



# Working in Partnership

## Recipes for success

## Working Alone

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# Forward

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The Wild Rose Foundation has a mandate to create and foster opportunities for the growth and development of Alberta's volunteer and non-profit sector. As a partner in this very important sector, we are aware that new realities are confronting non-profit organizations, brought about by an increasingly complex world and a dramatic shift in traditional roles. Volunteer agencies have discovered that, now, more than ever, their talents and abilities are respected and in demand. Partnering—sharing resources to reach a common goal—has become a significant way of working in this changing world.

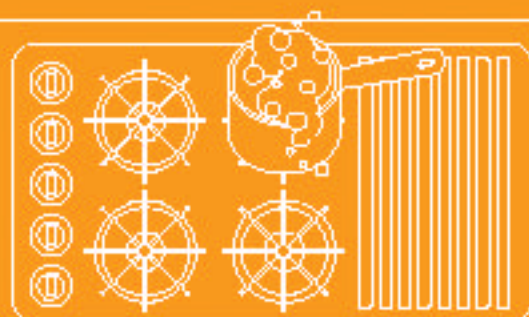
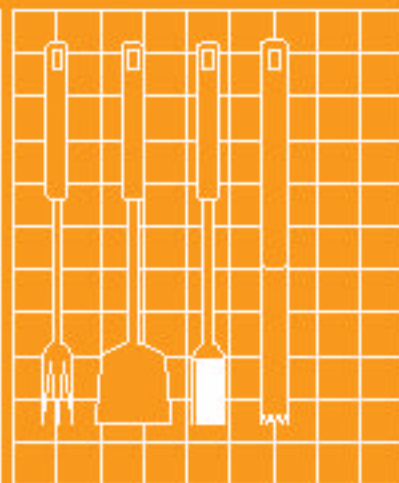
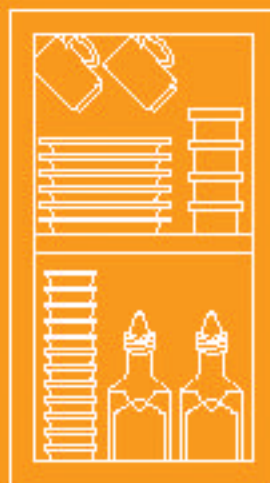
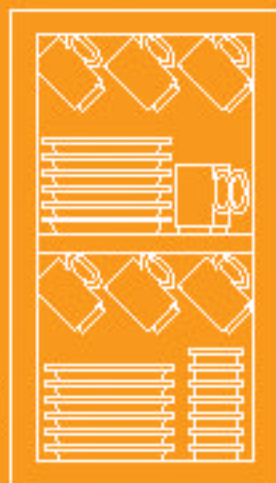
The most important principle of good, solid community development is asking the community what they want. We listened and the result is here in this kit—an excellent, practical guide to support the important work you do in your daily business (or the voluntary sector). We encourage Alberta's volunteer agencies to utilize this resource and to let us know what you think. We intend for the kit to grow, based on your feedback.

I am convinced that the future of our communities and Alberta as a province, depends on active community participation from a strong volunteer sector. I believe that volunteers are, in many cases, the heart and soul of the community. They provide a strong foundation on which many things have been built. The Wild Rose Foundation urges all volunteer organizations to take the messages of this kit seriously. By working together we will keep ourselves and our communities strong!

Sincerely,



N. J. (Noni) Heine  
Executive Director  
Wild Rose Foundation



# 1.0 What and Why?

Cooking as a team can be very rewarding. Not only can you divide up the work by working together, but you will also feast like you've never feasted before.

An overview

# What and why? An overview

## Why the trend towards collaboration?

The forces that are driving increased collaboration amongst non-profit, volunteer organizations come from many sources. The major source is the decrease in the prominence of government in community life.

The age of ever-bigger government has ended and there has been a shift of social functions to the non-profit and private sector. The shift has made the building of coalitions and partnerships between groups with similar mandates and missions essential.

The political shift has been accompanied by an equally dramatic economic shift. Non-profit organizations are scrambling for scarce dollars. Private sector sponsors have moved from being merely donors to looking for partnership opportunities with community groups that they support. Partnerships which pool resources are often the only way to achieve the critical mass to move forward.

All of this is taking place in an increasingly complex society. Agencies increasingly need to define their mission by broadly-based objectives, rather than by activities—which means looking for others who share those same objectives.

## The Alberta experience

Partnering is not a new experience for Albertans. The farm family that provided room and board for the school teacher was an important "partner" in bringing education to rural communities. The reputation that Albertans and Alberta organizations have for finding innovative ways of working together to address social opportunities and issues is unparalleled in Canada.

Virtually every volunteer organization in Alberta has experience with partnering, although those experiences are spread across a broad spectrum. At one end, there is the simple sharing of resources to produce an event or activity. Often that grows to a broader-based partnership involving more complex objectives or goals and many different kinds of resources. At the most sophisticated level, there are collaborations that not only jointly develop the mission and strategies of the partnership, but also influence the vision and mission of their partners. This kit is intended to be useful in all those areas.

## Goal

*Understand the breadth and depth of possible types of relationships.*

## Foundation

*Increasingly, the volunteer sector is acting in collaboration. Organizations which don't work with others will be left behind.*



## Three types of partnerships

Before proceeding, it is wise to consider three broad types of partnerships—which have different characteristics—that will influence how organizations can move forward. The kit supplies a framework for all three types of partnerships.

1. Partnerships with other non-profit groups—Usually based on an overlap of mission and a strong commitment to a joint goal, this type of partnership generally involves an attempt to maximize the resources of both organizations. One plus one often adds up to five or six, rather than two, when non-profits partner with each other.

