Creating a Partnership Strategy

A Field Guide

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Do you have questions, feedback, or additional examples to share? Please connect with us:
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Introduction

To make real traction on complex social problems, we can't go it alone.

Organizations with ambitious goals, such as ending childhood hunger in a state or solving a city's housing crisis, need partners in the work. Yet too often, organizations form partnerships without a clear purpose or focus, and the partnership eventually becomes more of a drain on resources than a lever for greater impact.

A partnership strategy can help. This field guide aims to guide you as you create a partnership strategy and grapple with questions about with whom to partner and how to make those partnerships meaningful and effective. We will walk through common stages of a partnership and offer actionable tools, questions to explore, and brief examples of what this work looked like for the education nonprofit City Year.

"Partnership" can be defined in myriad ways, from organic one-on-one connections to collective impact collaborations. Here is how we are defining it for the purpose of this field guide:

part • ner • ship

noun

An intentionally formed relationship between two or three organizations in order to meet goals that neither organization could fully meet on its own

The Partnership Lifecycle

A partnership will go through different stages at different times. This lifecycle demonstrates what those stages might look like for an organization creating a partnership strategy. It is imperfect—many partnerships may not move sequentially through the lifecycle and will navigate issues that do not fit neatly into a single stage—but it can provide some structure as you think about partnerships in your organization's context.

Identify Needs → Assess Potential Partnerships → Set Up a Partnership → Implement & Manage the Partnership → Learn & Evaluate

Step 1: Identify Needs

| Identify Needs | Assess Potential Partnerships | Set Up a Partnership | Implement & Manage the Partnership | Learn & Evaluate |

A helpful initial step in creating a partnership strategy is identifying needs and assets: What is necessary to have the impact your organization desires? What assets do you have to address those needs? Where are you not well positioned to address those needs?

Initially, your organization might come up with several focus areas that would speed up progress toward greater impact. To prioritize needs within that list, consider the potential impact, or in other words, the degree to which a partner focused on that need could help accelerate progress. Understanding the level of potential impact can help you categorize those needs as "high priority," "needs more consideration," or "low priority." To create a focused partnership strategy, you may want to select just one or two high-priority needs. Revisit this list occasionally, perhaps once a year, to see if the needs that fall under "needs more consideration" and "low priority" have become high-priority needs.

HIGH PRIORITY

NEEDS MORE CONSIDERATION

LOW PRIORITY
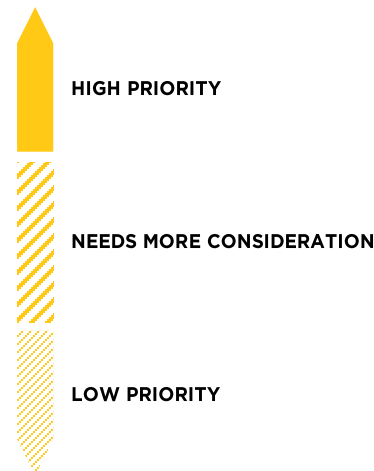
Questions to Explore

1. What are some of the biggest barriers that make it difficult for us to achieve our mission? What interventions might help us overcome those barriers?
2. Are we best positioned to lead those interventions, or should we explore potential partnerships with organizations already working in those intervention areas?
3. What might a partnership with an organization focused on a complementary intervention look like? To what extent would it involve each organization continuing with their current work unchanged, and to what extent would we need to change the way we work or create new interventions altogether? If it requires that we change the way we work, are we willing to do that?
4. Do we have the time and resources to manage this type of a partnership? What additional capacity might this require?

Step 1: Identify Needs *(continued)*

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Case Study

City Year, Part 1

Since 1988, City Year has recruited talented, diverse, and committed young adults to support student success and develop the next generation of leaders. Its 3,000 AmeriCorps members serve full-time in over 300 public schools as near-peer tutors, mentors, and role models—mature enough to provide guidance and young enough to relate to students' perspectives—who are able to forge positive relationships with students to help them succeed in school and in life.

