
Interests	- de-emphasize position - look for common interests - be ready to accommodate and compromise
Values	- look for common goals/values - acknowledge value differences - show respect for differing value systems

What other ways are there to resolve conflict?

Both internal and external elements work together to resolve conflict.

The **internal elements** deal with how people think and feel about the conflict and each other.

The **external elements** are the actions, words, and non-verbal messages given to others in the process of resolving conflict.

Checklist of Internal Elements

- ☐ **Awareness** – Are you aware of or your own and the other party's perceptions, feeling, values, beliefs, fears, concerns, assumptions, expectations with regard to the conflict?

- ☐ **Readiness** - Are you prepared to resolve the conflict? Are you sensitive to the readiness of the other party? Is the timing right? Are you emotionally and psychologically ready? Are you in a frame a mind that is ready to resolve the conflict?

- ☐ **Understanding** – Have you shifted toward a better understanding of the conflict? This shift includes:
    - Being open and willing to acknowledge the other person's experiences
    - Withdrawing judgement
    - Seeking new information
    - Allowing new information to influence you
    - Being able to accept differences
    - Looking for and building on similarities and common ground

- ☐ **Reflection** – Are you able to absorb all that has gone on and to step back and look at the "big picture"? The purpose of reflection is to learn from the conflict and gain skills and abilities to deal effectively when a new conflict arises.

Checklist of External Elements

- ☐ **Initiating - Have** you taken an action to approach the other party for the purpose of resolving the conflict?
  - Initiating involves a certain amount of risk.
  - Be responsive to the other person's readiness and reaction to your approach
  - Check the style of your approach. Being assertive may cause defensiveness. This should be balanced with empathy

- ☐ **Framing** – Have you described the conflict in a way that would promote a more collaborative climate and expand thinking?
  - Shift from stating a position (e.g., I want or I do not want) to expressing an issue or interest (e.g., I would like to discuss…)
  - Depersonalize the conflict (e.g. you have caused a lot of problems with the way you have restructured to this restructuring process is a difficult one.

- ☐ **Exploring** – Have you explored ways to reach a new understanding of the conflict and the other party?
  - Learn what underlies the dispute
  - Understand the nature of the conflict
  - Understand the knowledge, interests, needs, values and beliefs of both parties
  - Work through differences without judgement and blame

- ☐ **Closure** – Have you changed the way you feel about the other party and resolved the issues in the dispute? **True closure occurs when both the "heart" and "head" have let go of the conflict.**

4. Formal Process For Resolving conflict

If informal processes have been unsuccessful in dealing with conflict, more formal processes will need to be used. All partnerships should identify formal processes for resolving conflict. This should be identified in the partnership agreement.

Formal process should include:

1. Collect the required information to deal with the conflict.

- Develop team building exercises.

2. Identify a person within the partnerships that has the skills to deal with conflict situations. If such a person is not available, identify a person outside the partnership to act a mediator. A third party may be more objective and effective. Determine if your funder can assist.

3. Ensure the person selected is credible and approved by all parties to the conflict.

4. Document results of the mediation.

5. Communicate results to the partners to ensure there is agreement.

17. Dissolving Partnerships Honourably

Partnerships allow organizations to combine their resources and build on their respective strengths. They allow organizations to compensate for their weaknesses. They provide an opportunity to learn from each other.

Partnerships usually come to an end at some time. Most often, they end because they have reached their objectives or have gone as far as they can toward their objectives. Sometimes they end because there is no longer funding to allow their work to continue. Sometimes they end because the organizations are so different that they simply cannot work together any longer.

At that time, partners have two choices:

(a) they can let the partnership simply fade away and disappear; or

(b) they can dissolve the partnership in way that acknowledges their accomplishments and sets a foundation for working together again in the future.

Purpose

The purpose of this tool is to outline a process for dissolving a partnership in an honourable way.

In cases of conflict …

1. The dissatisfied partner(s) should provide written notice of its (their) intention to dissolve the partnership. The letter should outline its reasons in some detail although it should attempt to be positive rather than acrimonious or bitter in tone.

2. The partners – or the funder if it is involved – should organize a special meeting of the Management Committee to consider the notice. The meeting should take place within one month of the funder receiving the letter identified above.

3. The Management Committee should explore whether there is any way to repair the differences or any alternatives to dissolution. If not, the Management Committee should establish a date – perhaps three months – when formal dissolution will take place. It should also explore what service alternatives are available and can be recommended. The partnership's dissolution should not be allowed to hurt clients or the community.

