Building and Sustaining Effective Partnerships

A Guide for Practitioners

The Nature Conservancy
Protecting nature. Preserving life.
we all work with partners
we all are partners ourselves
we all have experience to share
we all have something to learn
What is a Partnership?

An ongoing working relationship where risks and benefits are shared.
What is a Partnership, in practice?

1. Joint creation of projects
2. Commitment of tangible resources
3. Mutual accountability
What gets in the way?
power imbalance
lack of transparency
each partner aiming to ‘win’ at any cost...
Why do all partnerships need these 3 core principles?

1. **EQUITY**
   - because it leads to **RESPECT** for the added value each party brings

2. **TRANSPARENCY**
   - because it leads to **TRUST** with partners more willing to innovate & take risks

3. **MUTUAL BENEFIT**
   - because it leads to **ENGAGEMENT** more likely to sustain & build relationship over time

Copyright: The Partnering Initiative
Exploring some further concepts

What difference does it make which organization or sector initiates a partnership?

What difference does it make if partnering is voluntary or a requirement?

What kind of time commitment do you think it takes to engage in partnership? Is it codified within your organization?
A Strategic Approach to Partnership

- PREPARE
- SELECT
- NEGOTIATE
- MANAGE
- MEASURE
- CONCLUDE OR ADAPT

Strategic Approach to Partnerships
Preparing to partner
To Partner or Not to Partner?

- New ideas
- Expanded scale
- Exchange technical expertise
- Provide, receive, or expand funding
- Share data
- Access to new constituents
- Leverage influence

- More time & cost upfront
- Increased coordination & communication needs
- Investment in maintenance
- Increased risks: unproductive relationships, partners not meeting goals/expectations, etc.
- Changing organizational visions and strategies
## Partnership Intensity

<table>
<thead>
<tr>
<th></th>
<th>Cooperation</th>
<th>Coordination</th>
<th>Collaboration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lower Intensity/informal</strong></td>
<td>Shorter-term, informal relationships</td>
<td>Longer-term effort around a project or task</td>
<td>More durable and pervasive relationships</td>
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<tr>
<td></td>
<td>Shared information only</td>
<td>Some planning and division of roles</td>
<td>New structure with commitment to common goals</td>
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<tr>
<td></td>
<td>Separate goals, resources, and structures</td>
<td>Some shared resources, rewards, and risks</td>
<td>All partners contribute resources and share rewards and leadership</td>
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<tr>
<td><strong>EX:</strong></td>
<td>Associations, networks</td>
<td><strong>EX:</strong> Coalitions, project teams</td>
<td><strong>EX:</strong> Joint ventures</td>
</tr>
</tbody>
</table>
The Art and Science of Partnering

- Insight / imagination
- Vision
- People skills, i.e. flexibility, humbleness
- Relationship building
- Personal engagement style

- Technical knowledge
- Negotiation, mediation, facilitation skills
- Critical analysis
- Evaluation
- Project Management
Selecting Partners
Partner Selection Process

1. Define Objectives
2. ID Key Criteria
3. ID Orgs and Gather Info
4. Narrow the List
5. Make a Decision
## Scoping Checklist

<table>
<thead>
<tr>
<th>Does the partner have...</th>
<th>Current status</th>
<th>Further actions</th>
</tr>
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<tbody>
<tr>
<td>A good track record?</td>
<td></td>
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<tr>
<td>Good standing in the field/sector?</td>
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<tr>
<td>Wide-ranging contacts and influence?</td>
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<tr>
<td>Skills and competencies that complement your org/other partners?</td>
<td></td>
<td></td>
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<tr>
<td>Sound management and governance structures?</td>
<td></td>
<td></td>
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<tr>
<td>Record of financial stability?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A stable staff group?</td>
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</table>
Negotiating Agreements
Spectrum of Partnership Documentation

Less Formal:
No documentation
Verbal Agreement

More Formal:
Memorandum of Agreement or Understanding

Most Formal:
Partnership Agreement
Joint Venture
Partnership Agreements

- Goals and expectations
- Roles and responsibilities
- Joint work plan
- Financing and resource contribution
- Fundraising
- Communications (including media)
- Decision-making structure
- Partnership review and measurement
- Long-term planning
- Exit strategy
Managing the Partnership
Quick Tips for Successful Collaboration

- Frequent communication, regular face-to-face meetings
- Take some field trips.
- Designate a coordinator or point person
- Get your boots muddy working on something tangible.
• Hire the right staff and clarify roles
• Joint work planning
• Manage conflicts and grievances
• Celebrate small successes
Measuring the Partnership
What to measure?