Photo by Elliot Haney, courtesy of City Year

In recent years, City Year identified strategic partnerships with peer organizations that bring complementary capacities to its partner schools as a key accelerator for meeting students' holistic needs across the K–12 continuum, including in areas that fall outside of its direct services model.

City Year's approach has always been grounded in multi-sector partnerships and a belief that we all have a role in and responsibility for ensuring that children receive the supports they need to thrive in school and in life. More recently, the organization has focused on building deliberately designed national partnerships to accelerate impact within under-resourced schools. While building and managing strong partnerships is inherently challenging and complex, City Year knows the effort that goes into establishing successful collaborations is ultimately worth it—for both the students and the partners themselves.

In 2016, City Year saw a need to establish a business strategy for partnerships, building upon successful collaborations such as Diplomas Now, a school turnaround partnership with Talent Development Secondary and Communities In Schools that was validated through a large-scale randomized control trial. City Year sought to create a strategic framework and disciplined business process for prioritizing partnerships that would drive the greatest gains for its students and schools; enable focused decision-making and strategic resource allocation across the organization; and be responsive to the unique needs facing its communities and schools.

An important first step included identifying the partnership areas that would deliver the highest return on investment for students and schools. Two areas that emerged as key priorities include summer learning and student mental health/social service supports, based on the significant barriers that gaps in these areas pose to academic achievement and child well-being. As part of its enhanced approach to partnerships, City Year decided to focus its first pilot on summer learning to ensure students have access to engaging and rigorous opportunities for academic and social-emotional growth throughout the calendar year.

Step 2: Assess Potential Partnerships

Various situations might lead you to assess potential partnerships: Maybe you realize you need a partner focused on housing, but you are not sure who would be best to approach. Perhaps you and another organization have toyed with the idea of partnering more closely, but the purpose is not yet clear. Or maybe an organization asked you to partner with them, perhaps even a foundation whose request it might be tricky to decline. In any case, it helps to have pre-defined criteria to help guide your decision.

Your partnership criteria should be tailored to your context. When identifying how you will assess potential partnerships, you might consider criteria that indicate:

1. The level of **social change** that might result from partnering with a certain organization (though you likely already assessed areas of potential impact when identifying needs, you may also want to assess the extent to which partnering with specific organizations will help drive that impact),
2. The predicted level of **effort** for partnering with a certain organization or, in other words, how much time, staffing, funding, and infrastructure would be required to launch and evaluate a partnership with that organization, and
3. The potential partner's existing **relationships, network, reach, and reputation**.

On the next page, we've shared questions to help you define your partnership criteria. As you consider potential partnerships, reflect not only on the unique strengths of an organization but also the combined strengths you would both bring to a partnership: What gaps does your organization have that they might fill and vice versa? What strengths might be multiplied through a partnership?

> **Thinking holistically about your complementary assets might lead you to consider smaller and more grassroots organizations that could be great partners but might not have had access to the same resources and opportunities as larger, well-funded organizations.**

For example, an organization may not have a broad network of funders, yet it may have strong relationships with community members. If your organization has strong ties to funders, yet has a limited connection to community members, the partnership might leverage both of your strengths.

Step 2: Assess Potential Partnerships *(continued)*

| Identify Needs | Assess Potential Partnerships | Set Up a Partnership | Implement & Manage the Partnership | Learn & Evaluate |

The following questions can help you identify criteria to assess a potential partnership.

The criteria should not be used alone in making decisions, however. Instead, the criteria should serve as a launching point for exploration and lead to a more robust and nuanced assessment of the partnership opportunity. It should help inform conversations within your organization and with your potential partner before you make a final decision.

Impact

- Is there alignment between the potential partner's goals and outcomes and your goals and outcomes?
- Do you have a clear understanding of how this partnership would address the root causes of the problems you seek to solve?
- Are you and/or the potential partner able to collect the right data to understand the impact to which you are contributing?
- Would the potential partnership duplicate the work of other organizations or partnerships?
- Does the potential partner work in geographic locations or with specific communities that support progress toward your goals? Do you work in geographic locations or with specific communities that support progress toward the potential partner's goals?