In all cases, regardless of whether there is or is not conflict …

As the partnership approaches its date for dissolution, the Management Committee should:

- identify the partnership's major accomplishments and acknowledge those people and organizations who have contributed to these accomplishments;
- determine how to inform people - both inside and outside the partnership – of the decision to dissolve;
- document the partnership's history and the lessons which can be drawn from its operations;
- recommend an appropriate alternative to the current partnership; and
- select a time, place and event to celebrate what has been accomplished and to move on.

.

The Partnership's Final Report

Questions to be answered	*To be completed by the partners:*
When was the partnership initiated? What were its goals and objectives?	• • •
What were the partnership's major accomplishments?	• • •
Who contributed to these accomplishments?	• • •
What lessons can we learn from the partnership's successes?	• • •
What lessons can we learn from the partnership's shortcomings?	• • •

Dissolution Checklist

Activity	Responsibility	Completed	Completion Date
Dissolution letter sent to funder		☐	
Document how any assets are being disposed of.		☐	
Prepare final report on partnership		☐	
Final report and financial statement reviewed by management committee		☐	
Final report and financial statement provided to funder and Boards		☐	
Final report shared with staff and others as appropriate		☐	
Files organized so the partnership's history is not lost		☐	
Inform all stakeholders, including clients if appropriate		☐	
Refer clients to other services if need be		☐	
Host a "Moving on" celebration for partnership staff, managers and funders		☐	

18. Evaluation

Partnerships are about people and organizations working together toward common goals. Evaluation is a tool for determining, first, **how well** they are working together and, second, the impact and effectiveness of **what** they are doing.

Purpose

This tool's purpose is to outline the process for evaluating the partnership. It focuses on "how" the partners are doing rather than on "what" they are doing. The tool will help partners evaluate their own activities. In some cases however – for example when there are controversial issues to resolve – the partners may want to involve an independent and objective evaluator for this purpose.

Evaluation is a process for reviewing and assessing an organization, program, activity or relationship. Evaluation helps organizations to understand what has happened and to identify changes that may be needed. It also provides partners with:

- an opportunity to speak openly about their relationship;
- the analysis that is required to think about the future;
- ideas for strengthening the partnership; and
- recommendations for change.

Basic Evaluation Questions

Every evaluation should address these fundamental questions:

Rationale – why did we decide to work as partners in the first place? Is the reasoning still valid?

Impact – what has happened as a result of our working together, as partners? What has the partnership's impact been on our programs, our organizations and our clients?

Goals – did we achieve our partnership goals? Did we achieve what we expected to achieve?

Value – was the outcome worth the expenditure of effort and other resources?

Alternatives – are there better ways of working together? If we made mistakes, how can we avoid them next time?

Next steps – how will we use the evaluation findings?

Steps in Planning the Evaluation

Step 1: Identify why you want to evaluate the partnership.

Potential Reasons for Evaluation

- ☐ to document our activities
- ☐ conflict in the management committee
- ☐ as a foundation for further funding
- ☐ conflict among staff
- ☐ to identify challenges
- ☐ to improve the program
- ☐ funder requirement
- ☐ client concerns
- ☐ potential for other partnerships
- ☐ to learn from the experience
- ☐
- ☐

What will you do with the evaluation findings, conclusions and recommendations:

- ☐ share it with partners, funders and staff
- ☐ use it to adjust the partnership
- ☐ use it to plan further partnerships
- ☐
- ☐
- ☐

Step 2: Determine what questions you want the evaluation to answer. These questions will generally be more specific and precise than those on the preceding page. The following are examples of questions that could be asked.

- ☐ Does each partner understand their roles and responsibilities?
- ☐ Is there a fair division of responsibilities and resources?
- ☐ Is the management committee working well, providing clear direction and making decisions in a timely manner?
- ☐ Does the project manager understand what his/her role is?
- ☐ Do staff know what they are supposed to do and how they are supposed to do it? Are staff and managers from the partnering organizations working well together? Is training provided? Are there efforts underway to build a team?
- ☐ How do the partners communicate with one another? On what issues have the partners disagreed with each other? Is there a mechanism or process in place for resolving differences?
- ☐ What has the partnership's impact been on each organization's own operations and organizational culture? What costs and benefits have resulted from the partnership?
- ☐ What is the partnership's impact on clients and staff?
- ☐ What are the partnership's major successes? What are its major failings?
- ☐ What are the partnership's strengths and weaknesses?
- ☐ Is the partnership helping the organization achieve its program objectives? Or is it hindering its effort to achieve these objectives?
- ☐ Does it make sense to work together as partners? Would the partnering agencies, the funder and the clients be better off with or without the partnership?
- ☐ Are there different or better ways – more cost effective ways perhaps – to achieve the same goals and objectives?
- ☐ What measures would strengthen the partnership?

