Partnership Practice Guide

Guide 2: Commencing the Partnership

Guide 1
Preparing to Partner

Content
- Definition
- Principles
- Types
- Benefits
- Challenges
- Exploratory meeting

Tools
- Assessing the Need for Partnerships
- Continuum of Joint Effort

Guide 2
Commencing the Partnership

Content
- Questionnaire
- Mapping
- Communication
- Reporting
- Managing conflict

Tools
- Partnership Working Group
- Progress Report
- Terms of Reference

Guide 3
Sustaining the Partnership

Content
- Partnership lifecycles
- Support Strategies
- Evaluation

Tools
- Brief P/ship Questionnaire
- VicHealth Partnership Analysis Tool
- New York P/ship Self-Assessment Tool

Introduction

Welcome to the second Partnership Practice Guide of a series of three guides on partnering[1] designed to provide information, tools and resources to staff in the health, housing and community services sector and government departments.

The three guides are complementary to other guides and manuals available in the sector and can be read in conjunction with a) the Memorandum of Understanding 2009–12 between the Department of Human Services (DHS) and the Health, Housing and Community Sector, and b) the Collaboration and Consultation Protocol.

Who are the Practice Guides for?

The guide has been designed for any staff person or member of the partnership who has an interest in partnerships or partnering activity and is wanting an easy guide to commencing or sustaining a partnering arrangement.

1 The project was an initiative of the Human Services Partnership Implementation Committee (HSPIC) which has representatives from both sector organisations, including the Victorian Council of Social Service (VCOSS) and DHS.

The Next Guide

Guide 2: Commencing the Partnership provides suggestions and tools in the early stages of the partnership, including setting up systems and workflow processes.

Preparing to Partner

In Guide 1 – Preparing to Partner, an exploratory meeting is suggested between potential partners and the funding body representative to confirm joint activity, membership and structure of the partnership.

This involves setting shared direction and the potential tasks, roles, responsibilities, actions required, and to develop inter-organisational links.

Workplans are developed and desired results and indictors specified. Decision making procedures can be developed and reviewed to allow for meaningful flexibility and refinement. In essence, how it will work together. Below is a partnership Questionnaire that will guide this discussion.

VCOSS
Victorian Council of Social Service

Partnership in Practice

Partnership Questionnaire

The purpose of the Partnership Questionnaire[2] is to guide questions for the newly formed partnership in which to specify and plan key activities over the next 12 months. It is also designed to ensure that a process for monitoring and reviewing progress against timelines and tasks is considered.

Below is a checklist of questions to guide the discussions.

Q 1 – Are all members signed up?

Q 2 – Are Governance and shared management arrangements clear?

Q 3 – Are the Executive and practitioner (operational level) managers linked in?

Q 4 – Is there common values and common language?

Q 5 – How clear are the policies and roles and accountabilities?

Q 6 – Do the members have 'authority' to make decisions?

Q 7 – How are decisions made?

Q 8 – Are there processes for members to report back in their organisation?

Q 9 – How good are communications between the partner agencies?

Q 10 – Does the partnership access training?

Effective leadership or governance is a key success factor in developing a shared vision or purpose for collective action, establishing direction and promoting collaboration and consensus building principles.

Mapping the Partnerships

One of the challenges often presented to newly formed partnerships is the breadth and span of its influence and the extent of its representation. Mapping will assist in clarifying the organisations involved, their authority, key alliances and other interested organisations or individuals.

Mapping will help:

- Identify organisations and other key stakeholders and any strategic alliances that need to be involved
- Identify current service system or pathways through this partnership using the end user (client) perspective
- Analyse the key relationships and how they currently operate
- Assess current and potential value of each opportunity and relationship

How to map the partnership

It is helpful to draw a partnership map showing the key organisations/services involved strategic alliances to other service providers and funding bodies, and other stakeholders.

Map out the current service system or pathway through the program of which the partnership is representing.

Analyse the key relationships and how they work currently.

Commencing the Workflow

The physical location, access to equipment and resources will influence the effectiveness of the partnership. Similarly who and how the work will be undertaken. To a degree this will have been discussed prior to the commencement of the partnership but the actual schedule of meetings, who is present, work tasks and allocation requires further discussion and confirmation.

