

partnership tools

Tool 1: Partnership Ready Checklist

Tool 2: Finding the Right Partner Checklist

Tool 3: Partnership Agreements

Tool 4: Memorandum of Understanding
– A Partnership Agreement

Tool 5: Effective Communications

Tool 6: Evaluating the Partnership and its Program

Tool 7: Exiting Partnerships Painlessly

Tool 1: Partnership Ready Checklist

Part A

This Tool is designed to ensure that your organisation considers some important questions before you enter into a partnership and the reasons for entering a partnership.

The reason(s) for partnering for my business is:

.....

.....

.....

.....

.....

Some of the benefits and risks of partnering for my business are: (Refer to pages 15-17 of the *Partnering with Community Organisations: A Toolkit for Small to Medium Sized Businesses* for some ideas):

Benefits	Risks

Tool 1: Partnership Ready Checklist

What are the strategies that will be developed to minimise the identified risks?

.....

.....

.....

.....

In partnering with a community organisation, my business could offer:

Time (staff volunteering hours)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount <input type="text"/>
Cash	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount <input type="text"/>
Space	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount <input type="text"/>
Equipment and other in-kind contributions	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount <input type="text"/>
Networking	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount <input type="text"/>
Accredited First Aid Training	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Person <input type="text"/>
Pro bono services (e.g. legal, IT)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Person <input type="text"/>
Skills in financial planning	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Person <input type="text"/>
Skills in IT	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Person <input type="text"/>
Skills in marketing and communication	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Person <input type="text"/>
Skills in business management systems	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Person <input type="text"/>
Training in Occupational Health and Safety	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Person <input type="text"/>
Other (describe)			

.....

.....

.....

If skills or training are being offered, is the nominated employee(s) willing and has the time to commit to the partnership?

Yes No

Tool 1: Partnership Ready Checklist

Part B

Having established the reason(s) for a partnership, you should determine the degree to which your organisation is ready to partner.

A 'Yes' next to the question indicates a readiness to partner while a 'No' indicates that, at this stage, either your organisation is not ready to partner, or that there are **areas that need to be addressed** before you enter into a partnership.

<p>Do you have support from your staff and other important stakeholders?</p> <p>What are their concerns and issues?</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Why</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Do you have the time to commit?</p> <p>How much time (weekly, fortnightly, monthly)?</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Why</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Does your organisation and its staff value the idea of working with other organisations and groups?</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Why</p> <p>.....</p> <p>.....</p> <p>.....</p>

Tool 1: Partnership Ready Checklist

<p>Is your organisation willing and able to share and learn from other organisations and groups?</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Why</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Do you have the resources (financial and non-financial) to commit?</p> <p>List these:</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Why</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Can you identify someone who will manage the partnership?</p> <p>What are this person's skills:</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Why</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Do the benefits associated with partnering outweigh the risks?</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Why</p> <p>.....</p> <p>.....</p> <p>.....</p>

Tool 2: Finding the Right Partner Checklist

A partner should be carefully selected based on common aims and the alignment between your partner’s culture and objectives and yours. For example, if you are an alcohol beverage company, it is not wise to approach a community organisation supporting those recovering from alcohol, or their families.

Brainstorm the type of partner organisation you want, and try to align this with your organisation. For example, if you are a real estate agent, a community organisation working with homelessness might be a good value fit. If you are an IT company, working with a small organisation to build their internal IT capacity might be a good fit.

Think about the size of the organisation you want to partner with. For example, a large community organisation with effective IT infrastructure is unlikely to be interested in IT support. A small community organisation may not have the staff to dedicate to writing formal reports to a business partner with complex reporting guidelines.

List the partnerships characteristics that are most important to you. (This might be business interest, ethical values, personal interests and/or cultural values)

This checklist is a prompt, **not** an interview guide. Use it as the basis for an informal conversation, preferably face-to-face, with your potential partner and as a way to explore their organisational alignment with yours.

.....

.....

.....

.....

