# Partnership Essentials

**By Health Nexus**

Adapted from original resources developed by Health Nexus for HC Link (2017).
Revised 2018

health nexus santé

***Healthy people, thriving communities***
***Des gens en santé, des communautés florissantes***

# Contents

What is a partnership? 03
Preparing for partnership 04
- A reflective process 04
- An equity and inclusion lens 05
- The "right" amount of documentation 06
Six activities for successful partnerships 07
1. Connect 07
2. Foster shared understanding 08
3. Create a shared vision 09
4. Plan collaboratively 09
5. Work together for change 10
6. Celebrate, evaluate and renew 11
Parting words 12
Tools for Developing Effective Partnerships 12
References 13

## Introduction

Working in partnership is a reality for many non-profit groups and organizations. Partnerships allow members to benefit from a rich diversity of experience, skills and positioning when tackling complex and systemic issues.

You may be familiar with using partnership approaches as a small group with few human and financial resources, or as an organization spread throughout a large geographic region. You may be newly using partnership as a means to connect with broader stakeholders and to co-lead with more diverse voices. Whatever your motivation, working in partnership can enhance your ability to implement multifaceted strategies to achieve your objectives.

This resource explores definitions of partnership and considers different approaches to working in partnership. It provides considerations for how to approach partnership work and details six key activities for dynamic and effective partnerships.

# What is a partnership?

The essential nature of each partnership is defined by those who participate in it[1]. A common theme in many partnership definitions is "organizations/ agencies coming together to work towards a shared goal or vision"[2].

Partnerships involve relationships between more than one person, group or organization. Often, each partner has different objectives, activities, resources and expectations about working in partnership[3].

The level of engagement between members also defines partnerships. Himmelman's Collaborative Continuum[4] (Figure 1) illustrates common levels of partnership, from networking to coordination to cooperation and, finally, to collaboration.

Partners in different sectors may use slightly different words to describe working together. What is most important is that your partners develop a shared understanding of your partnerships' objectives and principles for working together.