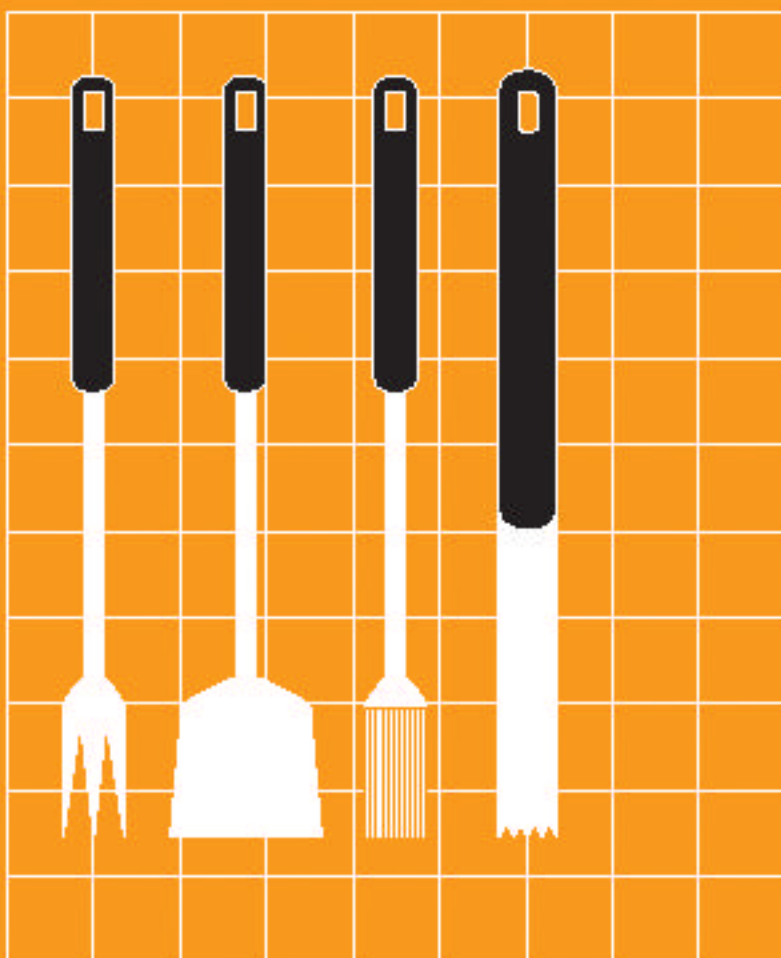
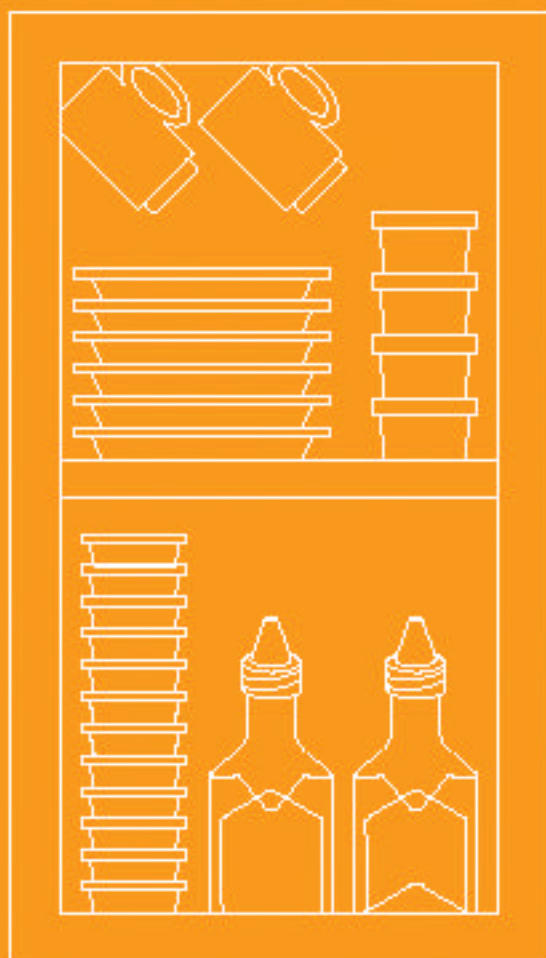
2. Partnerships with the private sector—Alberta businesses have always supported community agencies. The exchange of a cheque and a thank you letter is not a partnership—but it may be the start of a relationship that can become one. Building equality in a partnership is important to create effectiveness. One of the goals of this kit is to help agencies identify the expertise and resources they can bring to their private sector partners.

3. Partnerships with government agencies or programs—In the new world, government agencies or programs (at the municipal, regional, provincial and federal level) are increasingly looking to the agencies they fund and work with as partners rather than clients. While the accountability required of government means that partnering with a government agency or program involves some bureaucracy and formality, non-profits are discovering that a partnering attitude has additional rewards. It not only maximizes the opportunity of the existing program, it often means they are "at the table" when programs are changed or future programs developed.

## Summing up—what's a "partnership"?

There are many definitions. For the purposes of this kit, it is defined very simply. A partnership exists when two or more organizations "share resources to reach a common goal." Partnerships can be small, medium or large—temporary or intended to be permanent.

Partnerships are relationships between two or more organizations. No matter their characteristics, all relationships between organizations have process requirements if they are going to thrive. This kit identifies the process requirements.



## 2.0 How to use the kit

The tools are in place. How you use them to create your masterpiece and achieve fabulous results is up to you.

Tools for success

*The vast majority of non-profit agencies say they are already in the partnering world and they want to move forward—they just don't know how to do it. This kit provides a step-by-step approach for doing just that. If you are starting out, read and use the entire kit, in sequence. If you have a specific issue, use the appropriate section.*

You are in a partnership and being pulled in directions which you don't want to take...**3.0 Know yourself**

You know you need to work with others, but don't know how to get started...**4.0 Know what you want—Identifying potential partners**

You have some ideas where to go for partners, but the array of potential choices is bewildering...**5.0 Establish compatibility—Setting the partnership framework**

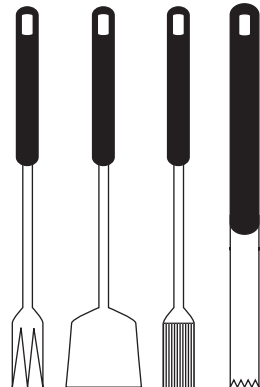
You have narrowed the partnership choices down to a few or maybe one, and it is time to get serious about going forward...**6.0 Get the details right—Writing the partnership agreement**

You have taken the leap and are working in partnership. How do you make it run smoothly? **7.0 Being a good partner—Making the partnership work**

You have been working in a partnership for awhile, and it is going smoothly. Maybe a little too smoothly. How do you keep an eye on things? Help them grow? **8.0 Make it better—Evaluating and enhancing the partnership**

You have hit a snag. Something has gone wrong. Or the initiative seems to have gone out of it. How to respond? **9.0 When things go astray—Handling conflict**

The partnership you either have or are contemplating is complex. You need to learn more or find resource support...**10.0 Appendix**



## Goal

*Recognize the flow of the relationship cycle.*

## Foundation

*If you are starting out, use the kit as a book, beginning to end.*

*If you have a specific issue, use the chapters of the kit as reference tools.*





## 3.0 Know yourself

Are you prepared to invite another cook to the kitchen? If so, what strengths do you bring to the table? Are there specific areas where a partner could complement your abilities? Are you prepared to work off the same page?

Analyzing your situation

## Know yourself

Take the time to articulate the nature of your organizational self.

A partnering relationship is created from two or more. Be clear on who you are and what you bring to the partnership.

## What to do

A line drawing of a double-breasted jacket hanging on a wire hanger. The jacket features a high stand-up collar, two rows of buttons (one on each side), and a central seam. The hanger is a simple wire design with a circular base and a hook.

## 3.2.0 Know yourself questions to ask

### 3.2.1 Renewing our vision

1. What is our organization's reason for being—our vision, mission, mandate, objectives, goals?
2. What have we accomplished since we last reviewed our reason for being? Has it changed?
3. When we look three to five years in the future, what do we want to have accomplished? Be visionary. What does our success look, feel, sound, taste like?

### 3.2.2 Our current reality

1. What are we good at, our key strengths?
2. What are the challenges and weaknesses we face?
3. What do we need to do now to get to where we want to go?

### 3.2.3 Our priorities

1. What are the three or four key initiatives that we will undertake now to move forward?
2. Who will lead those initiatives?
3. What is our plan?
4. What is the timetable?

