

# Partnership Development Part 1 and 2

CASAS National Summer Institute 2009

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# Session Objectives

- ▶ Explore how to build effective public/private partnerships
- ▶ Learn tips on developing partnerships and/or improving your current partnerships
- ▶ Develop skills for partnership development.

# Partnership Development

- ▶ Successful partnership takes time to achieve, and can be difficult.
- ▶ How do you know if it is worth it?
  - Assessing benefits
  - Assessing risks

# Partnership Defined

- ▶ A partnership is a voluntary and collaborative joining of two or more entities; it can include entire organizations or be focused on single-function groups. The organizational form requires that all participants work together to achieve a common purpose or task. In working together, partners will, to varying degrees, share risks, responsibilities, resources and competencies. The relationship's underlying purpose is to extend resources, improve work throughput or grow some aspect of each partner to its benefit.
- ▶ Partnering is characterized by mutual cooperation and responsibility; the purpose is to achieve a pre-specified goal. Good partnerships have a clearly defined expectation for outcomes of the relationship and an understanding of the processes and work that will be required to achieve its goals; these need to be in place before work begins.

# Partnership Defined

- ▶ Partnership
- ▶ Strategic Alliance
- ▶ Collaboration

# Partnerships: Four Keys



# For Partnerships to Work

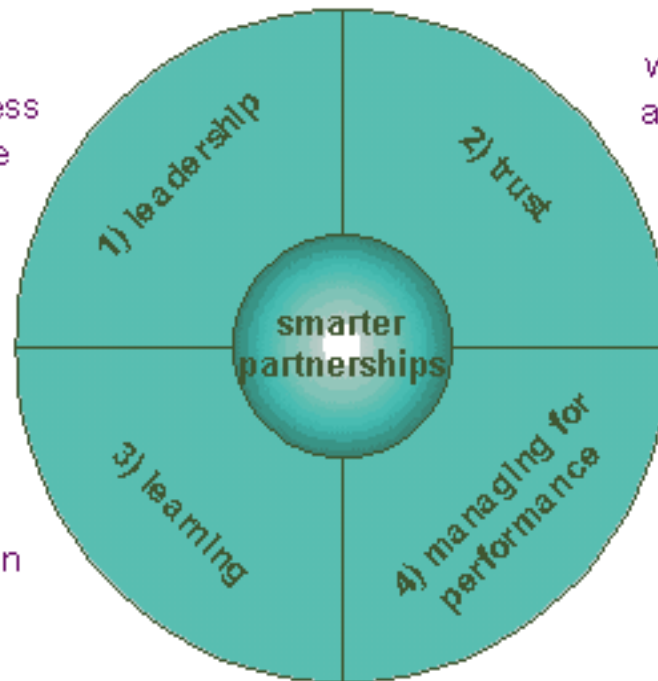
► There must be:

- Leadership
- Trust
- Learning
- Performance

# Four Keys for Partnerships that Work

**1) Leadership**  
where partners share a common vision and harness their energies to achieve more than they could on their own

**3) Learning**  
where partners continuously seek to improve what they do in partnership



**2) Trust**  
where partners are mutually accountable, share risks and rewards fairly, and support each other

**4) Managing for performance**  
where partners put in place necessary practices and resources, and manage change effectively



# Partnership Success Factors

- ▶ 1. Focus on Important Needs
- ▶ 2. Make the Partnership a Win–Win
- ▶ 3. Adopt a Shared Vision
- ▶ 4. Negotiate a Formal Agreement
- ▶ 5. Ensure Good Communication
- ▶ 6. Ensure the Partnership is Owned by the Whole Organization
- ▶ 7. Maintain an Environment of Trust

- ▶ 8. Leave Your Ego and Control at the Door
- ▶ 9. Understand Each Partner's Mission and Organizational Culture
- ▶ 10. Use the Strengths of Each Partner
- ▶ 11. Find Ways Through the Red Tape
- ▶ 12. Build Step by Step
- ▶ 13. Strive for Excellence
- ▶ 14. Diversify Your Funding Sources
- ▶ 15. Constantly Seek Out and Adopt Best Practices

- ▶ 16. Always be Courteous and Diplomatic
- ▶ 17. Honor Your Commitments
- ▶ 18. Celebrate Success
- ▶ 19. Respect the Right to Disagree; Act on a Consensus Basis
- ▶ 20. Network and Build Relationships
- ▶ 21. Put Mechanisms in Place to Re-Enforce the Partnership

# Self Assessment

- ▶ Does the agency have needs that can be best met through partnering?
- ▶ Does the agency have assets that can be leveraged to make it a desirable partner?
- ▶ Is the environment right for the agency to seek a partner?