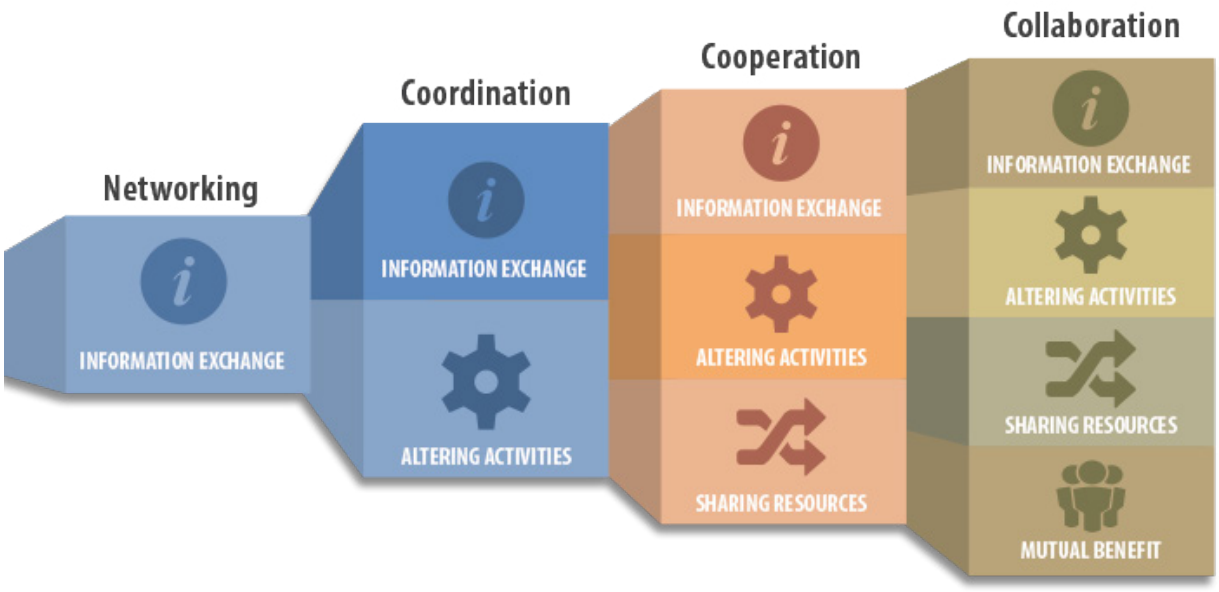



*Figure 1: Himmelman's Collaborative Continuum (Source: Toolkit2Collaborate.ca)*

# Preparing for partnership

Building and sustaining an effective and equitable partnership is an ongoing and often non-linear process. When preparing your work in partnership - and to enhance it, on a continual basis - Health Nexus recommends you cultivate the following qualities:

## A reflective process

A reflective process conducted as early as possible, and throughout the life of your partnership, will help you develop a clearer picture of what you want to achieve through partnership, as well as your ability to work in the partnership. Reflection is relevant whether or not you have already identified partners, and whether your partnership is by choice or by direction (such as a funder's requirement).

Use these questions to guide your reflective process:

- What do we want to accomplish that is better done in partnership?
- How would we like to work in partnership?
- What are the advantages for us when we work in partnership?
- What dilemmas can arise when we work in partnership?
- What can we offer to a partnership? What are our strengths?
- What do we need and expect from our partners?

This reflective process will help guide your partnership work with clearer insight and intention. It can also prepare you to develop more transparent relationships with both new and existing partners.

# An equity and inclusion lens

*When we collaborate with diverse partners, inequity is not just an issue outside in the community; power dynamics can also exist between partnership members (and within member organizations).*

*Applying an equity and inclusion lens involves recognizing the varying levels of power, and related resources, that different members hold within our partnerships. It's about developing anti-oppressive strategies and changing practices, to address imbalances. It is a commitment to ongoing dialogue, reflection and action to make sure that equity-seeking (marginalized) individuals and groups are intentionally centered within collaborative leadership and decision-making.*

- Website of the Collaborative Leadership in Practice (CLiP) project[5]

To facilitate discussing equity issues and practices within partnerships, the CLiP project published a one page document Principles of Collaborative Leadership Towards Equity[6]. From Ottawa, a partner network of the CLiP project, the City for All Women Initiative, publishes an accessible Equity and Inclusion Lens Handbook[7] for community agencies – and a parallel handbook for municipalities[8].

Even as we shift practices and favour equity inside our partnerships, partnership members who represent equity-seeking (marginalized) communities often remain structurally and financially under-resourced for their roles within the partnership. The pressure of being over-solicited to participate in partnerships contributes to this situation.

More-resourced partnership members who respect the difficult realities of their lessor-resourced members, and who actively pursue finances to balance them, are engaging meaningfully, not tokenizing, and promoting equity.

A partnership committed to an equity and inclusion lens should respect each member's decisions about which partnership requests to pursue, and their level of participation. It is likely that levels of participation may need to fluctuate over time.

If you represent an equity-seeking group or community, be mindful of over-commitment and burnout. Honoring self-care and resilience are also anti-oppressive practices.