Defining roles

One of the key components of a partnering arrangement is a clear identification, discussion and clarification of:

- Roles
- Responsibilities
- Working arrangements or protocols – defining consistent approaches to who does what and how

2 Adapted from Morrison, T 'Towards Integration Checklist' from workshop reading material titled *'Understanding & Leading Inter-agency Partnerships'* 290109 The Centre Ivanhoe Victoria

Below is a template example for recording this.

Roles	Responsibilities	Working Arrangements (Who does what and how?)

Development of a strategic plan and workplan

The partnership may already have key goals identified (specified through the funding arrangement, for example data collection for service usage across a cohort or catchment) over a one, two or three year period. The development of an annual workplan can then specify the detail and contextualize the goals for local delivery.

The doing and the setting of tasks

Having established a workable governance structure, it should be clear how the work will be generated and who will undertake it, and finally how it will be reported.

The relationship between the governing body and any operational group(s) should be documented and known to the members of the partnership.

Structures that work best generally have a strategic arm, an operational arm (and in some situations, working groups). The latter are usually temporary, formed specifically to manage and be responsible for a particular task or activity or program.

In determining if the partnership would benefit from a working group, a number of questions can be asked.

Partnership Working Group

A Checklist to determine the need for and role of a Working Group is listed below:

Task	✔
Purpose and intended outcomes of group	
Powers of group (advisory or decision making)	
Membership	
Responsibilities and commitments of members	
Role of chair	
Process for recording views and making recommendations (for advisory groups)	
Process for making and endorsing decisions (for decision making groups)	
Frequency and duration of meetings	
Responsibility for executive support	
Confidentiality of meetings and documents	
Process for review of terms of reference and dispute resolution	

General questions to consider for working groups:

1. How many members are required and what type of skills do they need to have?
2. Will the member be expected to represent their organisation or community?
3. Which population groups should be represented?
4. What will be their time commitment? (How many hours per month for how long?)
5. How will member travel arrangements and expenses be handled?
6. Where, when, and how often will they meet?
7. Will the meetings be open or closed?
8. What rules of order will be followed?
9. What will the role of members be?
10. How will the group sustain itself?
11. How will the effectiveness of the groups be evaluated?

Terms of Reference

Those directly responsible for delivering the outputs/outcomes on behalf of the partnership will rely on the governing body for guidance and support to achieve these.

It may be appropriate to develop Terms of Reference to describe the purpose and structure of the working group.

Name of (Working Group)

Terms of Reference

1. Purpose:

The (name of Partnership Steering Group/Committee) will work towards (overarching statement about intent)

The (name of Partnership Steering Group/Committee) sets out to achieve (what outcomes)

2. Objectives:

List 2 or 3 objectives – The (name of Steering Group/Committee) will provide (advice, guidance…)

3. Membership:

The (name of Steering Group/Committee) comprises (name who) nominated by the (name who).

Name who will take minutes and/or coordinate meetings

The role of Chair is (name person and title).

All recommendations passed by (name of Steering Group/Committee) are to be signed off by (name body).

Location of each meeting will be determined (how and where?)

4. (Name of Steering Group/Committee) Procedures:

Process

Members will commit themselves to functioning in an environment that creates and extends opportunities for:

(Identify 2 or 3 adjectives to describe how you want the committee to operate)

This culture will evolve to the extent those members:

- contributions are given and received in trust
- speak openly on behalf of constituents, without fear or favour
- act as information conduits between (who and who)

The (name of Steering Group/Committee) will seek to:

- Support, engage, canvass and represent (which constituents)
- Disseminate information to (who) in an efficient and timely manner
- Ensure two way consultation and communication between (who and who).

Minutes and Agendas

Minutes will be taken and distributed by (name individual or group). Agendas will be compiled in consultation with (who and who) in consultation with the Chair.

Agendas and minutes will be distributed within one week prior to the meeting. Minutes will be distributed within one week of the meeting.

Absences

If a member is absent for three consecutive meetings without notice or justifiable reason, the committee will review their membership.

Sub committees

The (name of Steering Group/Committee) may establish ad hoc sub committees as required. Its membership may be extended (under what conditions?).