# Leadership: Benefits of Partnerships

- ▶ Concentrate on the "added value" that partnership working can bring. Partnerships sometimes falter for lack of a clear focus on this – the benefits that partners can achieve that they cannot by acting on their own.
  - Greater Impact
  - New and Better Ways
  - Spread Risks
  - Reduce/Share Costs
  - More Resources

# Risks

For example:

- ▶ Risks associated with making the right decisions about the value of the partnership; some situations end up not being right for a joint effort.
- ▶ Risks can be tied to partner sophistication regarding the process itself; some groups lack experience in partnering and are unprepared to carry their weight this will require others to absorb more than was originally envisioned.
- ▶ When risks are not pre-identified and mitigated, the partnership is less likely to achieve pre-defined outcomes. The outfall of a negative relationship can include damaged relationships and networks, unflattering publicity and lost resources (time, money, etc.).

# Risks

Examples of specific risk factors include:

- ▶ Entered into the relationship for the wrong reasons
- ▶ Unprepared to engage in the give-and-take of working together
- ▶ Didn't provide sufficient structural support for the selected organizational form
- ▶ Poorly designed and implemented processes – within the existing partner organizations or in those designed specifically to accommodate the new relationship
- ▶ Lacked guidance of a knowledgeable facilitator (either internal or external)

# Developing Partnership Agreements

- ▶ In developing new partnerships – and in taking stock of existing partnerships – it is helpful to think through the main elements which you need to get right. Documenting your agreement on what you intend to achieve, how you are going to manage and resource the partnership, and how you are going to deal with potential conflicts within the partnership, etc can help consolidate the partnership.



# Leadership

- ▶ Think about where your partnership (or partnerships) sits on the range below. More than one type may be present across an established partnership.

# Degrees of Partnering

- ▶ How are partnership objectives best served by the different degrees of partnership?
- ▶ In what areas do you need to concentrate on, say, Co-ordination, and where do you need to move to Collaboration or Co-ownership?

# Where are your current partnerships?

Co-existence	"You stay on your turf and I'll stay on mine."
Co-operation	"I'll lend you a hand when my work is done."
Co-ordination	"We need to adjust what we do to avoid overlap and confusion."
Collaboration	"Let's work on this together."
Co-ownership	"We feel totally responsible."

# Degrees

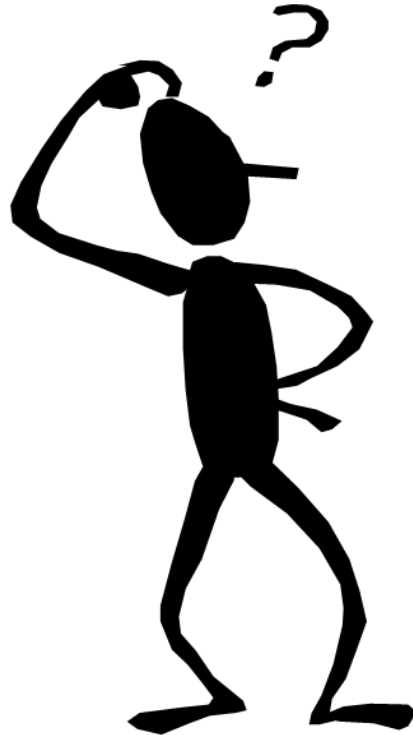
- ▶ **Co-existence** may be a rational solution – where clarity is brought to who does what and with whom.
- ▶ **Co-operation** is often a pre-requisite of further degrees of partnership, where there is early recognition of mutual benefits and opportunities to work together.
- ▶ **Co-ordination** is where the parties accept the need to make some changes to improve services/ activities from a user/ customer/ community perspective and make better use of their own resources.
- ▶ **Collaboration** is where the parties agree to work together on strategies or projects, where each contributes to achieve a shared goal.
- ▶ **Co-ownership** is where the parties commit themselves wholly to achieving a common vision, making significant changes in what they do and how they do it.