**Operations**
- Fulfillment of commitments
- Management
- External communications
- Transaction costs

**Set up**
- Governance structure
- Agreements
- Sufficient resources
- Clear roles
- Right partners?
- Clear review process

**Partner Relations**
- Internal communications
- Equity
- Transparency
- Institutional buy-in
Why measure a partnership?

• Predict early issues that could impact outcomes
• Potentially re-defining the partnership
• Keeping people motivated and on-task
• Changing activities & partners if required
Concluding or Adapting
Concluding/Adapting

• Tendency is to focus on the beginning, not the closure.
• Most partnerships aren’t designed or meant to last long term.
• All partnerships need to talk about the end at the beginning.
“At some point, the relationship will be so different from the one envisioned in this partnership, it will be time for this one to end. A successful exit to this partnership will be when Big Sur Land Trust is so fully competent that it has little to ask from TNC and TNC has little to offer, and when the conservation projects of mutual interest are completed.”

- Big Sur Land Trust – TNC Owner’s Manual
A Strategic Approach to Partnership

PREPARE

SELECT

NEGOTIATE

MANAGE

MEASURE

CONCLUDE OR ADAPT

Strategic Approach to Partnerships
<table>
<thead>
<tr>
<th>Example of poor partnering behavior</th>
<th>What does this convey to partners?</th>
<th>How to transform the situation with good communication?</th>
</tr>
</thead>
</table>
| Arriving late or ill-prepared for meetings | The meetings – and probably the partnership – are not important. | -ID a lead person from each org who can act as the point person  
-ask questions about their org’s priorities, and if they are changing  
-have a conversation about what could work better for them. |
| Making bilateral alignments/agreements with selected partners/individuals | If we agree, others will have to accept it (bullying). | -reflect on the potential negative impact on other partners, underscore need for transparency and involvement  
-clarify why the bilateral alignment has arisen, and explore how to share bilateral conversations with the group |
| Failing to complete agreed upon tasks within the timeframe, and giving no explanation | These tasks are not a priority, and the affects of me not doing them are someone else’s problem. | -revisit importance of the tasks, explore other ways of completing them. |
| One group acting on it’s own to report partnership results to public/external stakeholder | Limited loyalty to the partnership, my own objectives are more important. | -agree on a strategy and ground rules for public communication, logo use and other external communication.  
-discuss/recognize the importance of being accountable to the partnership. |
| Individual partners going to donors or board members with updates or resource requests, without the knowledge of others | We’re more interested in the success of our own organization than the groups. | -identify a lead person to represent the partnership in high level conversations  
-create an agreed upon strategy for engaging with donors |
Deepening partner engagement: Ideas to assist partners / partnerships in addressing issues creatively

- Create a glossary of the partnership’s language, definitions, meanings
- Create an opportunity (‘safe space’) to address power issues
- Introduce examples of good practice and good stories, tools, frameworks and examples of what is working, why and how
- Meet individually with partners
- Set up staff exchanges, field trips, exposure to each other’s issues / values / ways of working / achievements
- Create and capture expectations of each other (e.g. build a set of shared values that all partners will adhere to)
- Create ‘fit for purpose’ communications channels and management strategies
- Give recognition to ‘good behavior’ and achievements to reinforce the partnership and its goals
- Be the ‘champion’ of the vision and plans for the partnership – and keep reminding partners of both
- Help create a pathway for partners to engage
- Encourage partners to share leadership roles and encourage champions
- Remind partners of the value of their contributions and their benefits form the partnership
- Celebrate successes
- Encourage good record-keeping and ensure records are accessible
- Develop a risk management strategy
- Create monitoring and evaluation tools
Partnering works best when groups:

• Take time to build strong working relationships
• Develop genuine concern for each other’s underlying interests
• Do more listening than talking
• Develop good communication skills at all levels

• Deal with difficulties rather than ignoring them
• Balance a flexible with a rigorous approach
• Focus on practical and sustainable results
Special Considerations for Multi-Sector Partnerships

This and subsequent slides adapted from Partnership Brokering Association (PBA) training materials  http://www.partnershipbrokers.org/
Some sector stereotypes

<table>
<thead>
<tr>
<th>Public Sector</th>
<th>Corporate Sector</th>
<th>Non-profits</th>
<th>Aid Agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bureaucratic</td>
<td>Profit-driven</td>
<td>Self-righteous</td>
<td>Arrogant</td>
</tr>
<tr>
<td>Passing the buck</td>
<td>Hard-nosed</td>
<td>Narrow focus</td>
<td>Overpaid</td>
</tr>
<tr>
<td>Dogmatic</td>
<td>Greedy</td>
<td>Unrealistic</td>
<td>Wasteful</td>
</tr>
<tr>
<td>Focused on elections</td>
<td>Looking for the quick fix</td>
<td>Looking to score points</td>
<td>Following the “latest fad”</td>
</tr>
<tr>
<td>Inflexible</td>
<td>Self-centered</td>
<td>Unprofessional</td>
<td>Unfocused</td>
</tr>
<tr>
<td>Controlling</td>
<td>Inconsiderate</td>
<td>No accountability</td>
<td>Insensitive</td>
</tr>
</tbody>
</table>