Step 3: Develop a detailed evaluation plan.

An evaluation plan describes how the work will be done and when each stage will be started and completed. The plan identifies:

- what reports, documents and files will be examined;
- whose views will be gathered, for example managers, staff and clients;
- how will those views be gathered, for example through focus group meetings, personal interviews, written questionnaires or some combination of all three;
- how the information will be assessed and reported upon;
- what opportunities the Management Committee will have to comment on the findings, conclusions and recommendations before they are finalised; and
- when each of the evaluation activities will be completed and when the final report will be presented?

Step 4, Carry out the evaluation activities

The evaluation activities could include the following stages:

a) Meet with the project manager and Management Committee to review the evaluation framework and workplan. Finalise these documents.

b) Review the program description and other file materials, including minutes of Management Committee and staff meetings, program statistics and other information, the Partnership Agreement and the funding contract.

c) Develop an interview guide and distribute it to those who are identified as key informants, for example funders, managers, staff and – if appropriate – a sample of clients. Make appointments to interview the key informants, either in groups or individually as appropriate.

d) Analyse the documents and interview notes. Obtain clarification where required. Prepare a table presenting the project's findings by research question.

e) Prepare a draft final report and review with the project manager and Management Committee. Identify preliminary conclusions and the range of potential recommendations.

f) Consider the input from the Management Committee and project manager, and incorporate this into the report as appropriate.

g) Develop the conclusions and recommendations, finalise the evaluation report and submit print and electronic copies to the project manager.

Step 5: Using the Evaluation

At this time, the Management Committee should **re**consider what it planned to do with the evaluation report. It could:

- ☐ share it with partners, funders and staff
- ☐ use it to adjust the partnership
- ☐ use it to plan further partnerships
- ☐
- ☐
- ☐

Appendix A, Glossary of Terms

Accountability: the obligation to account for your responsibilities. Accountability is based on the assumption that people want improved and more effective services. It reflects their right to know what a government or agency intend to achieve and whether they have achieved their intentions.

Agreement: a mutual understanding among two or more individuals or groups.

Assessment: to review a particular situation to determine its benefit or value so that decisions can be made on how to proceed.

Brainstorming: a discussion technique that encourages people to generate the maximum number and variety of ideas without making any judgments as to their value, merit or appropriateness.

Capacity building: increasing the ability and skills of individuals, groups and organizations to plan, undertake and manage initiatives. The approach also enhances the capacity of the individuals, groups and organizations to deal with future issues or problems.

Coalition: a temporary union for a special purpose of common cause.

Community Development: Community development is collaborative, collective action taken by local people to enhance the long-term social, economic and environmental conditions of their community. The primary goal of community development is to create a better overall quality of life for everyone in the community.

Cost-Effectiveness: That generally answers the question "does the program offer good value for the amount of money spent?" This takes into account financial management and accountability, reporting, program delivery costs as well as program savings. Its begs the question of whether there are alternate methods of delivering the program which are more cost effective.

Culture: The sum of the language, customs and beliefs that are considered characteristic of a particular group of people. Culture describes a shared manner of appearance, behaviours, thinking and feeling.

Culturally appropriate: a term used to describe activities and programs that take into account the practices and beliefs of a particular social or cultural group, so that the programs and activities are acceptable, accessible, persuasive and meaningful.

Evaluation: a formal review process to determine whether goals or objectives have been met, or whether the activity or program is working as intended.

Liability: Legal responsibility for a particular act or event and all the consequences that flow from it. If a person is liable, he or she must usually pay financial compensation to anyone who is injured or suffers a loss because of the act or event.

Merger: the legal consolidation of two or more organizations into one entity.

Partnership: a relationship where two or more parties, having common and compatible goals, agree to work together for a particular purpose and/or for some period of time.

Non-Profit Organization: an organization is nonprofit if it is organized for an educational, charitable, cultural, religious social or athletic purpose. A nonprofit organization can be in business and make money, but any profits must be used for the organization's objectives and not for distribution to members.

