| Winnipeg Regional Health Authority / Office régional de la santé de Winnipeg — Caring for Health / À l'écoute de notre santé<br><br>**Practice Guideline** | **Clarifying and Learning from Partnership** | |
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| | **Approved by: Population and Public Health** | **Pages:**<br><br>**1 of 13** |
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## 1.0 PURPOSE:

Partnerships are an important mechanism in supporting the health of populations, which are affected by many interrelated health determinants. A broad range of intersectoral and community partnerships are required to support healthy communities.

WRHA is committed to working in partnerships that bring together a diversity of skills, expertise and resources for more effective outcomes.

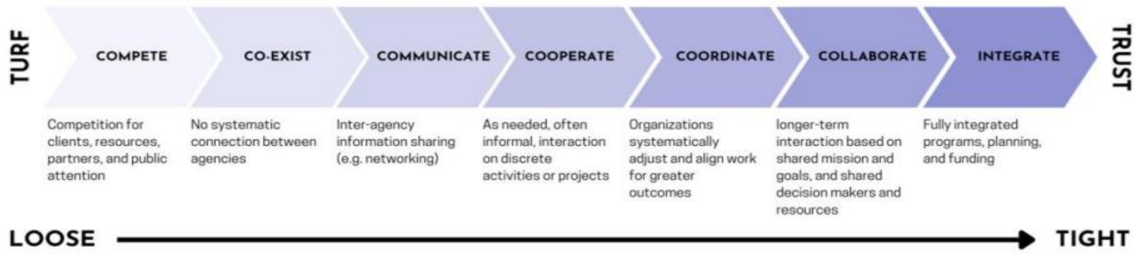
The purpose of this document is to provide guidance related to the process of determining the need for partnerships, developing and evaluating partnerships, as well as clarifying, sustaining and learning from partnerships.

## 2.0 SCOPE:

For public health practitioners working in intersectoral and community partnerships.

## 3.0 BACKGROUND:

By collaborating, a wide variety of different and complementary resources can come together to increase the health of populations. To be successful, partnerships must have a clear purpose, add value to the work of the partners, and be carefully cultivated and evaluated. Partnerships can range from networking to full collaboration (Collaboration - A Spectrum of Approaches 2022.pdf).




The nature of the partnership will depend on the types of partners involved and the ultimate outcomes and goals expected from the partnership. Outcomes may include products, services and programs. In some cases, outcomes may not be concrete, such as collaboration towards collective impact on a particular initiative (e.g. food security).

Clear agreements about partnerships ensure a common understanding of goals, objectives, roles and contributions.  Documented agreements reduce the likelihood of misunderstandings, disputes and unanticipated disagreements.

Evaluating partnerships improves accountability, the partnerships themselves, and often service outcomes.  Evaluation of partnerships may include factors related to the relationship, contribution, outcome, and the extent of change among participants or within systems.  Evaluation is used to improve the existing partnership, as well as future partnerships.

## 4.0 DEFINITIONS:

4.1 **Partnership:** A partnership is defined as a relationship where two or more parties, having compatible goals, form an agreement to do something together. Partnerships are about people working together in a mutually beneficial relationship, oftentimes doing things together that might not be able to be achieved alone.

4.2 **Partnership Agreement:** A Partnership Agreement is a voluntary document outlining the cooperative terms of at least two entities to contribute to a specific project or objective, or to clarify the contributions of each partner to ongoing work. In this context, the Partnership Agreement is not intended to be a legal document.

4.3 **Terms of Reference:** Terms of reference describe the purpose and structure of a collection of people who have agreed to work together to accomplish a shared goal. At a minimum, they include information about:

- What has to be achieved (e.g., purpose, objectives)?
- Who will take part in it (e.g., membership, roles)?
- How and when it will be achieved (e.g., group structure, meeting dates, decision processes, term of the group)?
- Renewal, termination or evaluation details?

4.4 **Locality Development:** Supporting local community members to define their strengths, identify problems and plan and implement strategies for change or action.

**5.0 GUIDELINE:**

As partnerships are being formed, both within and outside the WRHA, some consideration should be given to the partnership itself. The following appendices are intended as guidelines to direct public health practitioners in the process of developing and working in both intersectoral and community partnerships.