My potential partner has what my organisation needs because it has ...	Evidence	To make a final decision, I need the following information:
The skills and competencies that are important to and complement my organisation		
Networks that are important to and complement my organisation		
Resources (e.g. services and knowledge) that are important to and complement my organisation		

Tool 2: Finding the Right Partner Checklist

My potential partner is willing and able to partner because it ...	Evidence	To make a final decision, I need the following information:
Is respected by its peers and within its community		
Has good management and governance structures		
Has a stable workforce		
Has commitment from senior management		
Can dedicate time and resources to the partnership		

Tool 2: Finding the Right Partner Checklist

There is alignment between both organisations because ...	Evidence	To make a final decision, I need the following information:
Both have similar interests, values and organisational cultures		
Both are willing to share their knowledge and resources		
Both are willing to be flexible and learn from each other		
Both share similar visions and objectives about partnering		
Both see themselves working with the other		
There are mutual benefits to partnering		

Tool 3: Partnership Arrangements

Once your organisation has identified that it is ready to partner, and you have found the right partner, you can begin to consider the type of partnership you both want. It is important that your partnership begins with something relatively small and evolves into something more complex as the partnership matures – get some early ‘wins’ as this builds confidence between partners.

There are two main partnership arrangements (see page 14 of the *Partnering with Community Organisations: A Toolkit for Small to Medium Sized Businesses*). Of course, your partnership might be a combination of both. Determine which arrangement is the best for you. Some questions you should ask:

1. What are the partnership tasks (e.g. single/multiple, simple/complex, large/small tasks)?
2. What is the commitment of the partnership (e.g. short-term/long-term)?
3. How formal or informal will the partnership be?
4. What type of coordination/resources will be required to achieve the partnership aims and vision?

At this stage, it is important that both partners agree on the vision and aims of the partnership as well as the tasks required to achieve those aims.

It is also advisable that you identify each partner’s level of support and contributions as well as their roles and responsibilities.

	Vision and Aims	Commitment (e.g. resource contributions)	Tasks and Timelines	Roles and Responsibilities
My Business				
My Partner				

Tool 3: Partnership Arrangements

TIPS

Shared Vision

It is important that partners share a common vision, so there is an agreement on what the future could look like as a result of the partnership efforts. Once partners determine their vision, it is easier to then identify the specific aims and what you hope to achieve from the partnership.

Aims and Achievements

To make your partnership vision a reality, begin to identify the partnership aims and what it will achieve. These should be measurable in order to determine if the partnership succeeded in doing what it set out to accomplish.

Roles and Responsibilities

Recognise the importance of each partner's role in achieving the partnership aims. Define and outline each partner's role and ensure that there is common understanding of what is expected.

It is important to note that successful partnerships do not necessarily involve equal role sharing. The idea is that partners should play complementary but separate roles and partners may be responsible for different functions, or they may work together on joint tasks or activities.

Tool 4: Memorandum of Understanding – A Partnership Agreement

A Memorandum of Understanding (MoU) or Partnership Agreement is a written agreement or understanding defining how partners will work together. An MoU is an excellent way to formalise your partnership. It can act as a reference point to ensure you are staying on track with the original aims of the partnership. It can be as detailed or as broad as each partner feels comfortable with, but usually an MoU outlines the partnership activities and partner roles and responsibilities. An MoU can also include reporting protocols, how decisions will be made and even the partnership exit strategies.

Attached is a *draft* MoU that can be adapted, altered or adjusted to suit your specific partnership. Remember that your MoU should allow for change as the partnership develops and matures.

Tool 4: Memorandum of Understanding – A Partnership Agreement

Memorandum of Understanding (MoU) between [insert name of Partner A] and [insert name of Partner B].

This Memorandum of Understanding does not permit the use of copyright materials (including logos) and dissemination of confidential information, or allow staff of the organisations to represent each other without prior written agreement.

This Memorandum of Understanding outlines the framework of a working relationship between the parties. It is not intended to constitute a contract but is built on goodwill, and binding in honour only. The activities outlined in Section 6 and Section 7 are illustrative only, and any working arrangement in respect of these or other activities or projects may, if deemed necessary, be defined in separate agreements.

This document consolidates discussions held between [insert name of partners] and as such, outlines the shared aims of the organisations and proposed areas for a partnership.

1.0 ORGANISATIONS

1.1 Name of Partner A

(ABN: ** *** ***) having its registered office at [insert address]

1.2 Name of Partner B

(ABN: ** *** ***) having its registered office at [insert address]

PREAMBLE

Preambles are not necessary in an MoU but it can be useful to outline the background to the partnership.

3.0 STATEMENT OF PURPOSE

This is a Memorandum of Understanding (MoU) between [insert names of partners]

The 'Parties' enter into this arrangement with the intention of working cooperatively to broadly [acknowledge the partnership aims and commitment].

By working together as partners, we see the benefits and added value that each of us can bring to address this concern/fulfil this commitment.

This MoU confirms the principles of both partners working together recognising the specific roles and responsibilities of each party.