Organizational culture is best defined as the beliefs, values, norms and philosophies that guide how an organization operates, both internally and in relation to other organizations. One organization's culture, for example, may encourage staff to take risks while another encourages caution. One may operate much more informally than another. Organizations with very different cultures can have difficulties working together unless the differences are identified and acknowledged, and unless measures are introduced to make them compatible.

Policies provide broad, clear guidelines that set the overall direction for the organization or for how it will carry out a particular activity. (See also "procedures.")

Procedures are the nuts and bolts that describe how the daily work is done in a way that reflects the organization's vision and policies. (See also "policies.")

Resources: people, money and things that may be required to carry out a particular initiative.

Stakeholder: a person or organization with an interest in a particular program, organization or initiative.

Strategic Planning is the process of determining what an organization intends to be in the future and deciding how it will get there. It means developing a vision of the best possible future for your organization and selecting the best path for reaching that destination.

Appendix B, Partnership Resources

BC Healthy Communities Network. 1997. The Sustainability Initiative Guide. Survival Strategies 2000. Vancouver.

Canada, Health Canada. 1997. The Publicity Handbook.

Community Agency Partnership Project. 1999. Getting It Together. Collaboration Models for Community Groups. Prepared by Kylie Hutchinson.

Human Resources Development Canada Aboriginal Relations Office. 1999. The Community Strategic Planning Toolkit for Employment and Training. Prepared by Consilium. Ottawa. April.

Law Foundation of British Columbia, the People's Law School and Volunteer Vancouver. A Guide for Volunteers, Organizations and Boards. 2000. Volunteers and the Law.

Ministry of Community Development, Cooperatives and Volunteers. 2000. "Inventory of Community Economic and Social Development Funding Programs Serving BC. June.

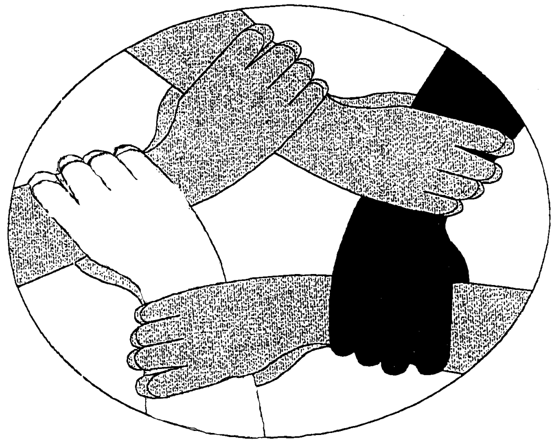
Vancouver Regional Child and Youth Committee. 1995. Making Partnerships Work: A Review of the Management Models of 14 Interministerial Programs in Vancouver. April.

Vancouver Regional Child and Youth Committee. 1995. A Handbook to Guide the Development and Implementation of Partnership Programs for Children and Youth. May.

Vancouver Regional Child and Youth Committee. 1996. A Checklist to Guide the Planning, Development, Implementation and Review of Partnership Programs for Children and Youth. September.

Appendix C, The Collaboration Roundtable

The Collaboration Roundtable



The Collaboration Roundtable is an informal group of government and non-governmental agencies in the Lower Mainland region of British Columbia. It first came together in 1998 with two goals, i.e. to improve partnership relationships and to develop a culture of collaboration among community-based service agencies. To date, its efforts have included three phases:

- **Phase 1 (June 1999)** was designed to enhance agency understanding and awareness of partnership issues. It included the preparation of a discussion paper on partnerships as well as a survey of community agencies. The phase concluded with a workshop examining a variety of partnership issues.

- **Phase 2 (October 1999)** focused on the unique situation of smaller, volunteer-based ethnocultural organizations working in partnership with larger, multicultural or mainstream not-for-profit agencies. Its goal was to identify the barriers that often confound the relationship between these two types of organizations.

- **Phase 3 (April 2000)** was designed to strengthen the ability of agencies to work together. It included, first, an analysis of the partnership tools currently available to organizations and, second, two workshops that brought together over thirty agencies to:
    - examine the relationship between smaller ethnocultural organizations and larger multicultural organizations;
    - address specific partnership concerns; and
    - identify the practical tools needed by organizations wanting to work collaboratively.

Reports from these three phases are available from MOSAIC (1522 Commercial Drive, Vancouver, BC, V5L 3Y2) and Nisha Family and Children's Services Society (201 – 2830 Grandview Highway, Vancouver, BC V5M 2C9). The reports are also available on their web sites: www.nisha.org and www.mosaic.bc.com.