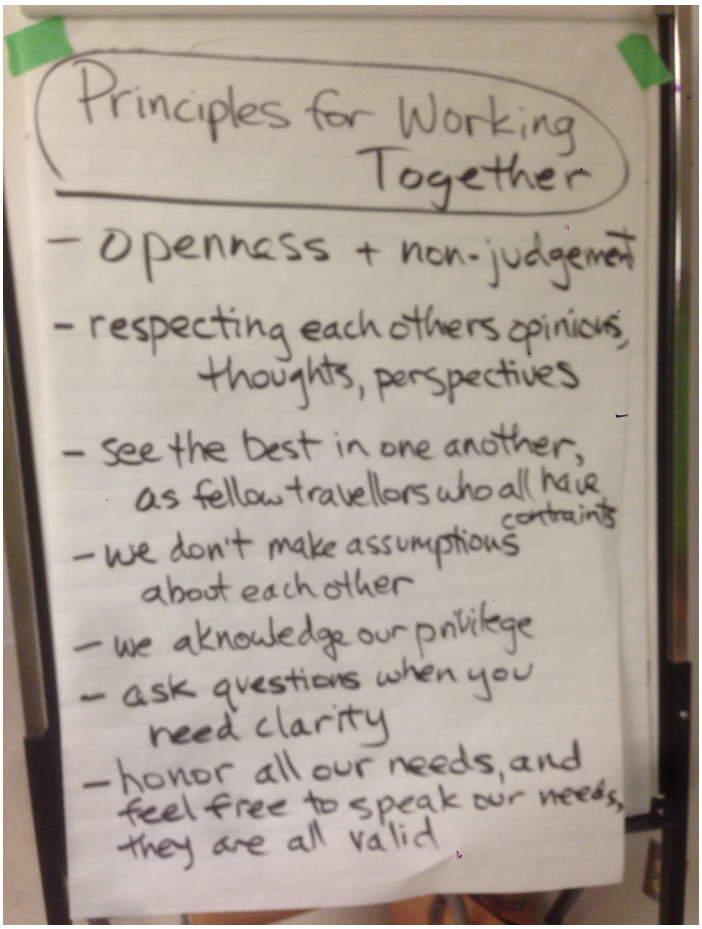
## The "right" amount of documentation

Every partnership needs to find a happy balance between spending time in dialogue and action, and time spent editing documents.

For example: when clarifying a partnership agreement on your values, objectives and principles for working together, will it be adequate to circulate notes from your discussions, or do you need a multi-sectioned document? This is a collective decision your partnership needs to make. Here is another example of a decision: how often will members review, and update, partnership documents?

When funds are involved, it is important to have a signed partnership agreement to ensure a legal framework for responsibilities and activities. Whether a document is signed or not, the clarification and shared understanding built through developing joint documentation helps align partnership members.

Over the lifespan of a partnership, reflection and evaluation activities can be guided by your documentation, which can include vision statements, principles of working together, publicity flyers, workplans and notes on lessons learned.



# Six activities for successful partnerships

Dynamic and effective community partnerships practice these six activities[9], each partnership in its own unique way. Whether you are forming a new partnership or maintaining an existing one, these activities are equally relevant. They do not typically happen in a neat, distinct order; the activities will – and should – happen regularly, in synergistic ways, with varying emphasis, over the life of your partnership.

*Figure 2: Six activities for successful partnerships (Source: What Successful Partnerships Do: 6 key activities. Health Nexus, 2017.)*

## 1. Connect

Connecting with partners is not a "one-off" activity. You may need to connect to new partners[10], or reconnect with existing partners, at different times.

Tools such as asset mapping[11], network mapping[12], the Stakeholder Wheel[13] and the Equity Analysis of Group Membership template[14] can identify gaps, priority groups, and people for outreach (including those outside your sector and beyond your typical networks). Connect with and support people with lived experience of issues to actively participate in your partnership.[15]

Always reflect before you connect with new partners. Be clear about your own organizational priorities, positioning and history in relation to the people and groups with whom you are trying to connect. Take time to research online or to attend community events to learn more about the people and organizations you are approaching (and similarly, if reconnecting, to identify their current situations). Thoughtful relationship-building strengthens trust, compatibility and, ultimately, the productivity of your partnership.

Early stakeholder involvement in strategic decisions is one of six requirements for effective partnership work.[16] So, prioritize bringing essential partners to the table before you start analysing issues and developing options for action.[17]

On a day-to-day level, partnership work happens through relationships between the individuals who represent partnership members. When there are planned or unplanned changes in the people at your partnership table, design activities and take the time to facilitate transitions and continuity. Bring new people through a process of connecting to all aspects of your partnership: its vision, its history and achievements, its procedures and approaches, and its members.

To maintain connection among established members, make time occasionally outside of meetings to go for coffee or attend an event together. This allows for unstructured sharing that generally strengthens bonds among partners. Icebreakers to open meetings with your established group can also strengthen and celebrate connections.

## 2. Foster shared understanding

Partnerships build on diversity for strength. To produce this result, partners must get to know each other's histories and situations, and their related perspectives and priorities.