If these stereotypes are true – why would anyone EVER want to partner?
## Public Sector Possible Drivers to Partner

<table>
<thead>
<tr>
<th>Benefits to Public Sector of Partnering</th>
<th>What Public Sector Partners can Contribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spreading risks</td>
<td>Act as coordinating mechanism</td>
</tr>
<tr>
<td>Establish a sustainable business model with multiple stakeholders</td>
<td>Bring legitimacy and credibility into the process</td>
</tr>
<tr>
<td>Skills to implement programs</td>
<td>Bring in decision-making (laws)</td>
</tr>
<tr>
<td>Show buy-in on products and programs</td>
<td>Resources (money)</td>
</tr>
</tbody>
</table>
## Corporate Sector
### Possible Drivers to Partner

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<tr>
<th>Benefits to Corporate Sector of Partnering</th>
<th>What Corporate Partners can Contribute</th>
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<tbody>
<tr>
<td>Expanding business models, new ways of doing business</td>
<td>Resources (money)</td>
</tr>
<tr>
<td>Employee engagement</td>
<td>Consumer awareness</td>
</tr>
<tr>
<td>Improve their reputation</td>
<td>Marketing opportunities</td>
</tr>
<tr>
<td>Decrease instability/insecurity of business environment</td>
<td>Distribution channels</td>
</tr>
<tr>
<td>Potential new customers, opening up new markets</td>
<td>Business principles, discipline, metrics</td>
</tr>
</tbody>
</table>

- Expertise, knowledge, know-how
## Non-profit Sector Possible Drivers to Partner

<table>
<thead>
<tr>
<th>Benefits to Non-profit Sector of Partnering</th>
<th>What Non-profit Partners can Contribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leverage resources</td>
<td>Social license to operate</td>
</tr>
<tr>
<td>Exert influence, have a “say” (advocacy)</td>
<td>Contribute to social-economic processes</td>
</tr>
<tr>
<td>Create opportunities for new programs</td>
<td>(Human) resources, expertise, local and contextual knowledge</td>
</tr>
<tr>
<td>Build capacity, exchange knowledge</td>
<td>Societal enlightenment</td>
</tr>
<tr>
<td>Long-term relationships, commitments</td>
<td>Social accountability (help businesses achieve their triple bottom line)</td>
</tr>
<tr>
<td>Opportunities for scaling up</td>
<td>Expertise, knowledge, know-how</td>
</tr>
<tr>
<td>Shift from short term to more strategic partnerships</td>
<td></td>
</tr>
<tr>
<td>New ways of working/experimentation</td>
<td></td>
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</tbody>
</table>
## International Agencies Possible Drivers to Partner

<table>
<thead>
<tr>
<th>Benefits to International Agencies of Partnering</th>
<th>What International Agency Partners can Contribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficiency, save resources</td>
<td>Reach, influence with (international) governments and communities</td>
</tr>
<tr>
<td>Fill gaps in implementation capacity, expertise, geography</td>
<td>Resources (various)</td>
</tr>
<tr>
<td>New ways of working, new ideas</td>
<td>Research</td>
</tr>
<tr>
<td>Build capacity, exchange knowledge</td>
<td>Experience, stability (most international agencies have been “around the block”)</td>
</tr>
<tr>
<td>Increased visibility</td>
<td>Footprint (influence, presence in other continents, global level)</td>
</tr>
<tr>
<td>Access to different types of resources</td>
<td>Act as initiator and convening body</td>
</tr>
<tr>
<td>Scale up</td>
<td></td>
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</tbody>
</table>
Drivers to Partner
that can apply to ALL sectors

- Access to more **resources** (expertise, knowledge, skills, networks, and money)
- To have great **reach/scale/impact**
- Aspiration to have greater **legitimacy**
- (re) building **reputation**
- **Economic sustainability** for social causes
- Increasing expectations of **transparency** and **accountability**
Experience suggests that partnerships work well when...

... each sector plays its appropriate part and contributes from core competencies and strengths
Resources

TNC’s Conservation Partnership Center
www.conservationpartnerships.org

World Wildlife Fund – UK Partnership Toolkit

The Partnering Initiative
www.partneringinitiative.org

The Fieldstone Alliance
www.fieldstonealliance.org

Partnership Brokers Association
www.partnershipbrokers.org