## 3.2.0 Know yourself questions to ask

### 3.2.4 Are we ready to partner?

1. How could partnerships help us move forward toward our vision?
  - What are our expectations?
  - Could a partnership help with our key initiatives?
  - What value do we have to offer to our partners?
2. Do members of our organization agree that partnership is desirable? If some members are concerned should we:
  - Seek friends or other community agencies to talk about their partnership experiences?
  - Look for an opportunity to start small (e.g. with an event or program) as a learning experience to address those concerns?
3. Will the partnership have any effect (positive or negative) on our normal business?
  - Will it effect our other key priorities?
4. Partnerships take time—and time is a vital resource in every volunteer organization. How much time are we willing to devote to this commitment?
  - Does that imply a limit on the scope of our partnership initiative?
  - Can we create a cost/benefit analysis to make sure our time is well invested?
5. Partnerships are also built on relationships and require champions. Who inside the organization will champion our partnership initiative?
  - What will be the involvement required of board, staff and volunteers?
  - Is everyone whose time will be required willing to make that commitment?
6. If our organization is already involved in partnerships, will this initiative have any impact (positive or negative) on those partnerships? What will we do to ensure the interests of our current partners?

## 3.2.0 Know yourself questions to ask

### 3.2.5 Limits to partnerships

1. Are there legal situations that may place limits on any partnership (e.g. contracts to provide services, formal agreements with other partners, Freedom of Information and Privacy restrictions)?
  - Would a partnership raise liability issues?
  - Do we need to seek legal advice before proceeding?
2. Is there a risk that a "mutual mission" with a partner will erode our core mission? How will we communicate this concern to potential partners?
3. Are there types of partners that we will not consider because they would compromise our goals (e.g. liquor or tobacco companies for youth groups)?
4. Do we have standards of ethical behavior that we will expect from partners?
5. Do we need to place limits on information we have that partners may want to share (e.g. access to member/client lists or use of our name or logo)?
6. If there is a wide range of conditions to potential partnerships, do we need to prepare policies and guidelines before going ahead?



## 4.0 Know what you want

When it comes to fusion cuisine, some things work well together and others don't. The right combination can be absolutely magical.

Identifying potential partners



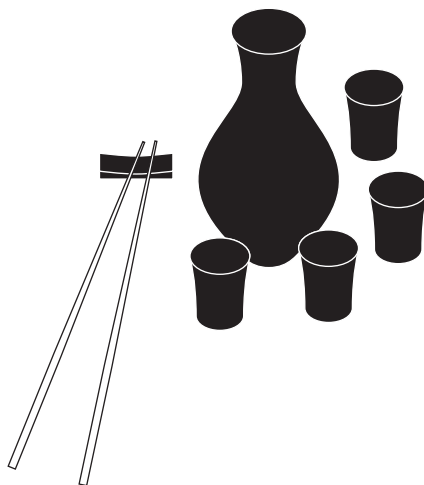
## Know what you want—identifying potential partners

*Once an organization decides that partnering may serve its overall mission, it is important to do more work concerning its expectations and what it can offer potential partners. Volunteer agencies often under-value what they can contribute to potential partners. They have a community presence that is often of value to others. They understand—and have access to—clients and audiences. They often have particular skills or expertise that a partner needs. Don't undersell yourself when determining what resources or benefits you can bring to a potential partnership. Unfortunately, there is no partner master list as every partnership is unique. It takes a disciplined internal process to identify the right partner for you.*

## 4.1

### What to do

	Done
1. Be as specific as possible about what you hope to gain from a partnership.	
2. Identify what you have to offer potential partners.	
3. Build a model of what an ideal partner would look like.	
4. Identify potential partners—based on current relationships, ones you can build or from a scan of your community.	
5. Get your story ready.	



### Goal

*Take the time to articulate your organizational needs and the value you could bring to a partnering relationship.*

### Foundation

*A partnering relationship exists for reasons. Be clear on your reasons. Understand your value.*

## 4.2.0 Know what you want questions to ask

### 4.2.1 What do we want?

1. What resources does our organization hope to access by entering a partnership? This list is a guide, but only a guide—be innovative in setting your targets:
  - cash resources for operational funding
  - cash resources for program funding
  - enhanced access to granting or other funding programs
  - gifts-in-kind (products, services or supplies)
  - increased credibility or reputation in the community
  - expertise (e.g. marketing, accounting)
  - added voices or support for your mission
  - advice and counsel
  - facilities for ongoing or occasional use
  - access to employee volunteer or donation programs
  - secondments
  - introductions to a specific audience or to a broader community

### 4.2.2 What can we offer?

1. What do we have to offer our partner? (Again, these examples are meant only as a starting point)
  - An overlap of vision/mission that allows both partners to move more quickly to their goals
  - Detailed knowledge of the issue that our mission serves
  - Knowledge of, and access to, the client base we serve
  - Overall community positioning
  - Skills and expertise that partners value
  - Opportunities to showcase and promote our partners

## 4.2.0 Know what you want questions to ask

### 4.2.3 What would an ideal partner look like?

1. Given both our needs and strengths, what would our ideal partner or partners look like?
  - Sector (another volunteer agency, private sector partner, government agency or program)
  - Mission or mandate
  - Size
  - Experience or expertise
  - Culture—it is a broad term but "culture" refers to "the way we do things" including examples such as:
    - Nature and style of decision-making
    - Openness of communication
    - Respect for our audiences/clients
  - Geographic location (e.g. community-based, provincial, national)

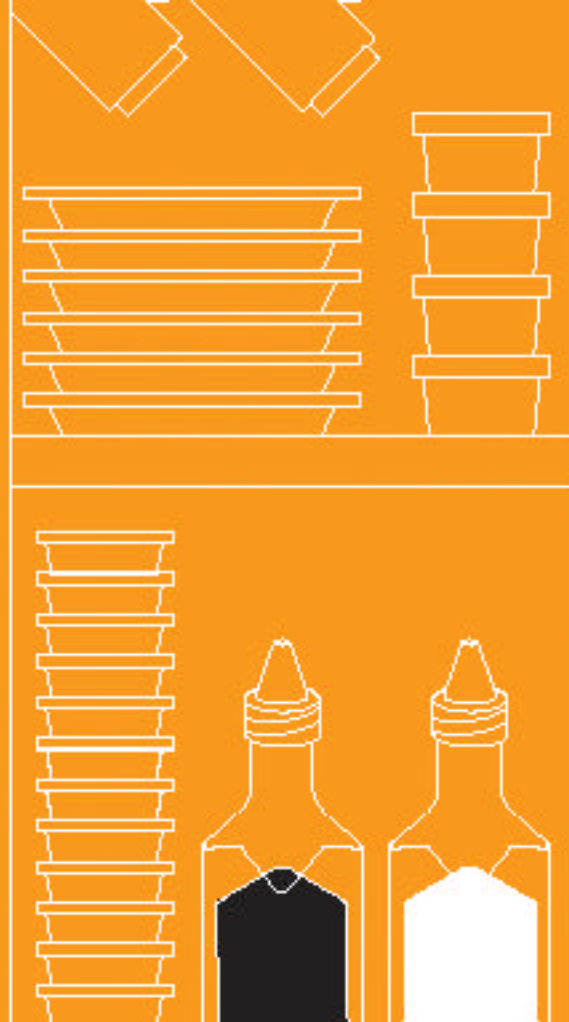
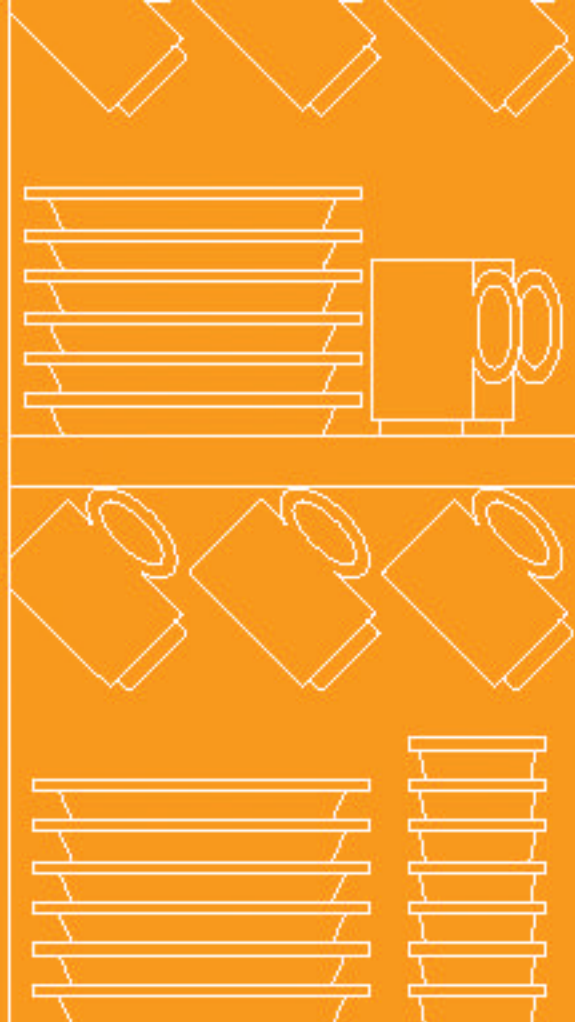
### 4.2.4 Where should we look?