You may spend a great deal of time at the beginning of a partnership creating this shared understanding. Return again later to talking about members' different situations or perspectives. For example, parallel to reflections on the partnership's progress towards your common vision, invite each partner to share how their own unique organizational or community objectives are being met, or unmet, through the collective work.

Storytelling, check-ins or check-outs can foster shared understanding. Integrate these approaches into your meeting agendas.

Partnership arrangements that help build collective action welcome the exchange of diverse points of view as a way of expanding options for action.[18] In a healthy partnership, members are able to identify their disagreements and discuss them.[19] Openness and curiosity in the face of conflict nurtures shared understanding which will enhance equity and effectiveness within your partnership.

For another framework that normalizes conflict as an opportunity for deepening shared understanding and commitment, refer to Bruce Tuckman's famous 1965 stages of group development: Forming, Storming, Norming and Performing[20]. These stages apply to the process of a partnership's development as a whole and also to the process experienced when a new member joins your existing partnership.

## 3. Create a shared vision

Collaborations often, but not always, attract members with similar interests. Sometimes we assume that our partners share a common vision[21] without taking the time to agree on why and how we are working together and what we want to accomplish. Creating a shared vision requires seeking common ground between all people and organizations in the partnership. This shared vision will be a touchstone for the partnership whenever you plan collaboratively.

A vision statement communicates a partnership's desired future -- one that is achievable and which stretches the partnership beyond its current state[22] ("in ten years, we would like to see….").

The vision statement articulates what the group is about and should unite and inspire the partnership. Everyone should see themselves in the vision.

Tools that can help a partnership develop a vision include Paper Quilt, found in Health Nexus' resource The Power of Reflection: An introduction to participatory evaluation techniques[23] and pair share/small group discussions, such as the 1-2-4-all technique described in HC Link's Facilitation for Healthy Communities Toolkit[24].

## 4. Plan collaboratively

Once you have a shared vision of what the partnership will accomplish, you can begin to develop a strategic plan or workplan for the partnership. Through planning, partnerships establish a common language and culture. Planning happens at the beginning of a partnership and recurs periodically, often in conjunction with evaluation and renewal activities.

An equity and inclusion lens is critical for collaborative and effective planning, to ensure that all points of view are given equal consideration in discussions and decisions.[25] To do this, Health Nexus recommends clarifying principles of working together and using participatory approaches. Avoid (or define) jargon to support all views being heard and understood.

Be sure to prepare important planning discussions as a group (or a subgroup of your membership). Decisions about who facilitates may be important. Consider if the choice of a particular facilitator (due to social location or personality) may impact who feels safer to share dissenting opinions.[26] Consider if your planning facilitator can be a member of your partnership, or if an outsider's distance would be more effective. If you choose to have partnership members facilitate, having co-facilitators may be ideal.

Planning is crucial. However, time during a planning day is also well spent on exchanging stories to foster shared understanding, evaluating lessons learned and celebrating successes. These activities can be symbiotic.

# 5. Work together for change

Collective action is the glue that bonds together many partnerships. Sometimes a common deadline can ignite new energy. Sometimes after working through challenges, we experience a deeper connection with fellow partners. In effective and equitable partnerships, partners embrace a spirit of flexibility and modify what they already do to generate innovate collective action that advances the partnership's vision.[27]

Through the ups and downs of collective action, effective meetings are key to maintaining good communications and keeping on track with plans.

Clear and ongoing documentation of the status of workplan responsibilities and activities will help people stay involved and informed during busy times. For action-focussed partnerships, solid preparation and follow-up will make meetings worth everyone's time and effort.

Health Nexus' resource Effective Meetings[28] offers advice on the necessary components of effective meetings, broken down into three simple steps, including how small appreciation activities within meetings can enliven your work together.

# 6. Celebrate, evaluate and renew

Sustaining and improving your partnership requires monitoring and evaluating both your activities and your processes. And don't just count; celebrate those achievements!

Using participatory tools can enhance equity and inclusion in planning for evaluation, and in analysing data collected to determine "so what?". Health Nexus' Participatory Evaluation Toolkit[29] provides simple theory, steps and techniques so that any partnership can benefit from evaluative discussions -- regardless of whether you have resources to hire an outside evaluator.