5.1 **The Partnership Toolkit (Appendix A)** can both be used to reflect on the continuum of partnering, including determining the need for the partnership, developing a partnership, evaluating the partnership and sustaining the partnership.

5.2 **The Partnership Agreement (Appendix B)** is typically documented at the beginning of a commitment and may be documented in a number of ways. Depending on the nature of the partnership, these agreements may be noted in one or more of the following:

5.2.1 Partnership Agreement Template (Appendix B)

5.2.2 Terms of Reference Template (Appendix C)

5.2.3 Minutes: may be sufficient if the partnership is very time-limited and the commitments of partners are clearly noted.

5.2.4 Documentation by emails or letter may be appropriate where contributions and agreements are being informally made in locality development initiatives.

5.2.5 A ‘Memorandum of Understanding’ or ‘Contract’ may be used in situations where a legal contract is being developed. This is outside the scope of this operating procedure and requires involvement of legal services.

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# Appendix A: Partnership Tool Kit: Program Version

The **Partnership Toolkit** developed by National Collaborating Centre for Methods and Tools (2012) can both be used to reflect on the continuum of partnering, including determining the need for the partnership, developing a partnership, evaluating the partnership and sustaining the partnership. The purpose of this step toward partnership is to determine what an organization can and, more importantly, cannot accomplish by itself. One goal of partnering is to expand the expertise available to develop a solution for the problem at hand.

This tool will help guide practitioners through this process. These questions are intended to prompt discussion about the need for new partnerships. Potential partners do not need to be engaged in this part of the process but will be engaged in later stages of partnership development.

**What Is a Partnership?**
A partnership can be defined as an organization of organizations working together for a common purpose (Himmelman, 2002).

**How Do I Use the Partnership Tool Kit?**
The tools can be used in a variety of ways depending on the level of development and the priorities of the program's partnerships. There is no set way to use the Tool Kit. It is intended to be used to talk about partnerships in general. However, it can also be used to further explore a single partnership.

**What Is in the Partnership Tool Kit?**
The Tool Kit includes four tools developed to reflect the continuum of partnering. To determine when to use each of the tools, it is important to identify the partnership's current stage:

- **Determining the Need for a Partnership:** if your program is considering a new partnership.
- **Developing a Partnership:** if your program has already identified a new potential partner or is already involved in a partnership that it would like to strengthen. The **Five-Action Developing a Partnership tool** is included in this step.
- **Evaluating the Partnership:** an integral part of all partnerships. This tool is an excellent way to start programs thinking about existing relationships and opportunities for further improvement.
- **Sustaining the Partnership:** provides critical information to begin a dialogue about this topic and its importance.

## Determining the Need for a Partnership

If your program is considering a new partnership, then the Determining the need tool likely would be most applicable.

**Potential Questions:**

- ❑ In what ways have you assessed your program's readiness to engage in a new partnership without damaging the quality of your current organizational commitments or relationships?

- What have you learned from previous partnerships that should be considered or applied to a new partnership?
- What could serve as a possible purpose or mission statement for a new partnership?
- What specific outcomes or products does your program hope to achieve through partnerships?
- In what ways do you need partnerships to achieve the identified outcomes or products?
- How would partnerships provide additional expertise vs. duplicate expertise in your program?
- To what extent do the perceived benefits of partnerships outweigh the perceived costs?

## Developing a Partnership

Finding the right organizations to partner with is a critical part of the partnering process. Effective partners often bring to the partnership qualities or capabilities that complement those represented by the organization seeking partnership. The goal of this action is to assess potential partners and make sure the best candidates are selected.

If your program has already identified a new potential partner or is already involved in a partnership that it would like to strengthen, then the **Five-Action Developing a Partnership Tool** is a good resource to start with.

**Action 1 of 5: Assess Potential Partnerships**

**Potential Questions:**

- What potential partners has your program identified?
- In what ways could nontraditional partners be helpful in a new partnership?
- What does your program aim to achieve by working with these potential partners?
- Are there historical or significant trust issues that should be addressed before creating a new partnership?
- How are your program goals and values compatible with these potential partners?
- How will these potential partners complement and strengthen your program?
- What might be some potential drawbacks to working with these potential partners?
- How would these potential partners help your program better achieve your goals and objectives

- What might your program and the potential partners gain through this partnership (e.g., increased visibility, increased access to priority populations, increased networking opportunities, opportunities for staff development, technical assistance, connections to key stakeholders, funding, improved image, exposure to influential others)?