Effort

- Do you and the potential partner share values? Are you aligned in how you make decisions and live out those values?
- Would you and the potential partner have sufficient capacity to commit to this partnership?
- Between you and the potential partner, would you be willing and able to raise any necessary funds you might need to cover costs related to the partnership?
- Are you and the potential partner confident that you can minimize turnover of leadership and other staff who would be key to implementing the partnership?

Relationships, Network, Reach, and Reputation

- Is there a positive relationship overall between your organization and the potential partner's organization? Do leaders of both organizations know and respect each other?
- Do both organizations have positive relationships with community members, funders, and other organizations?
- What other relationships would be important for the partnership to be successful (e.g., government agencies or corporations)? Do you and the potential partner have positive relationships with those entities?
- To what extent do both organizations' respective staff come from the communities you seek to serve and reflect the demographics of those communities?
- What risks might you or the potential partner pose to each other's reputations? What impact might those risks have on the partnership?

Step 2: Assess Potential Partnerships *(continued)*

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Sample Criteria Guide

A criteria guide can inform your decisions about whether or not to partner with an organization. However, this guide is not a stand-alone decision-making tool. It should be used to guide conversations within your organization and with the potential partner.

Potential partnership between: The Dream Forward Alliance (hypothetical potential partner) and Community Wealth Partners (us)

Potential Impact

Alignment between their outcomes and our goal(s)	👍	Strong
Duplication of other partnerships or organizations	👍	None
Current market overlap	⚠️	Minimal
Complementary approach to systems change	✋	Somewhat

Predicted Level of Effort

Alignment in how we make decisions	👍	Strong
Available capacity between their organization and ours	⚠️	Minimal
Commitment to fundraising between their organization and ours	👍	Strong
Staff turnover at their organization and ours	✋	Somewhat

Existing Relationships, Network, and Reach

Relationship between their organization and ours	👍	Strong
Both organizations' relationships with community members	👍	Strong
Both organizations' relationships with city leaders and state congress members	👍	Strong
Both organizations' relationships with funders	✋	Somewhat

Step 2: Assess Potential Partnerships *(continued)*

Identify Needs	Assess Potential Partnerships	Set Up a Partnership	Implement & Manage the Partnership	Learn & Evaluate

Case Study

City Year, Part 2

As City Year assessed national summer learning providers, one summer learning nonprofit organization in particular stood out: BellXcel (formerly known as BELL). BellXcel's summer learning model integrates academics, social-emotional learning, and community engagement. In addition, BellXcel's model is grounded in a youth development framework—like City Year's. BellXcel was also a strong potential partner based on its long-standing track record of high-quality summer programming, its ability to rapidly scale to new markets, and its history of successful relationships with schools, districts, and other nonprofit organizations.

City Year and BellXcel engaged in a series of conversations, which included representatives from local City Year markets, to learn more about one another's goals, strategies, and motivations for partnering. The prospective partners also took time to talk explicitly about their respective cultures and values, coordinate initial site visits so City Year staff could see BellXcel's summer learning program in action, and conduct a deep dive into City Year's school-based model. These activities helped build trust and affirm that the organizations shared a similar approach to student learning—one that is grounded in the power of positive relationships that help students feel supported and connected to their learning community. In the spring of 2018, City Year and BellXcel began piloting a partnership in Providence and Boston to explore the academic and social-emotional gains students—called scholars within the BellXcel program—make when they are served by City Year during the school year and BellXcel during the summer.

Photo by Elliot Haney, courtesy of City Year

Step 3: Set Up a Partnership

Identify Needs	Assess Potential Partnerships	Set Up a Partnership	Implement & Manage the Partnership	Learn & Evaluate

It can take time and several conversations before you and a potential partner are sure you want to move forward and are ready to set up the partnership. Once you are ready, you will want to make sure you are aligned with your new partner on the purpose of the partnership and to co-create a plan for implementing it.