Here are some simple questions for a process evaluation that can help renew your partnership:

- In what ways does our work match our desired principles for working together? How can we improve?
- When has our decision-making been most inclusive? How can we improve?
- How is our partnership expanding the sources of evidence we use to develop and guide our activities? How can we improve?
- What practices have helped us stay on target to meet our overall goal(s)? How can we improve?
- To what extent are partners feeling engaged and committed to our work together? What could improve each partner's connection to our work?

The Self-Evaluation Tool for Action in Partnership[30] is a translation-adaptation of the evidence-based Outil diagnostique de l'action en partenariat[31]. This tool can help evaluate how successfully your partnership is benefiting from a diversity of voices at the table, and how well poised you are to take advantage of opportunities for learning and innovation. It is published as a survey questionnaire for members of a partnership who voluntarily participate in self-evaluation.

# Parting words

A successful partnership is a process, not a destination. Partnerships move and change and must be continually nurtured – it takes work and time and it is not always easy.

But working in partnership allows us to accomplish far more than we can do alone. It has many advantages: more people to share the work, more heads to think and plan, more capacity for a stronger impact and a greater reach[32].

Tending to the qualities and activities described in this resource will increase your partnership's chance of success. Good luck!

# Tools for Developing Effective Partnerships

Many resources and tools can take you further in understanding and enhancing your partnerships. The Supporting Partnerships page of Health Nexus' website has short descriptions and links for several other resources published by us, as well as those published by others which we frequently recommend. Take a look, and see what can guide you through the next chapter of your partnership journey.

# References

[1] Quality Improvement & Innovation Partnership. *Community Partnerships Resource Guide*. Hamilton, ON: Quality Improvement & Innovation Partnership, 2010.

[2] HC Link. *Partnership Development*. Toronto, ON: HC Link, 2015.

[3] HC Link. *Partnership Development*.

[4] A.T. Himmelman. *Collaboration for a Change.* Minneapolis, MN: Himmelman Consulting, 2002.

[5] Health Nexus and Ontario Public Health Association. *"Collaborative Leadership in Practice."* Toronto, ON: Health Nexus, 2017. http://www.clip-lcp.org/

[6] Southwest Ontario Forum on Collaborative Leadership in Practice. *Principles of Collaborative Leadership Towards Equity*. Toronto, ON: Health Nexus and Ontario Public Health Association, 2017.

[7] City of Ottawa and City for All Women Initiative (CAWI). *Equity and Inclusion Lens Handbook: A resource for community agencies*. Ottawa, ON: City of Ottawa and City for All Women Initiative (CAWI), 2015.

[8] City of Ottawa and City for All Women Initiative (CAWI). *Equity and Inclusion Lens Handbook*. Ottawa, ON: City of Ottawa and City for All Women Initiative (CAWI), 2018.

[9] Health Nexus. *What Successful Partnerships Do: 6 key activities*. Toronto, ON: Health Nexus, 2017.

[10] A. Bilodeau, M. Galarneau, M. Fournier, L. Potvin, G. Sénécal, J. Bernier. *Self-Evaluation Tool for Action in Partnership*. Toronto, ON: Health Nexus, 2018. Item 11.

[11] Ontario Healthy Communities Coalition. "Tool: Mapping Your Community Assets." Community Development Strategies Online Course. Toronto, ON: Ontario Healthy Communities Coalition, 2008. http://www.ohcc-ccso.ca/en/courses/community-development-for-health-promoters/module-two-process-strategies-and-roles/tool-mapp

[12] HC Link. *Network Mapping*. Toronto, ON: Health Nexus, 2011.

[13] Tamarack Institute. *Stakeholder Engagement Wheel Tool*. Waterloo, ON: Tamarack Institute, 2017.

[14] Collaborative Leadership in Practice. *Equity Analysis of Group Membership: A template for Collaborative Leadership in Practice*. Toronto, ON: Health Nexus and Ontario Public Health Association, 2016.

[15] Bilodeau, Galarneau, Fournier, Potvin, Sénécal, Bernier. *Self-Evaluation Tool for Action in Partnership*. Item 2.

