



Quick Guide:  
**Building Partnerships for**  
**Heart & Soul**  
**Community Planning**

Spring, 2011





## Introduction

### **Effective collaboration puts the heart and soul into an ordinary community project.**

Partnerships between organizations, individuals and regulating agencies means that a project will be able to access a broader array of perspectives and a deeper pool of talent, resources and energy. These partnerships will also help weave in complementary efforts and increase shared ownership for project outcomes and implementation. This Quick Guide is about building and maintaining the partnerships necessary for a successful Heart & Soul Community Planning project.

“Partnership” in this Quick Guide refers to any working relationship between participating organizations or individuals who are supporting the project—partners could be, for example, the leading or supporting organizations, town departments or committees, project managers, advisory committee members, or a team of young people conducting research in the community.

## Partnership Roles and Responsibilities

There are three essential phases to building a partnership: **Recruiting**, **Forming** and **Maintaining**. These phases start off sequentially, but mid-project partnership maintenance can return the partnership to recruiting as new needs are identified, or Re-Forming if the partnership framework needs to be realigned.

### RECRUITING: Identify Partnerships Strategically

1. **Start with a small team** of partners you know and trust.
2. **Broaden your search** by finding additional partners who can fill gaps in representation, talent and resources, access to decision-makers and regulators, and access to funding. To add diversity and fresh voices to the conversation, reach beyond the regular list of agencies or committee junkies.
3. **Bring on partner-specialists** for discrete parts of the project. Not all partners need to be members of the core project team, especially if their mission or skill set is highly specialized.
4. **Partners need a reason to participate.** Before you approach a potential partner, try to anticipate why they might want to become involved and think of concrete ways for them to contribute.

**A Community Network Analysis** ([http://www.orton.org/resources/hs\\_handbook/network\\_analysis](http://www.orton.org/resources/hs_handbook/network_analysis)) can help you identify partners, people and resources necessary for success.

Heart & Soul Community Planning Projects rely on a **Community Advisory Team** ([http://www.orton.org/resources/hs\\_handbook/advisory\\_team](http://www.orton.org/resources/hs_handbook/advisory_team)). It's likely that some partners will be part of this team.





5. **Ensure that partner representatives have organizational support.** A partner representative is less effective if they do not have the support of their organization's leadership, or if the representative doesn't have the authority to make decisions.

## FORMING: Clarify the Partnership Framework

### 6. Define and Confirm the Partnership Structure.

Begin to clarify how the project work will be distributed between partners, how much is expected of each partner, and who will be responsible for specific tasks as they arise. Some partners will advise, others will want to do the legwork or have input on decisions. Partner roles and their obligations can be broadly defined when they fit into a specific partnership category, such as:

- *Project Management or Leadership Teams* include the partners closest to the project and most active in making it happen (typically 3-5 members). Often this team includes those who initiated the project.
- *Community Advisory Teams* are typically the largest group of partners. They represent diverse stakeholder groups, provide strategic direction on project decisions, and help engage community members in project activities. Partners on this team may participate in subcommittees that form around a particular project need such as communications. Partners on this team should also act as ambassadors for the project to other networks, seeking out and recruiting additional partners as necessary for additional support.
- *Task Forces or Action Teams* work on discrete tasks such as research on a specific issue or delivering an activity such as an outreach event. These teams may include partners from the Advisory team as well as specialist partners who are not on the Advisory team.

A list of model partnership agreements can be found in section 12 of **Tools for Building and Sustaining Partnerships**.  
([http://www.pcrs.ca/uploads/7L/\\_A/7L\\_ATXdmJl3bp9lgOtVTKA/partnershiptoolkit.pdf](http://www.pcrs.ca/uploads/7L/_A/7L_ATXdmJl3bp9lgOtVTKA/partnershiptoolkit.pdf))

- ### 7. Define partnership goals and expectations of success.
- Defining shared goals helps partners understand each other's values and incentives for participating. Make the goals as realistic and well defined as possible, and try to include a description of when they will be achieved (link to Project Design chapter). For a management team or project advisory committee, these goals could link directly with project outcomes. For a task force or action team, the goals would typically relate more directly to the objectives of their discrete task. Goals and expectations should be developed early in the partnership.

**Project design and management** is a central feature of partnership frameworks and maintenance. For more information on these topics, see the **Handbook chapter on Project Design** ([http://www.orton.org/resources/hs\\_handbook/project\\_design](http://www.orton.org/resources/hs_handbook/project_design)).