- What specific resources[1] will these potential partners contribute to the outcomes or products expected from the partnerships?

- What resources does your program have available to contribute to new partnerships?

- Does your program have a history of good relations with these potential partners?

### Action 2 of 5: Determine the Appropriate Level of Partnership

Once the need for partnership has been established and potential partners have been identified, it is important to start thinking about the ways in which the partners will work together.
This section suggests definitions for four basic working together strategies, which are best understood and applied appropriately after assessing the relevance of time, trust, and turf issues. For example, networking requires the least amount of time and trust and no shared turf in working relationships, whereas collaboration commonly requires considerable time commitments, high levels of trust and extensive sharing of turf.

**Working Together Strategies**

**Networking:** Exchanging information for mutual benefit.
**Coordinating:** Exchanging information and altering activities for mutual benefit and to achieve a common purpose.
**Cooperating:** Exchanging information, altering activities, and sharing resources (e.g., staff, financial, technical) for mutual benefit and to achieve a common purpose.
**Collaborating:** Exchanging information, altering activities, sharing resources (e.g., staff, financial, technical), and enhancing the capacity of another for mutual benefit and to achieve a common purpose.

For more information about each of these working together strategies, see Himmelman (1996, 2001, 2002).

[1] Shared resources can include a variety of human, financial, and technical contributions, including program or community knowledge; staffing; stakeholder time; physical property; and access to people, money, and others (Himmelman,1996).

**Potential Questions:**

- ❑ Have you determined the appropriate working together strategy (i.e., networking, coordinating, cooperating, or collaborating) between your program and each of your potential partners?
- ❑ Is the anticipated goal of any of your partnerships likely to go beyond informal information exchange?
- ❑ How extensive are the anticipated resources (e.g., time, trust, interdependence) required by your program and each potential partner?

### Action 3 of 5: Determine a Mission, Goals, and Objectives for a Partnership

In a partnership, it is vital for partners to have a strong commitment to the common mission and to share accountability for implementation of goals and objectives. Determining the partnership's mission involves reaching a consensus about the basic purpose of working together.

This consensus should be based on a dialogue about the values motivating the proposed efforts and an agreement about the definition of the issues that the partnership will address. Clear partnership goals and objectives will focus the work of the partners and help them to determine what resources will be necessary to successfully implement their action plans.

> **A mission statement** can be defined as a simple, clear statement of purpose that is also a call to action (Himmelman, 2001).
>
> **Example:** To grow healthier communities by increasing access to fresh, local, affordable food
>
> A **goal** can be defined as a long-term activity to implement a mission statement and as a measure of progress toward achieving a mission statement. An objective can be defined as a short-term activity to implement a goal and as a measure of progress toward achieving a goal (Himmelman, 2001).
>
> **Example:** Increase the proportion of Winnipeg residents who increase their physical activity level.

Key stakeholders, including recipients of intended outcomes of the partnership, are important to consider when defining the goals of a partnership. Who are the key stakeholders of your partnerships?

**Potential Questions:**

- ❑ What does your program most want to accomplish through partnerships?
- ❑ What is the mission statement of your partnership?

- What are the goals and objectives of your partnership?

- Have you engaged a variety of stakeholders through your partnerships?

- How can key stakeholders be engaged in the process of developing partnership mission statements, goals, and objectives?

- Is there a shared understanding of and commitment to agreed-upon goals among your program and all partners?

- Are program partners operating at the appropriate level (see Action 2 of 5) given the identified goals?

**Action 4 of 5: Assess Resource Needs Based on Partnership Mission**

One purpose of partnerships is to bring together groups and organizations with complementary resources so that, collectively, they can accomplish a determined goal. Once the goal has been agreed upon, partners should participate in an assessment to determine the resources necessary to meet the goal. This process provides an opportunity to clarify the level of resource commitment necessary by each partner.