# Building Trust: What Makes a Good Partner?

*Someone who:*

- ▶ wants the partnership to succeed
- ▶ seeks win-win solutions
- ▶ is open and clear about their own goals
- ▶ listens well and responds to other views
- ▶ is prepared to trust
- ▶ has integrity and acts consistently
- ▶ effectively carries out their tasks and responsibilities
- ▶ respects others and their contributions
- ▶ is not prepared to sweep difficulties under the carpet
- ▶ can be flexible but retains focus
- ▶ understands how partners depend on one another
- ▶ leads their colleagues in support of collaboration

**Are you a good partner? Examine  
yourself against the criteria on  
slide 20**



# Finding the Right Partner

Assess for:

- ▶ The reputation of a potential partner
- ▶ Enthusiasm quotient
- ▶ Passion around vision/needs
- ▶ Ability to complement
- ▶ Accessibility to talent
- ▶ Past experience with partnering

# Establish Ground Rules

- ▶ Setting ground rules in partnership can make a great difference in helping to build robust relationships and smooth partnership working. Ground rules can be built into partnership agreements as guiding principles, while mutually agreed rules for meetings can help ensure productive outcomes.



# Ground Rules: Governance

- ▶ focus on partnership added value – the difference that the partnership should make, to the benefit of the area/ customers/ beneficiaries
- ▶ spring no surprises
- ▶ deal promptly and constructively with issues needing resolution
- ▶ support each other
- ▶ adhere to decisions agreed by the partnership
- ▶ communicate effectively – being open, sharing information and knowledge
- ▶ learn continually – building common knowledge, understanding and skills to improve effectiveness