- ### 8. More work requires more details.
- For example, the lead organizations are investing enough time and money in a project to warrant a much more detailed framework than the individuals who are on the project advisory team. Make sure that partners are aware of key project elements like milestones, work plans, event calendar, budget, and so forth. As responsibilities get more complex, consider including the following details:





- 9. Make sure you are on the same page.** Miscommunication can lead to all sorts of partnership stress: false expectations, tasks that fall through the cracks, or duplicated efforts. A head nod at a meeting could mean that everyone is on board, but it always helps to write it down. This could range from a simple who, what, and when in a memo to a more formal partnership agreement.

## MAINTAINING: Beer, Chocolate, Ice Cream & Flowers

- 10. Don't forget about the work plan and budget.** The biggest sources of partnership stress are time and money. Without good oversight, it's easy to spend 80 percent of the time or money on phase 1, and then have to scrape through the rest. Make sure that someone is tracking and regularly reporting on the budget.
- 11. Encourage regular feedback and communication.** Open and regular communication is critical to maintaining relationships and keeping partners engaged. Project leaders should check in regularly with the teams and with individual partners to ensure that issues are addressed and resolved quickly.
- 12. Review procedures and partnership structure.** During the life of the partnership, make sure to include a regular time for revisiting the procedures, goals, definitions of success, and partner roles and responsibilities. Ask partners what is working for them, and what is not, and identify areas that can be adapted for a better fit. Schedule such reviews in advance on a monthly, bi-monthly or quarterly basis depending on the partner and the duration of the partnership. Intensions to check in leads to...well, you know where.
- 13. Celebrate achievements, recognize contributions and deal with setbacks.** Make sure that everyone gets a pat on the back, both personally and publicly, for their hard work—especially those who work behind the scenes and may feel overlooked. Put 'bouquet of flowers' in your budget and hand them out at a big (or little) event. Don't ignore setbacks either. If the project is losing momentum due to lack of progress or major obstacles, or partners are losing interest due to unfulfilled expectations, address these issues and talk about how they can be redressed. If they are not openly discussed, they will only grow bigger.





## Project Needs Assessment/Partner Responsibilities Outline

The table below lists key skills and resources that a project team should have. You can use this table to:

1. **Identify the gaps:** Rank each partner from 'High' to 'Low' using the following qualifications. Is there an area where your team could use some help? Who could you partner with to fill the gaps?
2. **Outline partner responsibilities:** Write in the role each partner will play for each area of project expertise. This could simply be 'lead' or 'support', or it could be more descriptive (e.g. Partner Y will reach out to stakeholders A and B).

Key Roles/Skills	Partner X	Partner Y	Partner Z	Other Potential Partners to approach
Knowledge of Issues				
Management/Coordination				
Budgeting				
Communications				
Fundraising				
Access to Regulators and Policy Makers				
Access to Key Stakeholders				
Access to community members				
Access to Youth				
Access to 'Hard to Reach' Groups				



## Resources

### **The Community Tool Box. Creating and Maintaining Coalitions and Partnerships**

**Website:** [http://ctb.ku.edu/en/dothework/tools\\_tk\\_1.aspx](http://ctb.ku.edu/en/dothework/tools_tk_1.aspx)

This website provides several outlines, toolkits, examples and additional links for developing coalitions and partnerships.

### **The Partnership Toolkit: Tools for Building and Sustaining Partnerships (2001)**

**Website:** [http://www.pcrs.ca/uploads/7L/\\_A/7L\\_ATXdmJl3bp9lgOtVTKA/partnershiptoolkit.pdf](http://www.pcrs.ca/uploads/7L/_A/7L_ATXdmJl3bp9lgOtVTKA/partnershiptoolkit.pdf)

This 134-page document is an extensive how-to manual on creating and sustaining partnerships of all kinds. It includes a number of checklists, guidelines and other tools for partnership development including partner identification and evaluation, model partnership agreements, and conflict resolution.

### **Building Successful Collaborations: A guide to collaboration among non-profit agencies and between non-profit agencies and businesses (2006)**

**Website:** [http://www.cfc-fcc.ca/link\\_docs/collaborationReport%2Epdf](http://www.cfc-fcc.ca/link_docs/collaborationReport%2Epdf)

This 20-page document reviews basic best practices for creating and maintaining partnerships, including '20 success factors' for partnerships, and a troubleshooting guide.