These organizations are regular contributors to the Collaboration Roundtable:

- Cambodian Community Family Services
- Canadian Heritage
- City of Vancouver
- Immigrant Services Society of BC
- Latin American Community Council
- Ministry of Community Development, Cooperatives and Volunteers
- Ministry of Multiculturalism and Immigration, Community Liaison Division
- Metis Family Services
- MOSAIC
- Nisha Family and Children's Services Society
- PIRS
- Self Help Resources of BC
- Somali-Canadian Community
- Surrey Delta Immigrant Services Society
- Surrey Parks and Recreation
- United Way of the Lower Mainland

Collaboration Roundtable Co-Chairs

Eyob Naizghi
Executive Director
MOSAIC
1522 Commercial Drive
Vancouver, BC V5L 3Y2
(604) 254-0244
enaizghi@mosaicbc.com

John Coward, MA
Manager of Partnerships and Employment Programs
Nisha Family and Children's Services Society
#3 – 10318 E. Whalley Ring Road
Surrey, BC V3T 4H4
(604) 951-4821
jcoward@nisha.org

Partnership Toolkit Workshops
Participating Organizations
Spring 2001

Organization & Address	Phone	Fax	E-mail
CCRA Bag 7500 280 Victoria St. Prince George, BC V2L 3K1	(250) 561-7877	(250) 561-5122	
PG United Way	(250) 561-1040	(250) 562-8102	
I.M.S.S. 1633 Victoria Street Prince George, BC	(250) 562-2900	(250) 561-5862	
M.S.D.E..S. #102 – 1577 7th Avenue Prince George, BC V2L 3D5	(250) 565-6020	(250) 565-6698	
(Arlette Santos) #605 – 299 Victoria Street Prince George, BC V2L 5B8	(250) 565-6220	(250) 565-6366	
(Hep C) #39-13th Avenue South Cranbrook, BC V1C 2V4	(250) 426-5277	(250) 426-2134	hepc@cyberlink.bc.ca
Aboriginal Employment Centre Kwantlen University College (Newton Campus) 13479 77 Ave Surrey BC V3W 6Y1	(604) 599-2980	(604) 599-3106	
Arabic Women's Association Abdel Ginena Egyptian Canadian Society – School 2885 Norbury Pl. Coquitlam BC V3C 5T5	(604) 552-9484	(604) 552-9484	

Organization & Address	Phone	Fax	E-mail
Arabic Women's Association 2885 Norbury Pl. Coquitlam, BC V3C 5T5	(604) 552-9484 (604) 552-3677	(604) 552-9484 (604) 945-9169	
Bahai Community #141 – 2401 Ord Road Kamloops, BC V2B 7V8	(250) 376-9733		
BC Parents in Crisis Society #201 1155 West Pender Street Vancouver, BC V6E 2P4	(604) 669-1616	(604) 669-1636	bcpic@radiant.net
Bridges for Women Society of Victoria Box 5732 Stn B Victoria BC V8R 6S8	(250) 385-7410	(250) 385-7459	
Cambodian Community Family Support Program C/o Bridge Health Clinic 3080 Prince Edward St Vancouver BC V5N 4C8	(604) 877-8352	(604) 877-8105	cambfamp@vcn.bc.ca
Campbell River Multicultural & Immigrant Services #43 1480 Dogwood St Campbell River, BC V9W 3A6	(250) 830-0171	(250) 830-1010	
Canadian Heritage 711 Broughton St. Victoria, BC V8W 1EZ	(250) 363-3514	(250) 363-8552	
Canadian Heritage # 400, 300 W Georgia St Vancouver BC V6B 6C6	(604) 666-2218	(604) 666-3508	
Canadian Hispanic Congress 1190 Fodgewood Rd North Vancouver, BC V7R – 1Y9	(604) 980-0621	(604) 980-0621	