You might consider creating a partnership agreement that outlines the partnership's vision, purpose, values, culture, governance, staffing, and other details on how you plan to implement the partnership. As you develop a partnership agreement or other plans for implementing the partnership, be sure to consider the elements below, which can also apply to collaborative and collective impact efforts.

1. **Build trust**: Trust is one of the most important factors in a partnership's success. Identify the values and behaviors that will guide how you work together. Have an explicit conversation about what you each hope to contribute to the partnership and to receive in return. By being honest and explicit upfront, you and your partner can ensure that you are both getting what you want out of the partnership.
2. **Talk finances**: If you expect the partnership may incur costs, work together to establish clear expectations for each partner's role in fundraising, how much funding is needed, and what to do if you raise more or less than expected.
3. **Clarify staffing**: Work together to understand the time and skills needed to manage the partnership, and then commit to dedicating the necessary time and staffing.
4. **Ensure good governance**: Agree on objectives, outputs, outcomes, processes for resolving conflict, and how to manage finances.
5. **Create communications processes**: Co-create a communications strategy to share information with your and your partner's staffs, your boards, each other, and your external audiences. This strategy should include expectations for how frequently you and your partner will check in with each other.
6. **Learn and evaluate**: Create a theory of change for the partnership and an evaluation framework that outlines how you will measure progress toward both partners' individual objectives and toward the partnership's objectives. Determine how long you plan to work together. Put mechanisms in place to check in on the relationship and revisit that timeline.

You can delve deeper into these elements in **this blog post on how to get intentional about your partnerships**.

Questions to Explore

1. Where do you anticipate encountering the biggest challenges to a strong partnership? What can you and your partner do to proactively address those challenges?
2. Of the six elements listed in this step, which is the most outside of your comfort zone (e.g., talking about finances or building an evaluation framework)? How might you and your partner approach that element together?
3. How can you and your partner maintain and strengthen your relationship over the course of the partnership?
4. Do you and your partner need a neutral facilitator to help you work through these elements or navigate conflict as it arises? If so, how might you agree on what you want in a facilitator and when to engage them?

Step 3: Set Up a Partnership *(continued)*

Identify Needs → Assess Potential Partnerships → Set Up a Partnership → Implement & Manage the Partnership → Learn & Evaluate
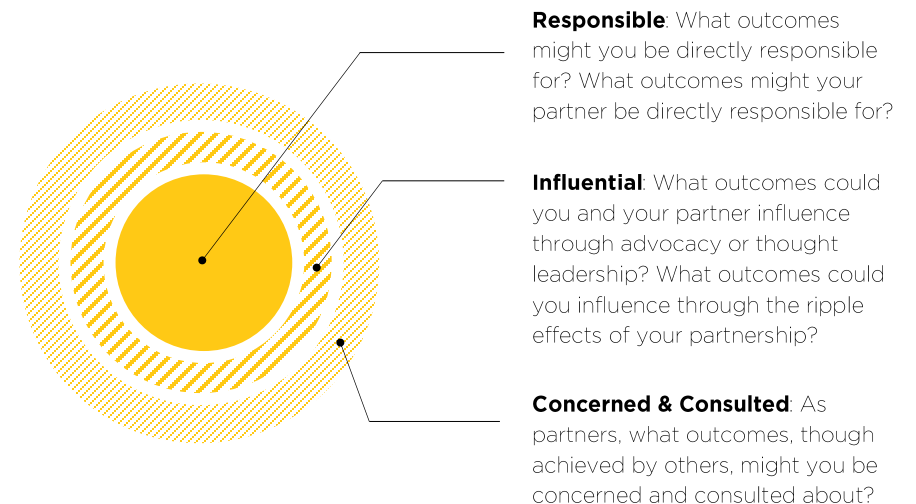
Case Study

City Year, Part 3

As City Year and BellXcel began forming a partnership, they consistently carved out time to build a strong foundation of trust and transparent communication. Early on, they designed a retreat with staff from BellXcel and City Year's national office, as well as school-based staff from the City Year Providence site—which then piloted the partnership—to align on a shared vision and goals. City Year and BellXcel each identified an individual on their strategic partnerships teams to serve as the main point of contact for the partnership. Those points of contact, in turn, regularly checked in with each other to understand what was working and what could be improved. The organizations also established a precedent of honest, upfront communication; when one organization proposed an idea that the other organization did not consider a priority, they said so, while leaving the door open to explore the idea in the future. That transparency added to the growing trust at the core of their partnership.