1. Do we have existing partners where we could expand the relationship? Could they introduce us to someone else?
2. Strong personal relationships are a characteristic of virtually every effective partnership. Is there an individual who knows and believes in our organization whom we could "develop" as the basis for a partnership? How would we do that?
  - Are there individuals who know our organization who could introduce us to other like-minded people?
  - Do we have individuals in our organization who can introduce us to others?
3. As we scan our community, are there organizations (from any sector) where we see an overlap of mission or vision that would make us potential partners?
  - How can we meet them?
  - Should we be looking at starting relationships now that will allow us to build toward partnering in the future?

## 4.2.0 Know what you want questions to ask

### 4.2.5 What is our story?

1. Do we have the background information in place that partners are likely to want?
  - Our vision/mission
  - Our history and accomplishments
  - Our long-term and short-term objectives
  - Current programs
  - Whom we serve and why we are distinct
  - Annual operating budget and recent financial statements (and Revenue Canada charitable status if relevant)
  - Board of directors (names and affiliation) and staff (experience and qualifications)
  - Number of volunteers and their activities
  - Other key supporters and partners
  - Any other specific information related to a potential partner



# 5.0 Establish compatibility

It's surprising how two remarkably distinct ingredients can work so well together,  
yet keep their individual flavours when properly combined.

Setting the partnership framework

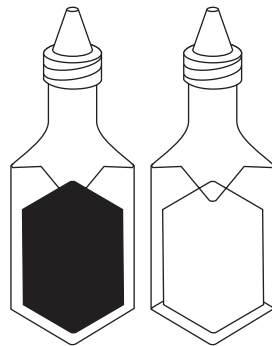
## Establish compatibility—setting the partnership framework

*The Partnership Framework is the "road map" to creation of the partnership. It involves information exchange at a high level between potential partners on the objectives of the partnership, how it will serve the mission and objectives of individual partners, the nature of the resources or activities which will be shared and identification of any risks or concerns which may be involved. It sets the stage for developing a detailed partnership agreement.*

### 5.1

#### What to do

	Done
1. Establish the purpose of the partnership and what each partner will commit.	
2. Identify how the partnership will serve the missions and objectives of each partner.	
3. If the partnership involves funding, determine how best to build accountability and equality in the partnership.	
4. Identify any risks or liabilities that might be created by the partnership.	
5. Determine how formal the partnership agreement needs to be.	



#### Goal

*Decide if you want to continue designing a relationship with the potential partnering organization.*

#### Foundation

*Before becoming too deeply involved, look at compatibility issues. Be sure both organizations are willing and able to share their organizational lives.*



## 5.2.0 Establish compatibility questions to ask

### 5.2.1 Our purpose

1. What is the purpose of the collaboration? Can it be summarized in a "mutual mission" statement that all partners will endorse?
2. What level and quality of interaction exists among senior leaders of both partners? Are individuals from each organization personally and emotionally committed to the collaboration?
3. Has each partner determined the functions and relative importance of existing partnerships or relationships in relation to the new partnership?
4. What is each partner committing to the partnership? Does each organization have the ability to execute that commitment?

### 5.2.2 Alignment of mission, strategy and values

1. Do the partners understand each other's reason for being and the work each does?
2. What are the mission, values and strategies of each partner? How will they be served by the mutual mission of the partnership?
3. Are the "cultures" of the partners compatible? Do we do things in the same way? Do we respect our differences?
4. What resources of each partner are of value to the other? What specific benefits will each partner get?
5. What social value will be created by the partnership?

### 5.2.3 The funder, the funded and funding

1. Partnerships that include a donation or funding create their own kinds of tension. If funding is involved, what are the expectations and requirements of the funding partner?
2. Does that require a particular reporting or monitoring protocol?
3. How will the contributions to the partnership by the funded organization be recognized and measured?
4. What steps will each partner take to build equality into the partnership?
5. If both partners are not-for-profit agencies, are there granting programs or other funding sources where they will compete outside the partnership? Does this require special recognition?