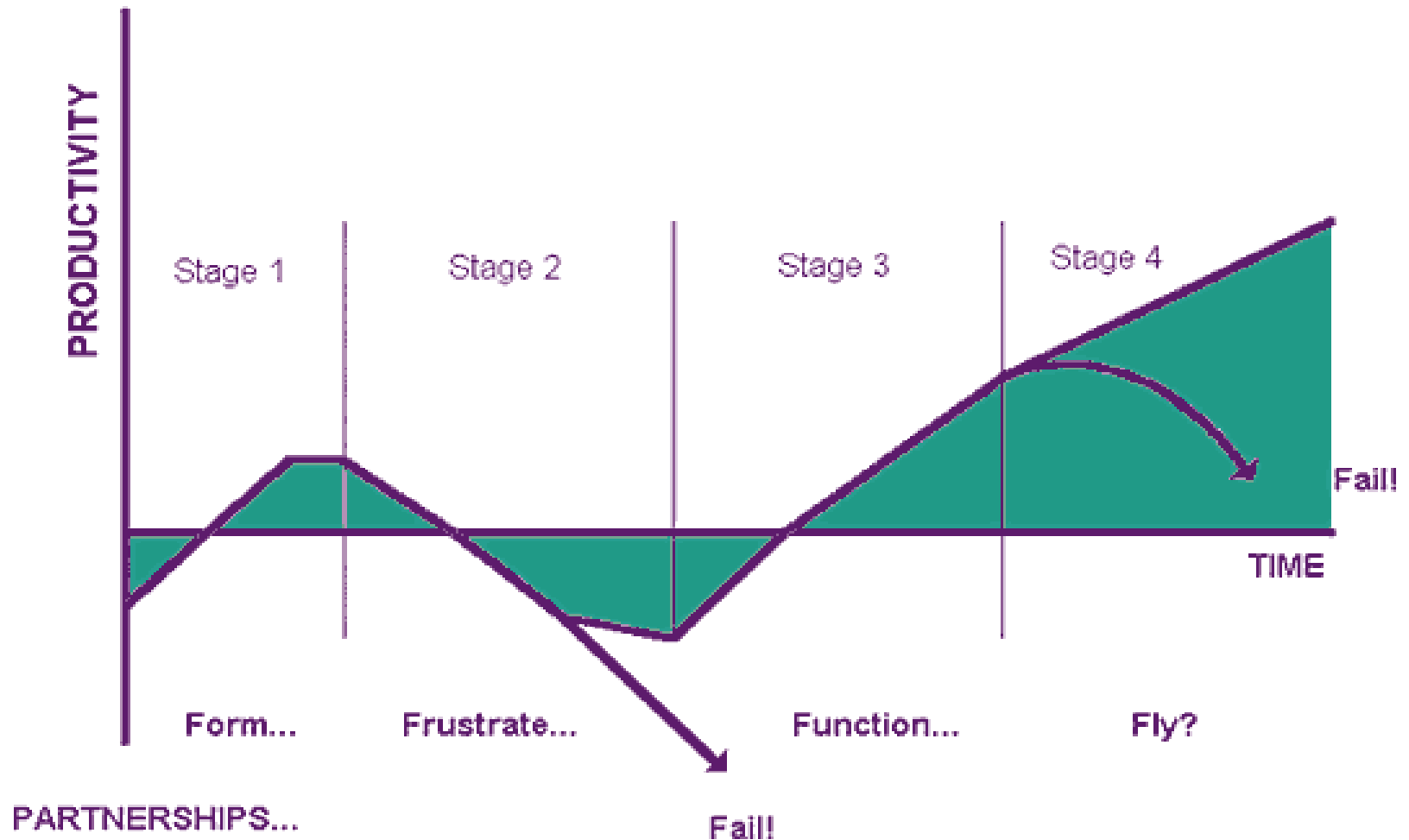
# Productive Meetings That Build Trust

- ▶ avoid use of jargon and abbreviations
- ▶ take time to explain concepts
- ▶ don't hesitate to ask questions
- ▶ don't make assumptions about others (their positions, understanding, etc)
- ▶ respect the contributions of others
  - listen
  - don't interrupt
  - no side chats
  - don't jump to criticize, or dismiss innovative ideas
- ▶ be open to challenge and being influenced
- ▶ be constructive at all times
- ▶ be willing to accept and give feedback
- ▶ keep to time
- ▶ all mobile phones off

# Learning

- ▶ It is helpful to think of partnerships going through a series of stages, during which particular tactics are most appropriate to ensuring partnership progress and success. These are similar to the stages that any team is likely to go through, as people come together to achieve common goals.

# The Partnership Life Cycle



# Ending Partnerships

- ▶ Ending partnerships is a change issue, and the approach to managing the change depends on what you want to achieve.
  - is the partnership's task completed, or have you – and your partners – concluded that it needs to be tackled in some other way?

# Managing for Performance

## ▶ Partners Responsibilities

- Clarifying roles and responsibilities
- Applying Management Standards
- Clarify Means and Ends

# Roles for Metrics:

Evaluation and metrics are powerful tools that can guide future partnerships as well as the current one. Some of the roles the measurement process has fulfilled for others making them feel they are fully utilizing their metrics include:

- Providing data to identify strengths to capitalize upon.
- Establishing an environment in which partners can openly discuss mistakes and how to avoid future problems.
- Providing factual data that can be discussed more neutrally and openly.
- Serving as a teaching tool to assess what you have learned -- about your partners, the particulars of the partnership, generic lessons that you can expect to see again in the future.

# Typical Partnership Structures

- ▶ Based on knowing your motivation for forming a partnership, consider which of the described structure types would best serve your needs.
  - Short-term (temporary) partnerships
  - Informal voluntary partnerships
  - Formal voluntary partnerships
  - Statutory partnerships –
  - Strategic partnerships or joint ventures