Spheres of Influence

The Spheres of Influence might be a useful tool as you consider what roles each partner will play. You can also use this diagram to think through what influence your partnership might have—influence that you and your partner might not achieve on your own—and whether the outcomes have a clear connection to each organization's goals.

Responsible: What outcomes might you be directly responsible for? What outcomes might your partner be directly responsible for?

Influential: What outcomes could you and your partner influence through advocacy or thought leadership? What outcomes could you influence through the ripple effects of your partnership?

Concerned & Consulted: As partners, what outcomes, though achieved by others, might you be concerned and consulted about?

Step 4: Implement and Manage the Partnership

Launching a partnership and managing the day-to-day work of maintaining it both require resources and time.

You and your partner will need to regularly check in to make sure you are clear on what you have committed to and whether you can still follow through on those commitments. We cannot overstate the importance of clear and frequent communication.

Ultimately, the strength of the partnership will hinge on the strength of relationships among individuals in the partner organizations. If the people who built the partnership are not the ones who will manage it, they should work closely with the partnership manager to ensure a smooth transition. During the transition, they can help the partnership manager understand and buy into the value of the partnership. They can also clearly translate the partnership agreements or, even better, involve the partnership manager in crafting those agreements. It is key that partnership managers from both organizations create space for relationship building. The individuals who are able to build strong relationships with individuals at the partner organization should prioritize finding ways to translate the value of those relationships to their broader organization. That will help ensure that the partnership remains strong, even when those individuals transition out of their roles.

Questions to Explore

1. How can you make sure you are checking in regularly with your partner and creating opportunities for the hard conversations that may arise with conflict? How can you ensure that you are both consistently aligned on expectations?

2. What opportunities might you create to strengthen relationships with individuals in your partner organization? How can you get to know each other better and have fun together?

Step 4: Implement and Manage the Partnership *(continued)*

| Identify Needs | Assess Potential Partnerships | Set Up a Partnership | Implement & Manage the Partnership | Learn & Evaluate |

Case Study

City Year, Part 4

Engaging local staff in the design of the City Year and BellXcel partnership helped to build buy-in for the effort during the initial stages and ensure that the partnership design could feasibly be implemented. As the partnership got off the ground, BellXcel and City Year's national office teams played a key role in facilitating local collaboration to provide consistency across regions.

Upon reflecting on the first year of the partnership, they realized that it would be beneficial for the national players to take a step back and create more deliberate systems and structures for partners to communicate and collaborate on a local level. These insights mirror important learnings from City Year's involvement with Diplomas Now. When a partnership has a national and local presence, it is critical to clarify national and local roles early on in the collaboration. Likewise, it is important to ensure that there are multiple layers of individuals from each partner organization contributing to the partnership. Building a broad relationship within and across partner organizations will not only help to lay a foundation for a transformative relationship, but it also will help to ease transitions should staff turnover occur.

Photo by Elliot Haney, courtesy of City Year

Step 5: Learn and Evaluate

Identify Needs → Assess Potential Partnerships → Set Up a Partnership → Implement & Manage the Partnership → Learn & Evaluate

You can delve deeper in **this blog post on how to foster a culture of learning**.

To avoid going through the motions, make sure to build in opportunities to reflect on the partnership.

Early in the partnership, you and your partner might create a learning plan.

A learning plan might address what you hope to learn, what evaluations you might conduct, what quantitative and qualitative data you each plan to collect and share, how you might make sense of the data and communicate it with stakeholders, and how you might make changes based on what you learn. Data sharing is particularly important to address upfront, both with your partner and with stakeholders, such as other organizations who have access to the data and the individuals represented by the data.