**Potential Questions:**

- Resources can include a variety of human, financial, and technical contributions, including program or community knowledge; staffing; stakeholder time; physical property; and access to people, money, and others (Himmelman, 1996).
- What human resources are necessary to effectively engage in partnerships for this program?
- What financial resources are necessary to effectively engage in partnerships for this program?
- What technical resources are necessary to effectively engage in partnerships for this program?
- What other resources are necessary to effectively engage in partnerships for this program?

**Action 5 of 5: Initiate or Enhance Partnerships**

The initiation period is the time to negotiate operational aspects of the partnerships, such as governance processes, capital investments, human resources, finances, and management practices (ONA, 2004), including establishing organizational roles. Documentation and institutionalization of agreements reached at this stage may be helpful in monitoring agreements and ensuring compliance over the span of the partnership.

**Potential Questions:**

- Have you identified the appropriate levels of partnership (see Action 2 of 5)?

- Written agreements provide an opportunity for partners to clarify roles and responsibilities. Written agreements, depending on the type of partnership may include:

    - **Partnership Agreement Template:** Appendix B
    - **Group Terms of Reference Template:** Appendix C

- In what ways can you describe and link needs to resources so that partners can address specific needs by offering relevant and appropriate resources?
- What have you done to learn about the culture of partner organizations (e.g., values or beliefs that should be considered when working with the partner)?
- Have you negotiated and established structural resources and processes necessary to implement partnerships?

    - Are the roles, responsibilities, and expectations within your partnerships clearly defined and understood by all partners?

    - Have the administrative, communication, and decision-making processes of the partnerships been established? Are these processes as simple as possible?

- Have you addressed the following institutional barriers to partnering?

- Have differences in organizational priorities, goals, and tasks been addressed?

- Is there a core group of skilled staff who are committed to remaining involved with the partnerships in the long run?

- Are there formal structures for sharing information and resolving disputes?

- How should power and decision making be addressed in your partnership?

- How should your partnership be structured and governed?

- How will partners monitor progress and evaluate the overall success of your partnerships?

- Are evaluation tools in place to demonstrate or document the outcomes of the collective work of your partnerships?

## Evaluating the Partnership

Monitoring and evaluation are an integral part of all partnerships. The goal of partnership evaluation is to improve partnership practice in progress, refine and test hypotheses regarding partnerships' contribution to performance and outcomes, and suggest lessons for future partnership work. Evaluation also offers an opportunity to assess how partnerships have changed over time and to make changes in partnership implementation as needed.

**Process Questions:**

- How effective is the partnership leadership?
- In what ways have the partnership's collaborative leadership capacity been built?
- Are there specific collaborative leadership concepts and skills (e.g., facilitation, conflict resolution) that need priority attention to enhance the depth and quality of existing collaborative leadership among partners?
- To what extent are the resources you have allocated for partnerships adequate (e.g., staff time, funding)?
- To what extent are the resources your partners have allocated for partnerships adequate (e.g., staff time, funding)?
- To what extent have you fulfilled your roles?
- To what extent have your partners fulfilled their roles?
- In what ways have barriers been eliminated and conflicts that made progress difficult been resolved?
- Describe any remaining barriers and unresolved conflicts that you may need assistance with in order to move forward in your partnership?
- How have partnerships solved problems that emerged during implementation?
- How have circumstances changed since each partnership began?
- To what extent has there been continuity in the staff assigned to the partnerships?

**Outcome Questions:**

- What data are you collecting to determine whether the goals of your partnerships have been met?
- What data indicate whether these partnerships should be continued?
- What specific kinds of decisions would you like to make based on your evaluation results?
- With whom (i.e., with what stakeholders) do you want to share what you learn?
- What do these stakeholders want to learn from the work (describe as specifically as possible)?

- How can evaluation findings help sustain what is important for partnering organizations and stakeholders?

## Sustaining the Partnership

Achieving sustainability of a partnership is an important and difficult task. Planning for sustainability must be initiated early and should be revisited frequently throughout the life of a partnership.

The suggested questions should help with planning strategies to maintain effective relationships.