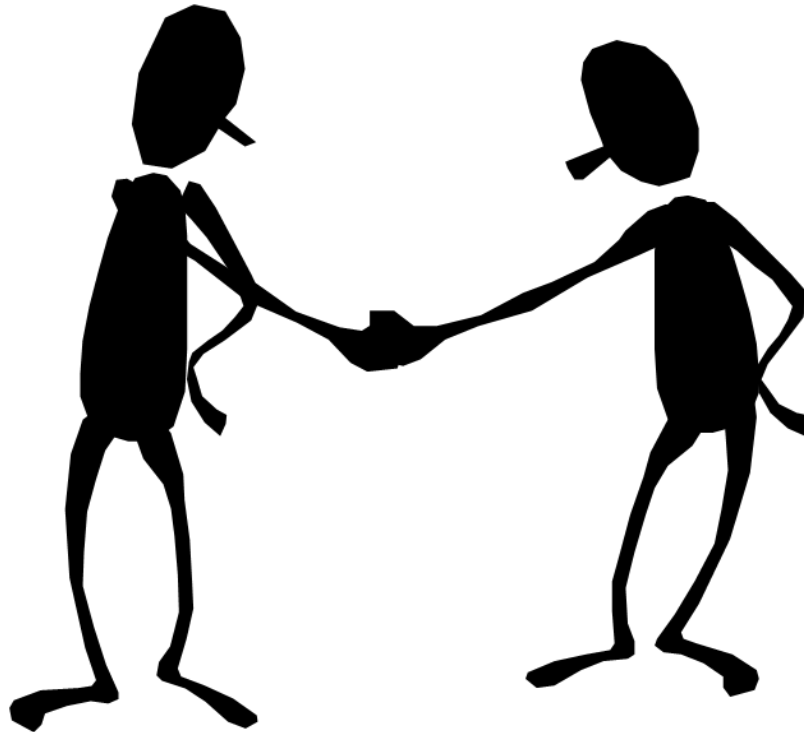


# CHALLENGES OF PARTNERSHIPS

## ► List Your Challenges

Your Partnership Challenge	Potential Solutions

# When it works.....



# Go To

- ▶ <http://strumpfassociates.com/>
  - AND CLICK ON OUR PRODUCTS
- ▶ To find:
- ▶ **Partnerships in Today's Environment: A self paced learning and quick reference guide**
  - By Joan Klubnick and Lori Strumpf

# ABOUT LORI

Lori Strumpf has over twenty-eight years in the field of organizational development and change management in human services and workforce development organizations. Lori has been in business as ***Strumpf Associates: Center for Strategic Change*** for the last 28 years. She is a nationally known expert in organizational management, training and design for education, training, and human resource development systems. Prior to starting her business, Lori was the Assistant Director for the National Association of Private Industry Councils. She is on the board of the National Youth Employment Coalition and was a founding member. She has been a Senior Associate at Brandeis University, Center for Human Resources, Heller School for Public Policy. Prior to moving to Washington, D.C. to work on the Vice President's Task Force for Youth Employment, Lori was the Assistant Director to a project for court diverted delinquent youth. She also worked at Florida State Prison, counseling prisoners.

Strumpf Associates is a small cadre of training and consulting experts, headquartered in Washington, DC. The Principals in Strumpf Associates have decades of experience helping organizations manage change, build systems, build leadership teams, and improve program quality and customer satisfaction. The Center provides organizational change management consulting and executive coaching to schools, workforce organizations, and welfare organizations.

Over the last several years, Lori has helped design and implement over 250 one-stop career development centers. Currently, she works on behalf of the business community in partnership with local elected officials in eight communities around the country to assist in developing a strategic approach to workforce development. Lori Strumpf has a Masters and Specialist Degree in Educational Counseling from the University of Florida.

### **Our Mission...**

Managing change. Building systems. Improving quality.  
Helping organizations re-think their business and refine their services

### **Our Vision...**

We excel at partnership with our customers to invest our resources, skills, ingenuity, and dedication to create positive change. We seek to do all we can to inspire others to join us and make a difference within their communities.

**Strumpf Associates: *Center for Strategic Change*** helps human resource organizations improve the quality of their delivery systems and services by ensuring the connection to workplace skills. We provide technical assistance, leadership training, partnership facilitation, creative problem solving and practical research - all designed to improve customer satisfaction.