Tool 4: Memorandum of Understanding – A Partnership Agreement

4.0 SHARED VISION & COMPLEMENTARY RESOURCES

The partner organisations share a common vision of the value of partnering as a means of achieving positive change in the community – that is, contributing to the wellbeing and sustainability of the community. This vision manifests itself in the following ways:

- >> a belief in the value of the partnership;
- >> the ability to identify synergies in each others' work as a means of increasing overall effectiveness and achievement;
- >> the ability to build on each others' existing strengths, both internal and external;
- >> the understanding that sharing information with each other builds expertise and skill; and
- >> mutual respect.

[State the partnership vision here]

5.0 AIMS

Recognising the skills and resources of individual partners, and the shared vision, the aim of the partnership is to work together to identify and develop opportunities to: [state what the partnership aims to do and how it will do it].

6.0 ACTIVITIES, ROLES AND RESPONSIBILITIES

By working together, the partners recognise the benefits and value that each can contribute to the partnership. Initial focus will concentrate on, but not be limited to, the following themes/activities:

[List the activities that have been identified as the priorities of the partnership with individual names of those taking the lead responsibility and timelines next to each activity].

7.0 RESOURCES & COMMITMENT

Each partner will commit to:

[Insert the partnership commitment (e.g. duration of)]

Each partner will provide the following resources:

[Partner A: List the financial and non-financial resources]

[Partner B: List the financial and non-financial resources]

Other resource requirements will be addressed on a program-by-program basis and will be determined by negotiation with relevant stakeholders.

Tool 4: Memorandum of Understanding – A Partnership Agreement

8.0 NOTICE

Any party for any reason giving 30 days notice in writing by pre-paid post may terminate this Memorandum of Understanding. In the event of breach of any terms of the agreement it may be terminated without notice.

9.0 PARTNERSHIP AND JOINT VENTURE

This Memorandum of Understanding creates no legal partnership or joint venture, and none of the parties can commit the other financially, or otherwise, to third parties.

10.0 REVIEW AND EVALUATION

[Insert the timeline for review of the MoU and the frequency for review and/or evaluation of the partnership itself].

[List what aspects of the partnership will be reviewed and evaluated].

11.0 SIGNATURES

On behalf of [PartnerA]

Name

Signature

Witnessed by

Date

On behalf of [Partner B]

Name

Signature

Witnessed by

Date

Tool 5: Effective Communications

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

Where communication is concerned, you need to know:

- >> the environment in which you will be communicating (is it open and trusting? Is it cynical or hostile?);
- >> the audience(s) you are communicating to;
- >> the form of communication (medium) that best suits your audience(s); and
- >> the key messages you want to communicate or be in communication about.

The table below is partially completed to give you some ideas and prompt some thinking.

Audience	Internal/ External	Key message(s)	Medium	Frequency	Responsibility
Employees	Internal (accepting)	“Participating in the community builds loyalty”	Newsletters and Case Studies Staff meetings	Quarterly Fortnightly	Communications Manager
Our partner	External (cynical)	‘We know the value of partnering with the community. You should try it too’	Annual Report Annual Dinner – CEO Presentation	Yearly	CEO
Local community	External	“Our business is committed to our community”	Local newspaper Photos and campaign logo	Every six months	
Clients			Website		
Etc					

Tool 6: Evaluating the Partnership and its Program

Evaluating a partnership will tell you how the partnership is working and whether it is achieving its aims. A partnership evaluation should address the following questions:

1. Why did we decide to work as partners? Are the reasons still valid?
2. Did we achieve what we set out to do?
3. What else has happened as a result of our working together?
4. What have been the impacts on our organisations and our clients/community?
5. Were the achievements worth the expenditure of time, effort and other resources?
6. Do we need to still work together to achieve these outcomes?
7. What have we learnt?
8. What revisions need to be made to the partnership and how will we use the evaluation findings?

Evaluation Phases

Phase 1: Document the reasons and benefits of doing an evaluation

Potential reasons for evaluation:

- >> demonstrate the successes of your partnership and its program to your key stakeholders;
- >> raise your profile and generate community trust and interest in your organisation as a socially responsible business;
- >> support resource allocation decisions and/or leverage resources (e.g. help your community partner gain additional funding);
- >> support your partnership program's directions; and
- >> affirm that your partnership program was implemented as planned and achieved its aims.

Phase 2: Determine the questions you want to answer

The following are *examples* of questions that could be asked.