**Potential Questions: Determine Need**

- Describe the understanding that you and your partners currently have about how your partnership can achieve and maintain sustainability.
- How have key partnership stakeholders been involved in determining this understanding of sustainability?
- What questions does your partnership need to answer to determine if your partnership should be revitalized, sustained, or discontinued?
- If you determine that your partnership should be sustained, how will you incorporate a review of the partnership's mission and goals in assessing whether sustainability efforts are moving the partnership in the intended direction?
- How will evaluation results be documented to make a case for sustaining the partnership?
- To what extent have you and your partners identified a clear need and commitment for continuing the partnership?
- How will you and your partners ensure that resources are available from internal and/or external sources to continue the partnership?
- In what ways have new sources of funding or new (local) sponsoring agencies been investigated?

## Appendix B: Partnership Agreement Template

The **Partnership Agreement** is typically documented at the beginning of a commitment and may be documented in a number of ways. Depending on the nature of the partnership, these agreements may be noted in one or more of the following formats: partnership agreement (formal), terms of reference (Appendix C), minutes or documentation by emails or letter (less formal), or a 'memorandum of understanding' or 'contract' (outside the scope of this operating procedure).

For the purpose of this appendix, the following template highlights key sections of what would be included in a formal partnership agreement.

**We, (partner A) and (partner B, etc.), have agreed to this Memorandum of Understanding (PA).**

**We have agreed to work in partnership and so agree to the following:**

1. **Name of partners and contact person with contact details**:
2. **Purpose (goals and objectives) and Scope**
3. **Terms of Partnership**
4. **Structure of the partnership**
5. **Background** *(include information that is necessary to understand the partnership agreement (PA), e.g. history of relationship, rationale for the PA)*
6. **Assumptions** *(note all relevant shared assumptions; identifying assumptions can help to develop contingency plans which may be noted in the PA)*
7. **Roles and Responsibilities of the Partners**
8. **Commitments of each partner** *(include all resource commitments being as specific as possible e.g., human resources, infrastructure, access to networks, in kind, financial resources, etc.)*
9. **Accountabilities** *(of the partnership and of each of the partners)*
10. **Communication** *(note meeting schedule or other agreements for communicating)*
11. **Planning** *(note how decision will be made)*
12. **Dispute Resolution** *(note how disputes will be resolved)*
13. **Other Details** *(may include ownership of jointly developed materials, confidentiality, etc., as necessary)*
14. **Current and Planned Activities**
15. **Logic Model** *(to determine the scope, activities, inputs and outputs, and confirm understanding)*
16. **Modifications and PA Review Date** *(create opportunities to review and modify the PA)*
17. **Partnership Evaluation** *(identify what aspects of the partnership you will evaluate, how and when)*
    - *Did we engage relevant partners in reaching priority objectives*
    - *What about the partnership agreement worked or did not work?*
    - *What improvements could be made to improve future partnership activities?*
    - *How did the partnership change health status, social status, organizations, systems and the broader community?*

## Appendix C: Group Terms of Reference Template

Terms of reference (TOR) describe the purpose and structure of a collection of people who have agreed to work together to accomplish a shared goal. At a minimum, they include information about:

- What has to be achieved (e.g., purpose, objectives)?
- Who will take part in it (e.g., membership, roles)?
- How and when it will be achieved (e.g., group structure, meeting dates, decision processes, term of the group)?
- Renewal, termination or evaluation details?

The following template includes key sections that are often included in group terms of reference:

1. **Name** *(Name of the group of people.)*
2. **Purpose/Goals** *(Note the primary goal and, if helpful, the secondary goals.)*
3. **Background** *(Sometimes background is helpful to provide context.)*
4. **Deliverables** *(What will the group produce.)*
5. **Membership** *(May include the type of member, member names, and member contact information.)*
6. **Roles and Responsibilities** *(Note who and how the group is chaired, who takes minutes and any other major roles for that group [e.g., treasurer, report writer].)*
7. **Scope / Reporting Relationships / Decision Making / Approval Processes** *(What are the bounds of decision making and responsibility for this group? What is in and outside the group's area of responsibility? To whom, how often, and under what circumstances does this group report? What can they decide on and what needs the input of others?)*
8. **Relationships to other groups** *(This may be helpful context.)*
9. **Method** *(Note how information is shared, how feedback is gathered and how decisions are made. Are they in person, by phone, by teleconference, by email, by social media? Are decisions by consensus, by simple majority, by unanimity, by a particular person or group of persons?)*
10. **Frequency or schedule of meetings and/or other important events.**
11. **Other** *(This may include information about committee projects or other things.)*

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