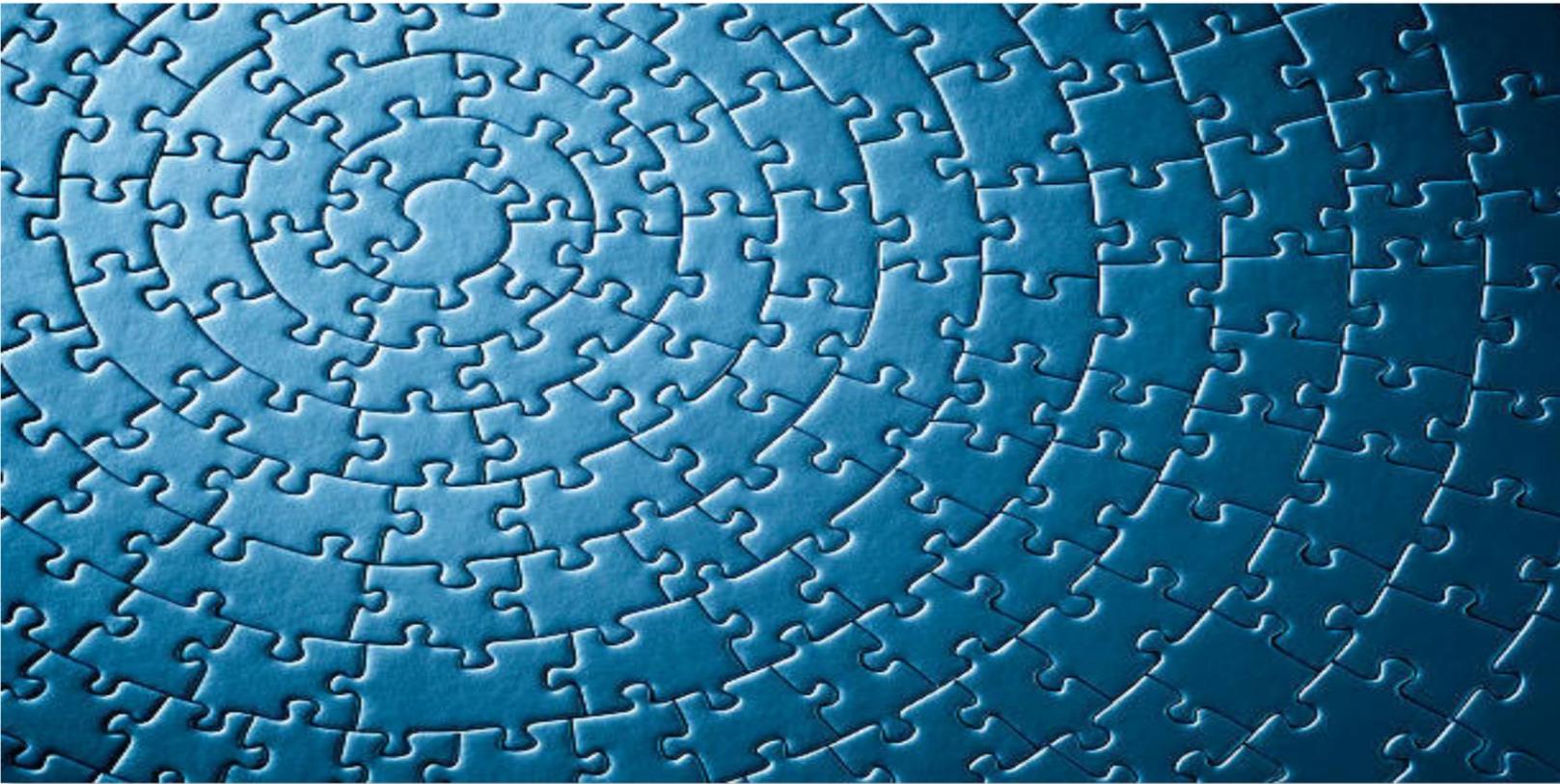


ROBINS

FOUNDATION



Partnerships: Framework for Working Together

July 2018

Checklist for Setting Up and Maintaining the Partnership

Note: Please use the information found in the *Partnerships: Frameworks for Working Together* document on pages 15 through 16 to guide your discussion, agreements and completion of this document.