Organization & Address	Phone	Fax	E-mail
Childcare Society for the East Kootney #201-125 10th Avenue South Cranbrook, BC V1C 4H8	(250) 489-5300	(250) 489-3151	CFC@cintek.com
City of Vancouver 453 W 12th Ave Vancouver BC V5Y 1V4	(604) 871-6637	(604) 871-6048	
CMHA	(250) 426-7477	(250) 426-2134	
CMHA – EIC 39-13 Aves Cranbrook, BC V1C 2V4	(250) 426-5222	(250) 426-2134	
CMHAEK 39-13th Avenue South Cranbrook, BC V1C 2V4	(250) 426-7477	(250) 426-2134	cmha-ek@cmha-ek.org
CMHAEK – Kootenay Haven Transition House 39-13th Ave.South Cranbrook, BC V1C 2V4	(250) 426-5222	(250) 426-2134	
College of the Rockies Box 8500 Crankbrook, BC V1C 5L7	(250) 489-2751 local 351	(250) 489-1790 local 351	
Community Education , C.N.C. 3330 22nd Avenue Prince George, BC V2N 1P8	(250) 562-2131	(250) 561-5862	
Congolese Community	(604) 873-9815	(604) 873-9815	
Cowichan Valley Intercultural & Immigrant Aid Society #3 83 Brae Rd Duncan, BC V9L 2N7	(250) 748-3112	(250) 748-1335	cuiias@cow-net.com
Cranbrook Boys and Girls Club 1404 2nd Street North Cranbrook BC V1C 3L2	(250) 426-3830	(250) 426-3036	joblinks@cyberlink.bc.ca

Organization & Address	Phone	Fax	E-mail
Cwenengitel 14121 115A Avenue Surrey, BC V3R 2R6	(604) 588-5561	(604) 588-5591	cwenengitel@intouch.bc.ca
Egyption Canadian Cultural Soc of BC	(604) 945-9848	(604) 945-9848	
ESL Department Camosun College 3100 Foul Bay Rd Victoria, BC V8P 5J2	(250) 370-4945	(250) 370-4938	
Family Services of Greater Vancouver 202 – 1193 Kingsway Vancouver, BC V5V 4C9	(604) 874-2938 local 203	(604) 875-9898	
Federation of African Communication of BC 1104 – 120 Agnes Street New Westminister, BC V3L 5C8	(604) 526-8105	(604) 437-7545	
Global Village Store & ICA 535 Pander Ave Victoria, BC	(250) 385-5179		
HRCC Surrey 7404 King George Hwy Surrey, BC V3W 0L4	(604) 590-3346 local 352	(604) 590-5351	
HRDC Regional Headquarters Library Square Tower 15th Floor – 300 W. Georgia St Vancouver, BC V6B 6G3	(604) 666-2267	(604) 666-1042	
Human Resources Officer Ministry of Transportation and Highways #213 – 1011 – 4th Avenue Prince George, BC V2L 3H9	(250) 565-6364	(250) 565-6165	

Organization & Address	Phone	Fax	E-mail
Human Service Work College of the Rockies Box 8500 Cranbrook, BC V1C 5L7	(250) 489-2751 local 372	(250) 489-1790	
I.M.S.S. 1633 Victoria Street Prince George, BC V2L 3P5	(250) 562-2900	(250) 563-4852	imss_settlement@mag-net.com
Immigrant & Visible minority Women of BC (IVMW of BC) C/O 930 Balmoral Rd Victoria, BC V8T 1A8	(250) 388-4728	(250) 386-4395	
Immigrant Program Comox Valley Family Services 1415 Cliffe Ave Courtenay, BC V9N 2K6	(250) 338-7575	(250) 338-2343	
Immigrant Refugee Settlement 930 Balmoral Rd Victoria, BC V8T 1A8	(250) 388-4728	(250) 388-4395	
Immigrant Services Society 501-333 Terminal Ave Vancouver BC V6A 2L7	(604) 684-2561	(604) 684-2266	
Immigrant Society Kamloops 201 – 554 Seymour St. Kamloops, BC V2C 2G9			
Indo-Canadian Cultural Association 12459 70 Avenue Surrey, BC V3W 0P8	(604) 599-6489	(604) 599-6814	
Japanese Community Volunteers Assoc 511 East Broadway Vancouver, BC V5T 1X4	(604) 687-2172	(604) 687-2168	jcva@portal.ca