## **Who We Are...**

Strumpf Associates is a small cadre of training and consulting experts. We are headquartered in Washington, DC. The president and founder, Lori Strumpf, is a nationally known expert in training and design for education, training, and human resource development systems. She has written numerous publications, including a four-book series and teachers guide on Essential Skills for the Workplace: Building Workplace Competencies, published by Contemporary Books. She has also developed a Functional Context Instruction ToolKit, an interactive teaching and reference tool, available on CD-ROM.

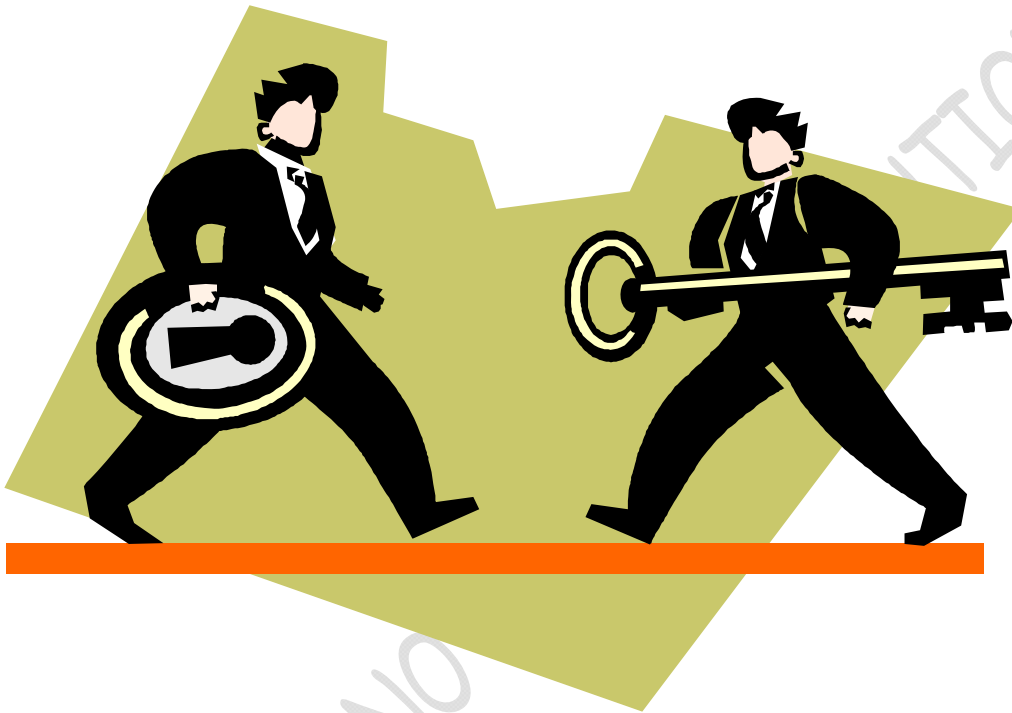
Principals in Strumpf Associates have decades of experience helping organizations manage change, build systems, build leadership teams, and improve program quality and customer satisfaction.

## **How To Learn More...**

For more information about Strumpf Associates: Center for Strategic Change, please call.  
Telephone: 202.872.0776 Fax: 202.872.0377 or at [strumpfctr@aol.com](mailto:strumpfctr@aol.com)

# PARTNERSHIPS IN TODAY'S ENVIRONMENT

-- A form of *working together*



From simple agreement to complex contract, partnerships can promote organizational effectiveness

**Self-paced learning and quick reference guide**

Joan Klubnik, Ed.D.  
Two-K Consulting

Developed by

Lori Strumpf  
Strumpf Associates

2009

# PARTNERSHIPS IN TODAY'S ENVIRONMENT -- A form of *working together*

## SELECTING PARTNERS

### SELF TESTS

#### Overview

Partnerships are a form of team work. They have been around since ancient times and have been studied extensively. As a consequence, there are well-accepted characteristics of successful partnerships and of the individuals who populate them. Below are some self-tests based on traits that are repeatedly mentioned as ones that increase the likelihood of partnership success - for the agency and for the people.