CHECKLIST FOR SETTING UP AND MAINTAINING THE PARTNERSHIP (1-5)

1. Is there a genuine shared vision and set of goals across the partnership?

- A common understanding of, and agreement to, the vision and objectives needs to be reflected in any project brief, business plan, terms of reference, and/or work program.

Document the vision and agreed goals here:

2. Are there clearly identified objectives that all partners can articulate and agree to?

- The partnership's objectives and goals need to be reflected in its actions and practices.

Document accepted objectives here:

3. Is the purpose of the partnership clear? Are the leaders and all other members are clear on what their roles and responsibilities are?

- Leaders and all other members need to agree and understand what their role and responsibilities are within the context of the purpose and outcomes of the partnership. All partnering organization participants need to understand their role in collective decision making, delivering activities and representing the partnership.

Document roles and responsibilities of leaders and other members here:

4. What skills and competencies do we need to manage and support the partnership? Has a full assessment been made of the skill and competencies required to support/manage the partnership?

- The partnership needs to understand what skills and competencies it will need to achieve the agreed goals, as well as to ensure processes are effective. Consideration will need to be given to making training resources available.

Document skills and competencies here:

5. To whom will the partnership report? Is there a process to report on progress?

Document lines of accountability/reporting processes here:

CHECKLIST FOR SETTING UP AND MAINTAINING THE PARTNERSHIP (6-9)

6. Is there an accepted process for decision-making? Who is the accountable individual for the partnership?

- The decision-making process needs to be understood by all members of the partnership. Decisions should be made through recognized processes with partners having equal power. Processes for decision-making need to define a quorum, how decisions will be recorded, and how disputes will be settled.

Document processes for decision-making here:

7. Is there an accepted performance management framework? Are processes in place to monitor performance and act on results? Do defined criteria exist against which to benchmark achievements?

- Individuals responsible for delivery of the plan to the partnership need to be specified.

Document performance management framework here:

Document the criteria to benchmark achievements here:

8. Is there an accepted commitment to joint investments/resources to support the partnership by all the organizations/individuals?

- Resources mean more than just money; they include time, knowledge, energy and personnel.

Document the accepted commitment to joint investment/resources here:

9. Is there a robust communication strategy in place? Do partners know about each others' organizations and what the pressures and imperatives are? Do partners talk to each other about their organizations agendas and priorities?

- It is important to have an effective communication system in place at all levels within the partnership and within partner organizations, sharing knowledge and information.

Document the communication strategy here:

CHECKLIST FOR SETTING UP AND MAINTAINING THE PARTNERSHIP (10-13)

10. Are there accepted ground rules for partnership work that include the reconciliation of different organizational cultures and ways of working?

- Being open and honest, communicating and exchanging information in open networks will also help to build trust within the partnership.

Document accepted ground rules here:

11. Is there an accepted program for partners to invest time so they can identify and agree to the vision, goals and targets?

- It is important at the initial stages of setting up the partnership that members agree on the vision, goals, and targets. The requirement for and stated outcomes of “away days” need to be documented in Terms of Reference or partnership agreements. It is important to repeat this exercise to review these goals and targets, checking that they are on track.

Document the process established to agree on vision, goals and targets, and how these will be monitored and evaluated here:

12. Is there a clear, measurable plan for administering the partnership? Is the plan clearly linked to partnership goals and objectives, and do all parties agree to this plan?

- Any partnership needs to have structure and processes so members clearly understand its purpose, goals, objectives, and outcomes. The plan should also identify the process to review/update goals and outcomes when monitoring reveals it is out of date or reflects changing circumstances.