Organization & Address	Phone	Fax	E-mail
Kamloops & Area N.A.J.C. 1724 Clifford Ave Kamloops BC V2R 4G6	(250) 376-3506	(250) 376-4204	
Kamloops Chinese Cultural Assoc #110 – 206 Seymour Street Kamloops, BC V2C 2E5	(250) 372-0855	(250) 372-1532	ris@mail.kamlooops.net
Kamloops Chinese Cultural Association 952 Linthorpe Road Kamloops, BC V1S 1V6	(250) 554-1082		
Kamloops Immigrant Services 110 – 206 Seymour Street Kamloops, BC V2C 2E5	(250) 372-0855	(250) 372-1532	kis@mail.kamloops.net
Kamloops Immigrant Services 31 –975 Tranquille Road Kamloops, BC V2B 3J5	(250) 376-4493		
Kamloops Immigrant Services 110 – 206 Seymour Street Kamloops, BC V2C 2E5	(250) 372-0855	(250) 372-1532	antiracism_@hotmail.com
Kamloops Laubach – Academy Program 203 – 180 Seymour Street Kamloops, BC V2C 2E3	(250) 314-9610	(250) 314-9854	
Kamloops Laubach –Literacy Program 203 – 180 Seymour St. Kamloops, BC V2C 2E3	(250) 828-2665	(250) 314-9854	KLLC@telus.net
Kamloops MultiCultural Society 262 Lorne Street Kamloops, BC V2C 1W1	(250) 372-5751	(250) 372-5710	

Organization & Address	Phone	Fax	E-mail
Kimberley Community Living Society 421 4th Avenue Kimberely, BC V1A 2R7	(250) 427-3637		
Kootenay Haven Transition House Box 336 Cranbrook, BC V1C 4H8	(250) 426-4887	(250) 426-4808	
Latin American Community Council 736 Kingsway Vancouver BCV5V 3C1	(604) 876-5420 (604) 324-6212	(604) 324-6116	
Laubach Literacy of Canada 203 – 180 Seymour Street Kamloops, BC V2C 2E3	(250) 374 -5240	(250) 314-9854	laubach@telus.net
Legal Aid Services Society 302 – 1488 Fourth Avenue Prince George, BC V2L 4Y2	(250) 564-9717	(250) 564-8636	
Little Mountain Neighbourhood House 2981 Main Street Vancouver, BC V5V 3P3	(604) 879-7104	(604) 879-7113	
M.S.D.E.S. 102 – 1577 7th Avenue Prince George, BC V2L 3P5	(250) 250-6020	(250) 565-6698	
Mental Health Consumer Advocate (CANDO)	(604) 582-9593	(604) 582-9578	
Metis Family Services Unit A 10615 King George Hwy Surrey BC V3T 2X6	(604) 584-6621	(604) 582-4820	
Ministry for Children and Families #228 – 1250 Quadra St Victoria, BC V8W 2K7	(250) 387-5077	(250) 356-6125	

Organization & Address	Phone	Fax	E-mail
Ministry of Community Development, Cooperatives & Volunteers PO Box 9915 Stn Prov Govt Victoria, BC V8W 9R1	(250) 356-6362	(250) 356-6417	
Ministry of Multiculturalism & Immigration 2nd Floor 1125 Howe St. Vancouver BC V6Z 2K8	(604) 775-0331	(604) 775-0670	
Multicultural Program Coordinator 930 Balmoral Victoria, BC V8T 1A8	(250) 388-4728	(250) 386-4395	multic@icavictoria.org
Multicultural Society of Kelowna 1875 Spall Road Kelowna, BC V1Y 4R2	(250) 762-2155	(250) 762-8155	multikel@okanagan.net
Nisha Family & Children's Ser Soc #3 – 10318 E. Whalley Ring Road, Surrey, BC, V3T 4H4	(604) 951-4821	(604) 951-4808	
Nisha Family and Children's Ser Soc #201 – 2830 Grandview Highway Vancouver, BC V5M 2C9	(604) 412-7950	(604) 412-7951	
North Fraser Metis Assoc 16580 16th Avenue Surrey, BC V4V 2B7	(604) 444-9164 (604) 531-7950	(604) 444-9164 (604) 531-7950	n.frasermetis@intouch.bc.ca
North Shore Community Schools Assoc 2364 Rosewood Ave Kamloops, BC V2B 4Z1	(250) 376-2371	(250) 376-1178	
North Shore Community Schools Assoc. 2364 Rosewood Ave Kamloops, BC V2B 4Z1	(250) 851-9946		