Self-tests are useful tools for leaders, individuals, teams and agencies to use as they move to partnering. They can be used to determine how you and your potential partner rate compared to *partnership success characteristics*. Tests help identify strengths and weaknesses and the gaps that need to be discussed. The two partnering characteristics quizzes below can help your agency assess readiness for moving forward. At minimum you need to ask yourself:

1. What are key traits of a *good* partner at the interpersonal and/or organizational level - how do we measure up?
2. How equipped (at a personal and agency level) are we to begin the partnering process?
3. What barriers (organizational and individual) might arise as we move along the partnering path?

**The tests are a team tool** - have everyone complete the ones your agency chooses to use and then discuss results; look for gaps, areas to capitalize upon or ones to strengthen.

#### Test I -- Individual Partner Quiz



#### Directions:

Below are ten critical qualities found in individuals who are successful in partnering relationships. Take the quiz to determine the kind of partner **you** might be. Have each person who will be actively involved in the partnership complete the quiz. At the backend, spend some time sharing results. Look for areas of strength and weakness within the working relationship.

1. Rate each quality below on a 1 to 6 scale, 6 high.



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- For this exercise to have the greatest value to future partnering, you **MUST** discuss the items with your internal staff and partner (at minimum this can be at a summary level).

### INDIVIDUAL PARTNER QUIZ

Your Ratings 6=high						Individual Partner Quality
1	2	3	4	5	6	
						1. <b>Possesses self-confidence.</b> You know the capabilities, skills and instincts you bring to the table. Your gauge of work quality and appropriateness of action is within yourself; you pursue what you know is correct (even if other don't agree). You trust yourself to know when partnering is, or is not, the best choice.
						2. <b>Wants to succeed.</b> Effective partners are competitive and willing to pursue partnership goals. You have a desire to win, to stay ahead of competitors; you want the partnership to be all it can be. This trait builds relationship synergies. You will partner because you recognize the benefits of shared interests and resources.
						3. <b>Is an effective communicator.</b> You practice effective communication skills including active listening. You work to build open, honest and on-going communication among partners.
						4. <b>Manages feedback.</b> To grow in a partnership, one must be willing to share observations (feedback to a partner; you listening to input). You are open to ideas from others. You make use of structured feedback mechanisms.
						5. <b>Understands the partner's business.</b> You take the time to learn about what your partner considers valuable and of benefit to them and their organization; you do research and talk with people.
						6. <b>Is flexible and a risk-taker.</b> You are willing to change, to go with your hunches; you have enough confidence in yourself and the team to take calculated risks to achieve objectives.
						7. <b>Demonstrates integrity and trust.</b> You respect yourself and those with whom you work; you are ethical in your dealings (business and personal). You have a strong personal work ethic and apply <i>solid</i> business practices; because of your behavior, you are respected by peers and partners.
						8. <b>Builds upon interpersonal associations.</b> You know that relationships underlie all business dealings. You pay attention to dissimilarities and commonalities among you and your partners; you use the information to <i>grow</i> the partnership. You are skilled in identifying core problems and reaching <i>win-win</i> solutions. You understand that <i>win-lose</i> is always <i>lose-lose</i> ; you dislike settling for a <i>zero-sum game</i> .
						9. <b>Recognizes the importance of chemistry.</b> You work to achieve positive group dynamics; you recognize the importance of the <i>human element</i> to

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Your Ratings 6=high						Individual Partner Quality
1	2	3	4	5	6	
						effectively managing daily partnership challenges.
						10. <b>Is sensitive to work-life balance.</b> You know when to work hard and when its time to take a step back from the work-mode to spend time in life's other arenas (family, social, personal, etc.). You recognize the need for relaxation to restore the body and mind so you can better meet the stress of daily business - for you and your partners.
						= <b>TOTALS - individual columns and sum</b>

### Test II - Assessing Partnership Health



Once you've looked at the characteristics of individuals involved in the partnership and are satisfied with the results, turn your attention to identifying characteristics associated with an effective partnership at an organizational level. How healthy and capable is your organization and those you are considering as partners?

Each of the items below describes a characteristic generally found in healthy partner organizations. As you review the items, think in terms of *the total organization* and its efforts (don't focus on individual contributors). Enter your answers on the scale. You can assess the health of each partner organization separately and/or as a totality. The real value of the process is the open discussion of what it takes to improve the odds for partnership success.