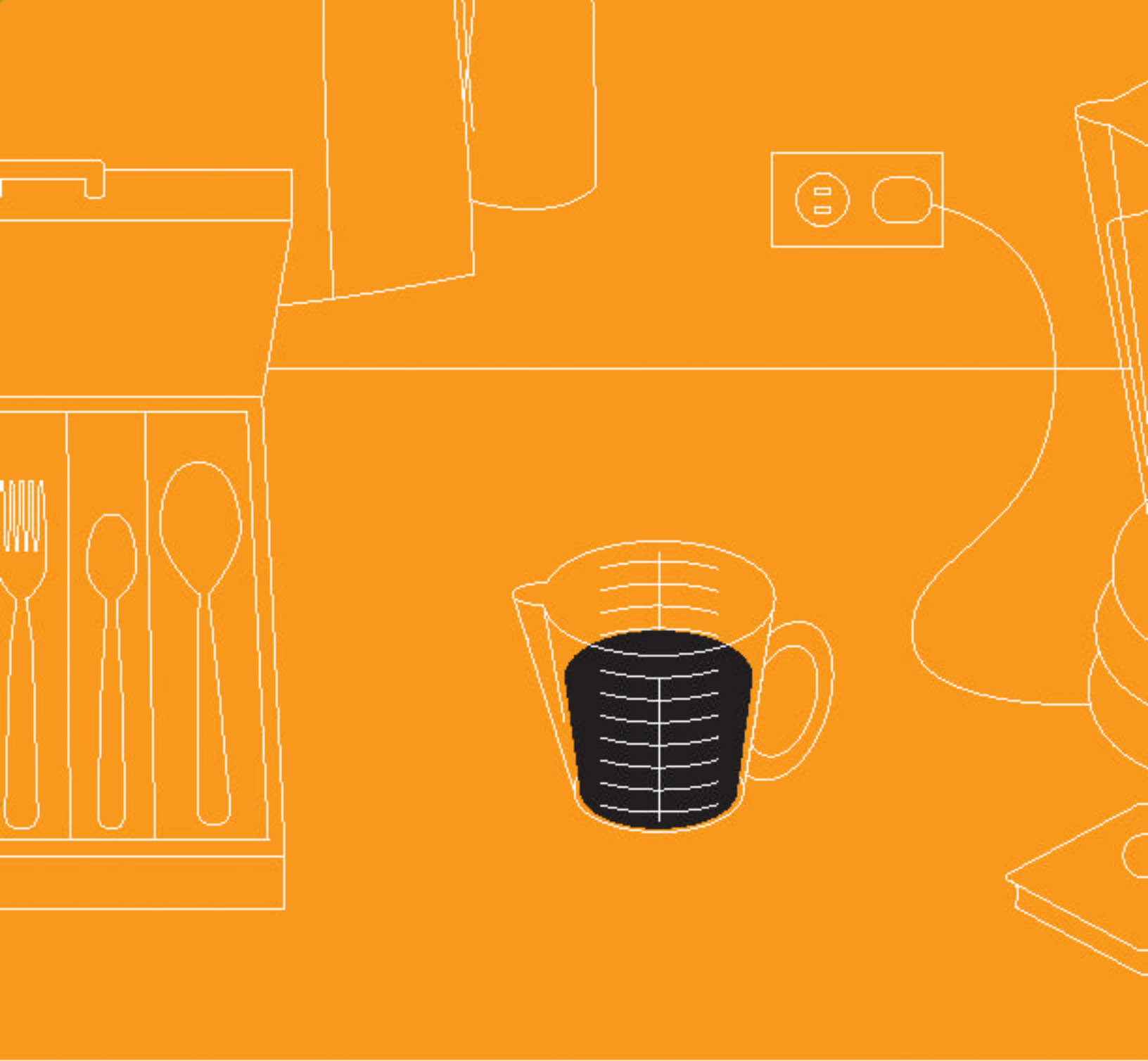
## 5.2.0 Establish compatibility questions to ask

### 5.2.4 Risk management

1. Does the partnership create legal or financial requirements that will need special attention?
2. Will the partnership create potential liabilities that need to be considered now?
3. What is the best way to deal with these potentially serious issues?

### 5.2.5 Communication between the partners

1. What level of respect and trust exists between the partners?
2. Is communication open and frank and is critical communication constructive?
3. Who will be the partnership relationship manager for each partner, accountable for ongoing communication?
4. Are we ready to go forward? How formal does our partnership agreement need to be? (e.g. handshake, exchange of letters, memorandum of understanding, formal contract)



## 6.0 Get the details right

When you are preparing something for the first time, it is vital to be precise. Do

you have all the necessary ingredients? Have you left anything out?

Writing the partnership agreement

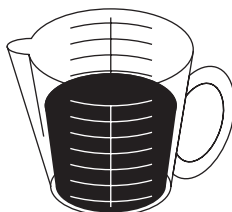
## Get the details right—writing the partnership agreement

*The following checklist is used to identify issues or design needs involved in committing to a partnership. The checklist is meant to be used by all partners—collecting this information is the beginning of the ongoing "sharing" that is at the basis of all partnerships. Certainly, not every question needs to be asked in every situation; however the checklist is intended to make sure that all necessary information is collected. It should also be regarded as a starting point—these questions are meant to identify both opportunities and concerns before the partnership starts. If issues do arise, they should be frankly dealt with before the partnership goes ahead. Partners do not have to agree on everything—if there are areas where partners "agree to disagree" they should be identified and acknowledged.*

## 6.1

### What to do

	Done
1. Define the objectives and activities of the partnership.	
2. Identify the roles of each partner.	
3. Determine the information needs of the partnership.	
4. Identify the resources required and who will provide them.	
5. Determine the communications approach and requirements of the partnership.	
6. Establish a timeframe for the partnership.	
7. Outline in detail how the partnership will be managed.	
8. Set up a conflict resolution procedure.	
9. Determine how to monitor and evaluate the partnership.	
10. Write the detailed partnership agreement.	



### Goal

*To have an agreement addressing basic structural building blocks.*

*The level of detail may vary, depending on the circumstances.*

### Foundation

*Goal and process issues must be addressed before the partnering relation begins. The starting points should be created, even if the flow of circumstances leads to changes down the road.*

## 6.2.0 Get the details right questions to ask

### 6.2.1 Objectives of the partnership

1. What are the objectives of the partnership?
2. If the partnership is based on specific activities, what activities are expected from each partner? What activities are jointly based?
3. Can a high-level "partnership fit" statement (including the mutual mission, the overall objectives of the partnership and what is expected from each partner) be developed?

### 6.2.2 Partner roles

1. Who are the primary decision-makers for the partnership?
2. Are existing program(s)/activities of any partner effected by the partnership? Does this require attention before proceeding?
3. Is there a dedicated staff or an ad hoc team to lead and manage the partnership?
4. Who is funding the partnership?
5. What is the anticipated overall cost/resource requirement of the partnership?
6. Is there a champion for the partnership in each organization who is willing to become involved and overcome organizational hurdles?
7. How will the partners address personnel changes (either staff or volunteer) which might effect the partnership?

### 6.2.3 Determining what information is required

1. What are the objectives, benefits and risks of the partnership?
2. Who are the people being served and what input is required from them?
3. What skills or information are required from each partner?
4. What are the complimentary strengths and resources of the partners?
5. What are the weaknesses of the partnership?
6. Are there any special geographical or demographic considerations in this project?

## 6.2.0 Get the details right questions to ask

7. Are there formal legal/financial/information considerations that must be analyzed and addressed?
8. What level of consensus is required among partners to complete the project?
9. Are there "escape" clauses if the partnership does not work well?
10. Are partners prepared to be flexible as the needs of the project change and work in new ways to achieve results?

## 6.2.4 Securing resources

1. What resources are required? (e.g. financial, expertise, staff, equipment, technology)
2. What resources will each partner contribute to the project?
3. What restrictions exist on partners in committing resources?
4. Are the partners financially secure? Do they have the non-financial resources necessary for success of the project?
5. What is the workload demand on the staff of each partner?

## 6.2.5 Communication

1. What level of public profile or external communication does the partnership require or want?
  - Do the contributions of each partner need to be recognized?
  - How will this be done and who will do it?
2. Is there a need for a formal communications process in the partnership itself? How often will the partners meet?
3. How will partnership activities, challenges and successes be communicated to each partner?



## 6.2.0 Get the details right questions to ask

### 6.2.6 Setting the timeframe

1. When and how will the partnership begin?
2. How long is the partnership expected to last?
3. What are the milestones that will be used to mark progress?
4. If development work needs to be done before the partnership provides products or services, when will this work be completed?
5. What are the regular reporting requirements of the partnership?
6. What is the timeframe for high-level partnership review?
7. Is there a need to set a date to re-confirm, renegotiate or abandon the partnership?