[16] A. Bilodeau, M. Galarneau, M. Fournier, L. Potvin. *L'Outil diagnostique de l'action en partenariat : Fondements, élaboration et validation*. Canadian Journal of Public Health, 2011, 102(4):298-302.

[17] Bilodeau, Galarneau, Fournier, Potvin, Sénécal, Bernier. *Self-Evaluation Tool for Action in Partnership*. Item 3.

[18] Bilodeau, Galarneau, Fournier, Potvin, Sénécal, Bernier. *Self-Evaluation Tool for Action in Partnership*. Item 6.

[19] Bilodeau, Galarneau, Fournier, Potvin, Sénécal, Bernier. *Self-Evaluation Tool for Action in Partnership*. Item 7.

[20] Bruce Tuckman. "*Developmental sequence in small groups.*" Psychological Bulletin 63, no. 6 (1965): 384–399.

[21] Quality Improvement & Innovation Partnership. *Community Partnerships Resource Guide*.

[22] Health Nexus. *Strategic Planning: From Mundane to Meaningful*. Toronto, ON: Health Nexus, 2016.

[23] Health Nexus. *The Power of Reflection: An introduction to participatory evaluation techniques*. Toronto, ON: Health Nexus, 2018.

[24] HC Link. *Facilitation for Healthy Communities Toolkit*. Toronto, ON: HC Link, 2017.

[25] Bilodeau, Galarneau, Fournier, Potvin, Sénécal, Bernier. *Self-Evaluation Tool for Action in Partnership*. Item 12.

# References continued

[26] Health Nexus. *Participatory Evaluation Toolkit*. Toronto, ON: Health Nexus, 2018. p4.

[27] Bilodeau, Galarneau, Fournier, Potvin, Sénécal, Bernier. *Self-Evaluation Tool for Action in Partnership*. Item 18.

[28] Health Nexus. *Effective Meetings*. Toronto, ON: Health Nexus, 2018.

[29] Health Nexus. *Participatory Evaluation Toolkit*.

[30] Bilodeau, Galarneau, Fournier, Potvin, Sénécal, Bernier. *Self-Evaluation Tool for Action in Partnership*.

[31] A. Bilodeau, M. Galarneau, M. Fournier, L. Potvin, G. Sénécal, J. Bernier. *L'Outil diagnostique de l'action en partenariat*. Montréal, QC: Direction de santé publique de l'Agence de la santé et des services sociaux de Montréal, 2014.

[32] Regroupement des agents de développement rural de Chaudière-Appalaches. *Ensemble pour le développement de nos communautés : Guide du partenariat en développement rural*. 2011, pages 4–7.

Health Nexus adapted and republished this resource to support organizations working on Political Action and Community Action projects with funding from Status of Women Canada (SWC). We hope this will be a practical resource as you create systemic change supporting women's empowerment and leadership. SWC-funded projects are invited to contact Health Nexus with any questions, or for partnership support coaching/facilitation on related themes at collaboration@healthnexus.ca.

The publication of this resource has been funded through Status of Women Canada's Women's Program.

Status of Women Canada Condition féminine Canada Canada

# Acknowledgements

Many thanks to the numerous writers and reviewers who developed materials from which this resource was adapted: Andrea Bodkin, Rebecca Buyers, Amanda Dupupet, Monika Goodluck, Robyn Kalda, Gillian Kranias, Christelle Thibault, and others.

---

Download this resource at:
http://en.healthnexus.ca/sites/en.healthnexus.ca/files/resources/planningforpartnership.pdf

Cette ressource est également disponible en français.

health nexus santé

***Healthy people, thriving communities***
***Des gens en santé, des communautés florissantes***

For more than 30 years Health Nexus has been working with diverse partners to help create healthy, equitable and vibrant communities where people of all ages can thrive. Health Nexus is a bilingual oranization that offers services and programs in English and in French.

To learn more, contact us at:

www.healthnexus.ca
416-408-2249 or 1-800-397-9567
info@healthnexus.ca
@healthnexus

---

Suggested Citation: Health Nexus. *Partnership Essentials*. Toronto, ON: Health Nexus. 2018.

All photos are by Health Nexus, unless otherwise specified.