### Directions for the test

1. Decide at what level you will be assessing; place a check next to the level you have decided upon. (You can assess individually first and then at the group level.)
2. Read through each item and place an *X* in the box that most closely reflects performance for the overall group.

This is an assessment of:

\_\_\_\_ My organization

\_\_\_\_ My partner organization (at this level you are assessing each other

\_\_\_\_ The partnership as a whole (this is joint processing)

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### CHARACTERISTICS OF A HEALTHY PARTNERSHIP QUIZ

	Organizationally demonstrated characteristics found in healthy partnerships	Never	Some-times	Often	Always
1.	<b>Continually do their best</b> on the partnership's behalf. Members keep the mission in the forefront. The focus often centers on addressing unmet customer needs and improving service delivery.				
2.	<b>Explicit goals</b> clearly tied to a shared vision; these concretely describe and communicate what is to be achieved jointly and by individual partners.				
3.	<b>Clear, measurable objectives</b> that support strategic plans; they include measures of achievement and accountability.				
4.	Partners <b>know their strengths</b> and proactively work to strengthen and develop expertise in current environments; they seek ways to apply them in new, untested arenas.				
5.	Partners <b>employ metrics and success stories</b> to articulate results and strengthen the engagement; these are reported individually and/or jointly.				
6.	Partners verbally and behaviorally commit <b>to common interests</b> ; these supplant individual partner interests.				
7.	Leaders view the <b>work of the partnership</b> as integral to their everyday activities - goals and needs are melded into daily effort.				
8.	Partners share <b>strategic direction and values</b> ; the relationship is more than <i>looking for financial benefits</i> ; all parties use a <i>we voice and mentality</i> in all partnership-related matters.				
9.	Partners see <b>accountability</b> for tasks and outcomes as a joint responsibility of the combined partnership; there is no finger-pointing, especially when things aren't working well.				
10.	Each partner <b>feels commitment and ownership</b> ; sub-groups share responsibilities and rewards based on how the partnership performs; commitment is found at multiple levels.				
11.	Partners work to establish <b>strong personal relationships</b> ; they develop and uphold trust at all levels; they are willing to invest in each other to achieve this.				
12.	<b>Leaders accept their role</b> in building enthusiasm for the relationship with all stakeholders; they broadly engage staff in communications and decision-making; they lead by example.				
13.	Partners have <b>substantive roles</b> - these enable all parties to feel ownership of the group's processes, services and				

## PARTNERSHIPS IN TODAY'S ENVIRONMENT -- A form of *working together*

	Organizationally demonstrated characteristics found in healthy partnerships	Never	Some-times	Often	Always
	products.				
14.	Partners are <b>prepared for the changes</b> resulting from establishing a functioning partnership; they are skilled in change management.				
15.	Partners focus on establishing <b>quality communication</b> (internal and external); they incorporate a strategic plan, multiple channels, inclusion and accommodation of differences; they apply the principles of open, active communication.				
16.	All members are <b>engaged in relationship building</b> from idea creation through delivery; the goal is agreement on the purpose/need of and commitment to the relationship; they use structure to ensure that this happens; commitment is an investment.				
17.	Partners <b>operate within a structured and coordinated environment</b> ; they rely on skilled leaders who apply standards for operations, conflict resolution, recruitment, financial management; there is effective measurement/evaluation of programs				
18.	There is <b>dedicated staff time</b> - planning for day-to-day staff time and for use of organizational resources enables partnership goals to be accomplished; work <i>schedules</i> include sufficient to the effort.				
19.	Partners are <b>focused on execution</b> ; they recognize the importance of effective processes and operational efficiencies to improved performance and quality service/product delivery.				
20.	<b>Sustainability</b> is considered vital and there is pre-planning; partners know that a major change (loss of a key staff) can lead to social network collapse, loss of member stability and operational crises; they on-board staff and prepare new people to step in and provide seamless leadership if a key leader leaves.				
	<b>SUB-TOTALS by column</b>				
	<b>TOTALS</b>				