### 6.2.7 Managing the partnership

1. What are the personnel requirements for ensuring the partnership is adequately managed? From where will human resources come?
2. Who will be accountable for partnership performance and results? (e.g. partnership staff, one of the partners, etc.)
3. Does any partner have formal reporting requirements? (e.g. program conditions of a government agency, funding policy in a private sector partner)
4. In what form and how often will the partnership report? To whom?
5. Are there liability or legal issues which require separate attention? Who will do that?
6. What level of formality is required to formalize the partnership? (e.g. exchange of letters, memorandum of understanding, formal contract) Who will develop this?
7. Who is responsible for managing the communications process? How will success and positive experiences be recognized and communicated?
8. Will the partnership acquire capital assets? If so, who will own them and how will they be disposed of if the partnership is ended?

## 6.2.0 Get the details right questions to ask

### 6.2.8 Conflict resolution

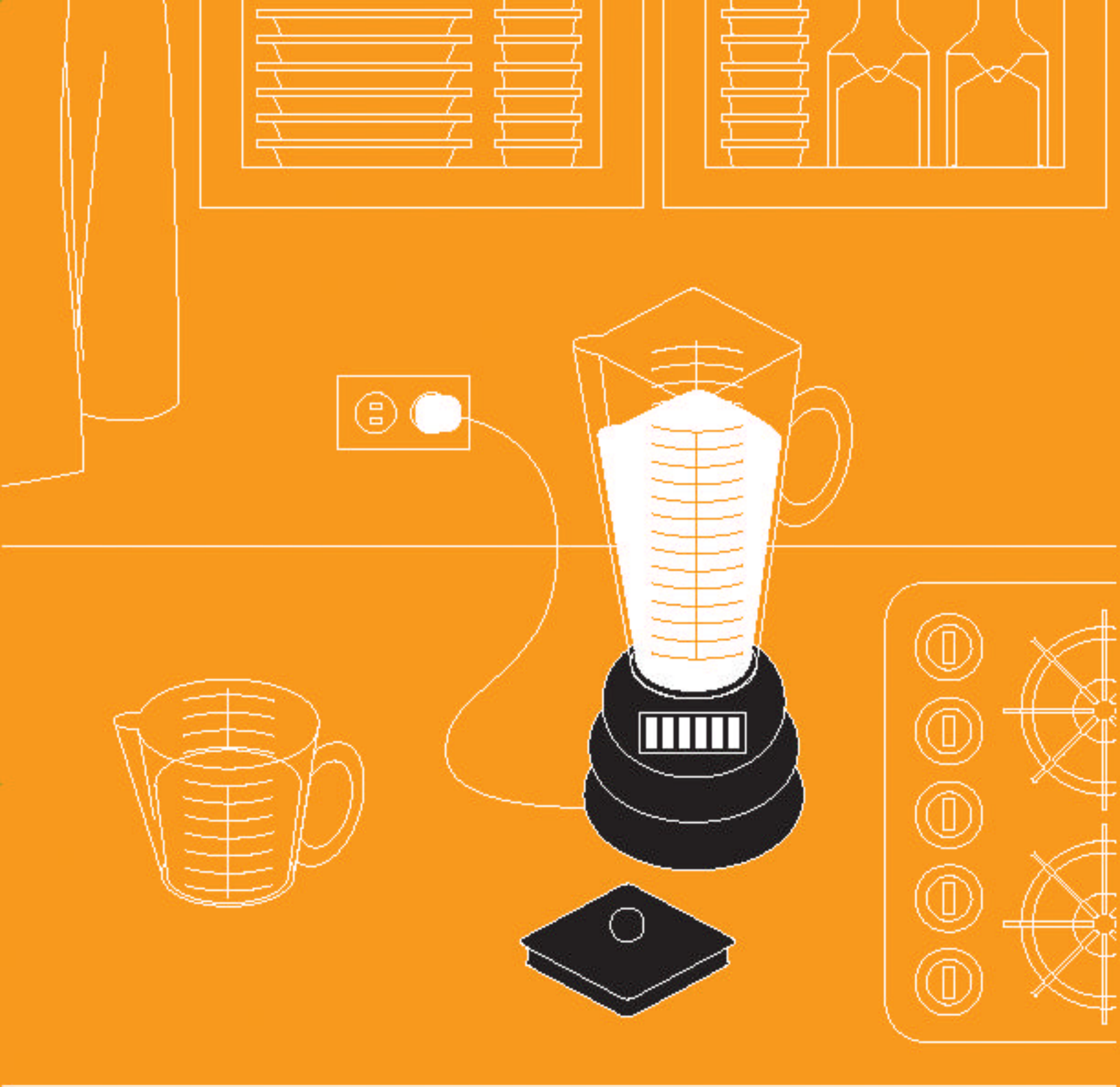
1. Has the design process identified areas of conflict (issues where we "agree to disagree" but still proceed with the partnership) which need to be monitored? What are they?
2. Have any potential areas of conflict or disagreement been identified?
3. Is there a mechanism for partners to safely raise issues of conflict?
4. Does the partnership need to devise a formal process to acknowledge and resolve conflict?

### 6.2.9 Outcomes and evaluation

1. Does the partnership have measurable outcomes and, if so, what are they?
2. Do individual partners have measurable outcomes expected of the partnership? Are other partners enrolled in producing these outcomes?
3. Are there processes or developments in the partnership which need to be regularly reviewed?
4. Is there a structured process for each partner to review and comment on their partnership experience?
5. How will the collective learning of the partnership be captured?
6. As the partnership grows and succeeds, is there a process to evolve to a higher level of commitment and interaction?
7. If there is a leadership change in individual partners—or the people committed to the partnership—how will it be addressed?

### 6.2.10 Final notes

1. Do we have enough information to proceed?
2. Are the missions and values of the partners genuinely compatible?
3. Do the partners understand and accept each other's agenda?
4. Does the partnership require a written agreement? How formal does it need to be?



# 7.0 Being a good partner

With the right know-how, it's remarkably easy to blend ingredients for a smooth, enjoyable mix.

Making the partnership work

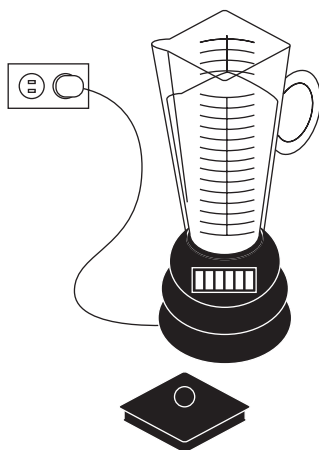
## Being a good partner—making the partnership work

*The secret to making partnerships work is simple: meet commitments and communicate, communicate, communicate. Particularly during the start-up stage, it is important that the partnership relationship managers communicate frequently—not just about the partnership itself but also with each partner. Communication takes time and it is important that this time commitment is recognized as the partnership is being formed. Partnerships are living, changing relationships—issues or opportunities that were not considered when the partnership was established will come up and should be addressed quickly. As the partnership moves along, regular monitoring and evaluation are required to ensure the benefits of the relationship are maximized.*

## 7.1

### What to do

	Done
1. Establish a framework for ensuring all partners are meeting their commitments and that the partnership agreement is realistic.	
2. Review communication commitments on a regular basis.	
3. Monitor the measurable or observable results of the partnership.	
4. Look to the future—are milestones being met?	