- >> How strong is the partnership?
 1. Does each partner believe that the partnership is working towards and achieving a common aim?
 2. Do both partners believe they are deriving benefits from the partnership?
 3. Does each partner understand its roles and responsibilities?
 4. Is there a fair division of responsibilities and resources? Is each partner meeting its roles and responsibilities?
 5. Are staff and managers from the partnering organisations working well together?
 6. Are decisions made jointly?
 7. Is there an environment of honesty, respect and mutual understanding?
 8. How do the partners communicate with one another? Is communication open, honest and regular?
 9. On what issues have the partners disagreed? Have mechanisms been put in place to resolve such issues?
 10. Has the partnership been recognised both internally and externally?

Tool 6: Evaluating the Partnership and its Program

>> What impacts has the partnership had on:

1. Each organisation's internal operations and organisational culture?
2. Each organisations clients/staff?
3. The wider community?

>> In what ways have these impacts benefited our organisation, staff, clients and communities?

>> What have been the costs and benefits associated with the partnership and its program?
Do the benefits outweigh the costs?

>> What are the main success factors of the partnership and its program?

>> What are the main strengths and weaknesses of the partnership and its program?
How can the partnership be improved?

Given the achievements, is it still viable to work together as partners?

1. Is the partnership needed?
2. Are there different or better ways (e.g. more cost effective ways) to achieve the same aims?
3. What measures would strengthen the partnership?

Phase 3: Write an evaluation plan

An evaluation plan identifies:

>> the person or persons responsible for undertaking the evaluation and/or for overseeing it;

>> the reports, documents and files that you will examine (e.g. MoU, media reports);

>> the viewpoints that will be gathered (e.g. managers, staff, clients, community members participating in your partnership program);

>> how the views will be gathered (e.g. through focus group meetings, personal interviews, written questionnaires or a combination of all three);

>> how the information will be assessed and reported upon;

>> what opportunities stakeholders will have to comment on the findings, conclusions and recommendations before a report is finalised;

>> when each of the evaluation activities will be completed and when the final report will be presented; and

>> who will have access to the findings and the final report (e.g. partners only, the wider community).

Tool 6: Evaluating the Partnership and its Program

Phase 4: Complete the evaluation activities

This involves the following stages:

Gathering Information

Some suggestions for collecting information include:

- >> meet with key stakeholders to review the evaluation questions and work plan;
- >> examine and write down the main points of the partnership documentation and files;
- >> develop a survey and distribute it to a sample of those that have been identified as key participants; and
- >> set up interview appointments with key participants, either in groups or individually and as appropriate.
Ask them the same set of questions.

If the partnership and its program involves only a handful of people, you can:

- >> run a workshop where all those involved can participate; and
- >> ask each partner organisation to answer the same set of questions separately (or in pairs) and then report back as a group.

Assessing Information

Analyse the documents and interview notes by identifying general themes concerns and issues raised by your participants. You can do this by preparing a table presenting the project's findings by evaluation questions.

Writing a Report

Prepare a report based on what you have learnt about the partnership and its achievements. Identify conclusions and a range of recommendations.

Make your report available to all relevant stakeholders.

Phase 5: Determine Next Steps

Revision of the partnership

Based on the evaluation findings determine if:

- >> the partnership needs a change of focus and/or a review of the aims and purpose of the partnership;
- >> roles and responsibilities need to be re-defined; and
- >> the partnership needs to be expanded or if others need to be involved (e.g. more staff).

Using the Evaluation

Based on your evaluation findings, determine what you will do with the report. Will you:

- >> Share it with partners and staff?
- >> Use it to adjust the partnership?
- >> Use it to plan further partnerships?
- >> Use it to finalise the partnership?
- >> Use it to apply for an Award?
- >> Use it to communicate the partnership and its activities?

Tool 7: Exiting Partnerships Painlessly

This tool outlines a checklist for exiting partnerships in a painless and honourable manner.

Activity Responsibility Completed		
Activity	Responsibility	Completion Date
Termination of partnership letter sent to partner		
Documentation of how assets (if any) are to be disposed of		
Preparation of a final report on the partnership (including any financial statements) Things to include in the report: when the partnership started; its aims and achievements the people that contributed to these achievements; and lessons learnt along the way.		
Final report shared with Boards, key stakeholders, staff and others as appropriate		
Documentation organised so the partnership's history is not lost		
Inform all stakeholders, including clients/community (if appropriate) of partnership termination		
Organise a celebration for partnership staff, managers and clients/community		