Organization & Address	Phone	Fax	E-mail
P.G. Public Library 887 Dominion Street Prince George, BC V2L 5L1	(250) 563-9251	(250) 563-0892	
P.G.N.A.E..T.A 1591 4th Avenue Prince George, BC V2L 3K1	(250) 561-1040		
Pacific Immigrant Resources Society #205 2929 Commercial Drive Vancouver BC V5N 4C8	(604) 298-5888	(604) 298-0747	pirs@amssa.org
Parent South Elem PAC 325 Whitesheild Cres Kamloops, BC V2E 1G3	(250) 374-5160		
P.G. Native Education Centre 1600 3rd Avenue Prince George V2L 3G6	(250) 564-3568	(250) 563-0924	
Phoenix Society			
PICS #200-8969 – Main Street Vancouver, BC V5X 3L2	(604) 324-7733	(604) 324-7744	
PICS #109 – 12414 82nd Avenue Surrey, BC V3W 3E9	(604) 596-7722	(604) 583-8848	
PIRS #205 2929 Commercial Drive Vancouver, BC V5N 4C4	(604) 298-4560	(604) 298-0747	pirs@amssa.org
Quesnel Multicultural Society	(250) 747-4548	(250) 747-4548	
Red Cross 1399 6th Avenue Prince George, BC V2L 3K1	(250) 564-6566	(250) 564-2688	

Organization & Address	Phone	Fax	E-mail
Langley Family Services 5339 – 207th Street Langley, BC V3A 2E6	(604) 534-7921	(604) 534-9884	
Saanich Recreation Community Services 780 Vernon Ave Saanich, BC V8X 2W6	(250) 475-5494 local 3447	(250) 475-5411	
Self-Help Resource Centre #306 1212 West Broadway Vancouver, BC V6H 3V1	(604) 733-6186	(604) 730-1015	shra@vcn.bc.ca
Semiahmoo First Nation 16049 Beach Road Surrey, BC V3S 9R6	(604) 536-3101	(604) 536-6116	
Seniors Facilitator, ICA 930 Balmoral Victoria, BC V8T 1A8	(250) 595 5301		
Somali Canadian Community Development Assoc 216 1956 W. Broadway Vancouver BC V6J 1Z2	(604) 596-9034	(604) 596-9054	
South Sudanese Community Association	(604) 516-0018		
South Surrey White Rock Women's Place 15318 20 Ave Surrey, BC V4A 2A2	(604) 536-9611	(604) 536-6362	womens_place_communitydev@telus.net www.sswrwomensplace.com
SUCCESS 28 West Pender Street Vancouver, BC V6B 1R6	(604) 408-7274 local 3042		

Organization & Address	Phone	Fax	E-mail
SUCCESS A7 The Boardwalk Plaza 10160 152 St. Surrey, BC V3R 9W3	(604) 588-6869	(604) 588-6823	
Surrey Delta Chinese Community Society 12558 61 Ave Surrey BC V3X 3G6	(604) 596-1584	(604) 596-1584	
Surrey Delta Immigrant Services Society #1107 7330 137th Street Surrey, BC V3W 1A3	(604) 597-0205	(604) 597-4299	
Surrey Parks and Recreation 7452 132 St Surrey BC V3W 4M7	(604) 502-6352	(604) 501-5081	
Surrey Social Futures 10667 – 135A Street Surrey, BC V3T 4E3	(604) 585-7666	(604) 583-5548	ssf@paralyn.bc.ca
United Way 4543 Canada Way Burnaby BC V5G 4T4	(604) 294-8989	(604) 293-0220	
United Way of Greater Victoria 1144 Fort St Victoria, BC V8N 3K8	(250) 385-6708	(250) 385-6712	
Urban Community Dev't. Unit Ministry of Community Development, Co-ops and Volunteers Suite 401, 750 West Pender Street Vancouver, BC V6C 2T7	(604) 660-3546	(604) 660-3554	
Victoria Native Friendship Centre 610 Johnson St Victoria, BC V8W 1M4	(250) 384-3211	(250) 384-1586	

Organization & Address	Phone	Fax	E-mail
Victoria READ Society 720 Linden Ave Victoria, BC V8V 4G7	(250) 388-7225	(250) 386-8330	info@readsociety.bc.ca
Vietnamese Friendship Soc in Fraser Val	(604) 572-8930	(604) 572-8930	
Volunteer Bureau (CMHA) 39-13 Aves Cranbrook, BC V1C 2V4	(250) 426-8019	(250) 426-2134	volunteercranbrook@cmhaek.org
Volunteer P.G. Box 544, Stn A Prince George, BC V2L 4S8	(250) 564-0224	(250) 564-0232	vpg@mag-net.com
Volunteer Victoria #211 620 View St Victoria, BC V8W 1J6	(250) 386-2269	(250) 386-2279	
Women's Centre (Anti-Racism Program)] 32-13th Avenue South Cranbrook, BC V1C 2V4	(250) 426-2943	(250) 426-2976	