### Goal

*Take the time to work together.  
Manage the partnership as well  
as you manage your own  
organization.*

### Foundation

*Partnering relationships need  
care and attention to stay healthy.  
Organizations working together  
have the same needs as people  
working together. Amongst the  
rules: Do what you said you  
would! Communicate often!*

## 7.2.0 Being a good partner questions to ask

### 7.2.1 Meeting commitments

1. Are all partners meeting their commitments to the partnership?  
Have any unforeseen circumstances developed?
2. In addition to the mutual mandate of the partnership, are the goals of each partner being met?
3. Has anything happened that requires us to revise the partnership agreement? Where should the review start?
4. Is money spending/resource allocation under appropriate control?
5. Is the partnership overall being managed effectively?

### 7.2.2 Communication

1. Is communication regarding the partnership strong?
2. Are external and community communications proceeding as defined in the detailed agreement?
3. Are partners comfortable with the information flow between partners, the conduct of their partners and each other's agenda?
4. Are results being adequately communicated back to each partner?
5. Are partners raising concerns or issues in a timely way?

### 7.2.3 Reaching our goals

1. Are the goals and processes identified in the detailed agreement regularly reviewed by both partners? Are the "outcome and evaluation" sections of the agreement regularly reviewed?
2. Are the overall objectives of the partnership being met?
3. Are the specific measurable goals of the partnership being met?
4. Do the overall objectives or measurable goals need to be revisited?

7.2.0

Being a good partner questions to ask

7.2.4

Looking to the future

1.

Have conflicts arisen? Have we discovered issues or concerns that were not addressed in our initial agreement? Are they being brought forward and addressed?
2.

Are the partners maintaining flexibility as the partnership moves forward and the agenda changes?
3.

Are objectives and milestones being met? Do new milestones need to be set?
4.

Are customer requirements (as opposed to partner requirements) being met? Should the bar be raised?





## 8.0 Make it better

When it's just the two of you, there are a number of "little things" you can do to enhance the experience. Bring out your best silver and prepare to toast your efforts.

Evaluating and enhancing the partnership

## Make it better—evaluating and enhancing the partnership

## Goal

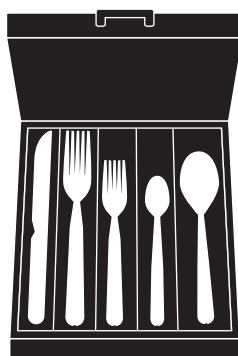
*Design a regular time to look back on experience, consider how to go forward and provide status reports to the partners.*

## Foundation

Partnerships need planned occasions to step out of "doing," reflect on performance and communicate the results. Is the partnership living up to expectation? Could it be expanded? Is change required?

## What to do

What to do	Done
1. Determine how the partnership is performing regarding its objectives, its measurable goals and its qualitative goals.	
2. Determine if the vision and expectations of each partner are being met.	
3. Capture the learning of the partnership and determine if it can be enhanced.	



## 8.2.0 Make it better questions to ask

### 8.2.1 Evaluating the partnership

1. Overall, is the partnership moving towards its objective? Are we still committed to our "mutual mission"?
2. Are the measurable goals of the partnership being met?
  - Have we discovered the need for other measurable goals?
  - Do our targets need to be changed?
  - Are all partners comfortable we have the right measurable goals?
3. Are the subjective goals of the partnership being met?
  - Have the assumptions that we made about these goals when we established the partnership proved to be true?
  - Have we learned from experience that they should be changed? Or that others should be added?
  - Should we be stretching our subjective targets?

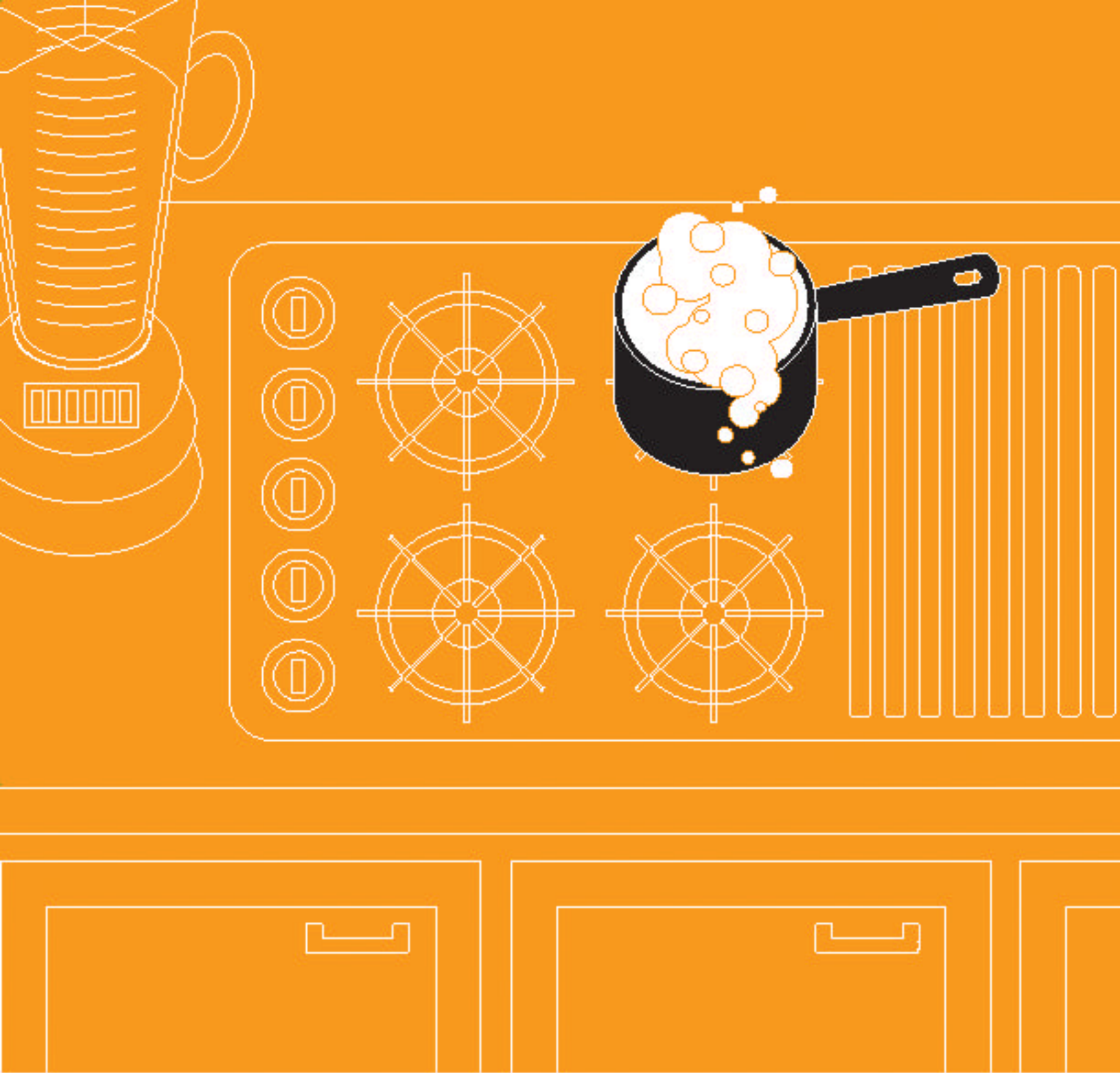
### 8.2.2 Meeting partners' vision and expectations

1. Is the partnership serving the vision and objectives of all partners as well as the mission of the partnership itself?
  - What were the vision and expectations of each partner and are they being met?
  - Have those changed—or should they change?
2. What has each partner learned from the partnership experience?
  - Are these learning experiences being captured and can they be applied elsewhere?
  - Have any circumstances arisen that effected the partnership?