The (name of Steering Group/Committee) when establishing sub committees will:

- determine membership
- establish aims
- clearly define a process for decision making

Meetings

The (name of Steering Group/Committee) will meet (how often – monthly; bi monthly) for (two hours or more, specify) at a regular time. Subgroup meetings will occur outside of these times. The scheduled meeting times are (list dates, times and venue).

Resources

List other resources

Case Study

A partnership involving 6 agencies has been operating for 3 months. It has a governance structure in which all 6 agencies have one representative at the executive level which sets the strategic direction, and then a member each at the operational group. This latter group is responsible for the implementation of key activities.

A member from the operational group attends the executive group and discusses progress and issues at the implementation stage to the executive and back to the operations group.

The executive meetings are scheduled monthly and each executive member has one vote and decisions are made through consensus. These processes are documented in the Communication Plan.

The executive group endorse courses of action, recommends action or seeks more information from the operations group member attending.

The Communication Plan identifies how the partnerships will communicate progress and receive input from the sector.

The governance structure works well for all partnership members and through this structure are able to deliver key outcomes. A good relationship is enjoyed by all.

Communication

Communication is vital to the success of a partnership. Communication efforts should be initiated at the commencement of the partnership. Identifying the target audiences, crafting clear messages, and effectively communicating these messages to the target audiences will increase the likelihood of initiatives and their outcomes being accepted and used.

A good communication flow keeps people informed about what is going on. It promotes trust and a more friendly and satisfying working relationship; creates a more productive environment; helps to avoid conflict and helps partners achieve their objectives.

Hints

- Establish a communication plan and process (good communication among partners does not happen unless there is a plan in place and a process has been identified to support the communication)
- Identify who is responsible for communication between the partners
- Identify what information needs to be shared and with whom

- Select the best methods for sharing information. For example, when is written communication to be used and in what format, or electronic methods or face-to-face communication.
- Document results of meetings – what has been agreed to, what decisions are required and who will action them?

Reporting Options

Regular reports of progress help to maintain support and enthusiasm for the partnership and its activities. Brief, structured reports work better than extensive narrative. Reporting works best when it is linked to the annual work plan.

Reports are also a means of communicating with participating organisations and those whose support is required. They can be used to promote successes and to build and maintain support. The work plans should be the basis for official progress reports. Focus particularly on reporting against indicators and timeframes and milestones.

A standard format Progress Report is represented below.

Key Result Area			
Outcome	**Indicator / Timeframe**	**Expected achievement this month**	**Actual achievement this month**
Comments/Highlights			

Anticipating and Managing Conflict

Successful partnerships recognise that conflict is a natural part of partnering with diverse groups, and are able to anticipate and use conflict constructively.

Early discussion and the documentation of a process for resolving differences and conflictual situations is essential at this stage.

Hints

- Create a sense of interdependency among partnership members
- Create a sense among partners of being well informed by regularly providing updated information to them
- Work continuously to maintain a high degree of trust among partners
- Create a process of decision-making that is perceived by all as fair and open

Guide 3: Sustaining the Partnership

This guide identifies the essential criteria for maintaining a successful partnership including understanding partnership lifecycle stages and strategies, monitoring and review techniques, and finally evaluation options to check the health of the partnership.

Further Resources

Boydell, L 2001, 'Partnership Framework: a model for partnerships for health'. *Institute of Public Health in Ireland, Dublin*

Boydell, L 2007, 'Partnerships: A Literature Review, *Institute of Public Health in Ireland, Dublin* Ireland ISBN 978-0-9555912-3-5

Carson, E. & Kerr, L 2006, 'Evaluating government/third sector partnerships in Australia', *Governments and Communities in Partnership: From Theory to Practice, Conference hosted by Centre for Public Policy, University Of Melbourne Australia. September 2006.*

Pope, J & Jolly, P 2008, Working in Partnership: Practical advice for running effective partnerships, *Department of Planning and Community Development. Melbourne, Australia.*

Acronyms

The following acronyms are used in this Guide

CSO	Community Services Organisation
DHS	Department of Human Services
HSPIC	Human Services Partnership Implementation Committee
MoU	Memorandum of Understanding
TOU	Terms of Reference
VCOSS	Victorian Council of Social Service

Links

Partnership Forums and HSPIC

http://www.dhs.vic.gov.au/operations/regional-operations-performance/partnership-unit/partnership-forums-and-hspic

VCOSS

http://www.vcoss.org.au/