Make sure to approach evaluation with a spirit of learning, not just one of holding each other accountable. Evaluations are great opportunities to see what is working and to shift course, as needed. If you are working toward complex, long-term change, your evaluation plan should include smaller signs that bigger change is underway, like mindset shifts among community members. In the spirit of learning, you should also create opportunities to share feedback with each other. When done well, this can help strengthen both the partnership and individuals' relationships with each other.

Questions to Explore

1. At what points would it be best to collect data, make sense of that data, and make changes to the way your partnership is working in response to what you learn from the data?
2. Are you meeting your agreed-upon partnership objectives? Are both partners meeting their individual objectives?
3. What changes have taken place in your organization and in the broader society that might affect your partnership? What steps should you take to address those changes?
4. What data might you collect and leverage to understand the impact of your partnership?
5. What risks might be worth taking together? How might you learn from that risk-taking?

Step 5: Learn and Evaluate *(continued)*

Identify Needs	Assess Potential Partnerships	Set Up a Partnership	Implement & Manage the Partnership	Learn & Evaluate

Case Study

City Year, Part 5

Photo by Elliot Haney, courtesy of City Year

From the beginning, City Year and BellXcel agreed to approach their partnership with a learning mindset. Together, they developed a comprehensive learning agenda—to be refreshed annually—that addresses key facets of the partnership model, including City Year's recruitment support for BellXcel's summer program, school district engagement, and evaluating the partnership's impact. Ultimately, data sharing between the organizations proved to be a bigger barrier than anticipated due to the data sharing agreements City Year and BellXcel each had in place with their respective school and district partners. As a result, they were limited during the first year of the partnership in what data they could share with each other. A key insight from this challenge is that local strategies should be developed early on for engaging school and district partners in the partnership and evaluation planning process. By taking the time to thoughtfully involve school and district leaders in planning for a partnership's evaluation, organizations like BellXcel and City Year can ensure the partnership learnings are not only relevant to school and district priorities, but also that data sharing agreements do not inhibit their ability to gather meaningful partnership learnings and results.

Final Words

While we hope this guide provides clarity, partnerships are rarely as straightforward as the lifecycle might imply. They can be challenging, messy, and time-consuming, but they can also help us accomplish more than we could ever hope to achieve on our own. For those looking to make lasting systemic change, partnerships are essential.

The process of creating an intentional partnership strategy to address students' holistic needs has launched City Year's leaders and school-based practitioners into a series of conversations: What have they learned through their decades of working with partners that can be applied to current and future partnerships? How might City Year navigate the unique conditions and needs for partnerships at the national and local levels? How can City Year build a partnership strategy that is flexible to evolve over time, recognizing that national and local needs will continue to evolve? How might City Year support the change management process needed across the organization to gain traction with implementing a more intentional approach to identifying, building, executing, and, at times, exiting partnerships?

While City Year will continue to grapple with these questions for quite some time, it is beginning to see some preliminary results from its early work with BellXcel. In the small 2018 pilots in Boston and Providence, BellXcel scholars from City Year partner schools made gains in math and literacy similar to what BellXcel achieved nationally. In the summer of 2018, BellXcel scholars gained two months in literacy skills and two and a half months in math skills, on average. City Year and BellXcel continue to learn and refine their approach as they plan for the summer of 2019.

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Developing a more deliberate approach to partnerships required **carving out sufficient time and space** to build strong organizational alignment on City Year's enhanced partnership priorities and examine how this work can support the success of our students and schools.

—Christine Morin,
Chief Growth & External Affairs Officer, City Year

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At the heart of a strong partnership is **a resilient relationship grounded in open communication, shared accountability, and a mutual understanding** of what each partner hopes to gain from the collaboration. Commit to exchanging more than resources and time with your partner. A partnership flourishes when organizations view one another as true thought partners who can continually learn from each another on the path to achieving even stronger results together than could be achieved alone.

—Allison Hertz, Senior Director, Strategy and Innovation, City Year