## 8.2.0 **Make it better** questions to ask

### 8.2.3 **Enhancing the partnership**

1. Based on our experience, do we want to expand the partnership?
  - Do we want to increase the commitment to the event or program involved?
  - Do we want to expand our partnership to other activities?
  - Can we increase the involvement of our organization or our members in the partnership?
  - Do we want to add other partners to increase our effectiveness?
2. Can we further help our partner?
  - Would the story of this partnership or our experience in this partnership encourage other organizations to partner?
  - Are there "friends" of our organization whom we could introduce to our partner as potential future partners?
3. Can our partner further help us?
  - Have we discovered anything in the relationship that could further our mission as well?
  - Could that be used to also further the mission or objectives of our partner?



## 9.0 When things go astray

Sometimes issues can simmer below the surface, and if you're not careful they will boil over. How can you prevent things from going wrong?

Handling conflict

## When things go astray—handling conflict

*Partnerships that are not working and cannot be healed waste the scarce resources of all partners. Partnerships also accomplish their objectives—events are held, programs succeed—and the best result is to document the results, shake hands and say “we’ll partner again sometime.” Knowing when to end a partnership may be as important as knowing when to enter one.*

## What to do

What to do	Done
1. Use this kit as a framework for finding what the real source of conflict is—and then use the kit to address the issue.	
2. If the differences are irreconcilable—or if the partnership has reached an end—work together one more time to create a friendly dissolution.	



*Come out of it a winner by  
either resolving the conflict or  
parting friends.*

Differences will arise in partnering relationships. If the differences become issues or conflicts, pay attention. Small problems not addressed become large problems.

## 9.2.0 When things go astray questions to ask

### 9.2.1 Diagnosing the problem and addressing it

Make sure you go through the whole list of questions below—more than one issue may be causing the conflict. Once both partners agree on where the conflict lies, use the questions in that section to frame your discussion on what action is required.

1. Has either partner found that there are issues (e.g. concerns regarding intrusion on their mandate, time commitment) which they did not adequately consider before entering the partnership?  
**Go to section 3.0 and review the questions there.**
2. Does the conflict lie in assumptions we made about each other than have turned out not to be true? **Review the questions in sections 4.0 and 5.0.**
3. Does the conflict stem from differences regarding the overall strategy and purpose of the partnership? **Review the questions in 5.0.**
4. Did we overlook required details or get them wrong in the agreement? **Review section 6.0.**
5. Does one partner feel the other is not being a "good partner"? **Review section 7.0.**
6. Does the conflict lie in evaluating our progress and outcomes? **Review section 8.0.**

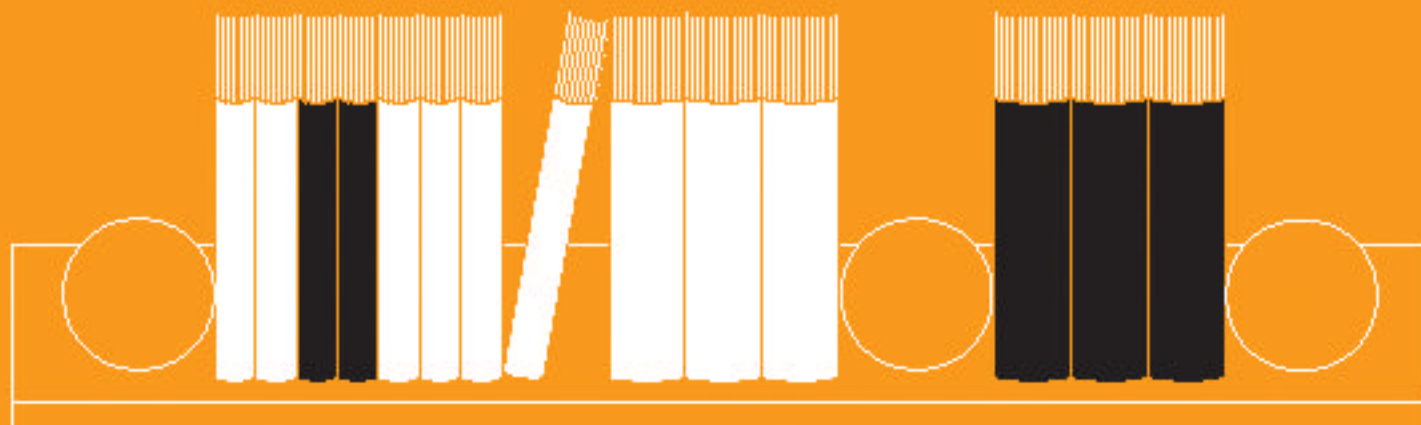
### 9.2.2 Is it time to end the partnership?

1. If the identified conflict cannot be resolved, how can the partnership best be dissolved?
  - Should one partner take over the event or program?
  - Should the initiative be ended?
  - If there are outstanding commitments, how will they be met?
  - If the partnership has assets, how will they be shared?
  - How can this be done so that all parties maintain the respect for each other that originally caused them to become partners?

## 9.2.0 When things go astray questions to ask

2. If the partnership has accomplished its objectives, how can we best establish a base for the future while ending the current partnership?
  - Have we adequately communicated the partnership's success to the broader community?
  - As the partnership comes to an end, can we summarize what we have achieved?
  - Have we documented the success of the partnership so that our experience is useful to others?
  - Have we identified opportunities or conditions where we might consider partnering in the future?





# 10.0 Appendix

For more tried-and-true recipes for successful partnerships, we recommend a number of valuable guides and resources. Bon appetit!

[More resources](#)

## 10.0 Appendix

*For referrals to appropriate literature or programming, contact*

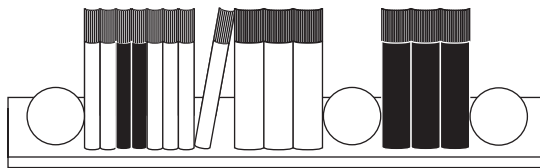
*Laurie Kolada*

*Alberta Community Development*

*(780) 422-2203*

*laurie.kolada@gov.ab.ca*

*This kit can be downloaded from [www.cd.gov.ab.ca/wrf/](http://www.cd.gov.ab.ca/wrf/)*



### Goal

*To have access to appropriate resources, when they are needed.*

### Foundation

*Conscious choices prevent avoidable problems and help solve unavoidable difficulties and issues. There is help available if you look for it.*