Document the administration plans here:

13. Are clear processes in place to ensure all new members of the partnership are well informed of its purpose, goals, and objectives?

- As the partnership grows and existing members leave, new members come on board. It is important that each new member has a clear understanding of the purpose of the partnership. Spend time to induct new members into understanding and supporting the partnership’s goals.

Document the “orientation processes” utilized for new members here:

TIPS FOR SETTING UP AND MAINTAINING THE PARTNERSHIP

- ✓ Agree on the structure, process and support mechanisms for the partnership
- ✓ Agree on the main purpose/priorities
- ✓ Agree on the performance management process.
- ✓ Identify a work program

Partnership Norms Template

An initial step in adopting partnership norms is to identify what your group values in collaborative working relationships. Listed below are a few general areas and probing questions as examples.

Note: Please use the information found in the *Partnerships: Frameworks for Working Together* document on pages 20 through 23 to guide your discussion, agreements and completion of this template.

WHERE CAN YOU ESTABLISH PARTNERSHIP NORMS	WHAT ARE YOUR SHARED VALUES?	PARTNERSHIP NORM AGREEMENTS
<p>Communication</p> <p>Perspective gathering questions:</p> <ul style="list-style-type: none"> ➤ What is important to you when you are talking to someone? ➤ How do you communicate that you are looking for solution versus looking for understanding? ➤ What methods of communication work best for you? (email, phone, in person, etc.) 		
<p>Resource Management</p> <p>Perspective gathering questions:</p> <ul style="list-style-type: none"> ➤ What issues have you experienced in sharing your resources with others in collaborative partnerships (equipment and supplies, facilities, professional contacts, etc.)? ➤ What is an effective way for us to share our resources? 		
<p>Decision-Making</p> <p>Perspective gathering questions:</p> <ul style="list-style-type: none"> ➤ What has been your experience in collaborative decision-making? What do you find works best? ➤ How do you like to be involved in solving collaborative issues? ➤ When should a final decision be made (after we achieve complete consensus, after we have majority consensus, or after everyone has had the opportunity for feedback)? 		
<p>Conflict Resolution</p> <p>Perspective gathering questions:</p> <ul style="list-style-type: none"> ➤ How do you approach conflict in relationships? ➤ What effective mediation strategies have worked for you? ➤ How personally do you internalize work conflicts? 		

Collaborative Work Plan Worksheet/Template

The following worksheet can be used to help develop a collaborative work plan. Some of these items will have been developed during the completion of the Checklist for Setting Up and Maintaining the Partnership.

CONSIDERATIONS	SAMPLE STRATEGIES: <i>These are illustrative but not exhaustive sample strategies. Adapt, add-to, or delete these sample strategies as you see fit for your partnership.</i>	WHAT STRATEGIES WILL YOU IMPLEMENT AND HOW WILL IT BE DONE?	STATUS
Establishing and Maintaining Buy-In	<ul style="list-style-type: none"> • Openly communicate the goals and objectives of the project. • Understand each member's stake or interest in the partnership's success. • Provide opportunities for people to give input on how goals and objectives can be achieved. • Continually communicate the progress to plan. • Remind collaborative members about the big picture. 		
Being Realistic	<ul style="list-style-type: none"> • Concentrate your efforts on a few specific areas that re explicitly linked to the partnership's aims and do not focus on too many broad issues. • Regularly assess your deliverables, time frames and allocated resources and revise as necessary. • Distribute work equitably. • Ask your peers to review the work plan and provide feedback on what is feasible given your resources. 		
Having Measurable Results	<ul style="list-style-type: none"> • Identify at least one indicator of success for each specific task. • Identify short, intermediate and long-term outcomes you expect to achieve as a result of your collective work. 		
Being Accountable	<ul style="list-style-type: none"> • Have specific due dates for tasks and goal completion. • Clearly identify who is doing what. • Regularly review and communicate progress to plan. • Remind collaborative members about the big picture. 		
Other			