**Expert Bank: Partnership toolkit**

**By Katie Pekacar - Independent Mind and Haringey Libraries
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## Partnership engagement toolkit

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## About this toolkit – what is it for?

This toolkit is designed to enable public libraries to develop and embed partnership development work following on from the expert bank support offered to Haringey Libraries by Libraries Connected.

It can also be used to develop a culture of strong partnerships throughout the library service by providing:

* Guidance about successful partnership working
* A model for partnership development in the workshop template
* Signposting to resources to support partnership development.

## Principles of successful partnerships

It can be easy to find people and organisations who are open to the idea of partnering with the library service. However, sometimes promising relationships seem to peter away or end up consuming more staff time and effort than the benefit they provide.

When developing new partnerships there are some principles that, if followed, can support the long-term success of the partnership.

|  |  |
| --- | --- |
| **Shared purpose** | Partnerships should always have a clear **purpose** which is well understood by both parties.*For example “to attract more Looked After Children into libraries” or “to provide more opportunities for residents to engage with digital making” etc.*This purpose should be **aligned with the strategic priorities** of both organisations in the partnership, otherwise it may feel as though one organisation is more invested than another and lead to **imbalance**. |
| **Mutual value** | **Both of the organisations in the partnership should be able to identify the value they bring**. It is important that the **library service** evaluates what it can bring to partnerships before starting new partnership projects, so that it can articulate its value to prospective partners.However it is also important that the library service **demonstrates an understanding of the value that the partner brings**. This can help to create trust and strong, equitable and positive relationships. |
| **Recognising differences** | It is important that initial partnership discussions **explore the differences** between the organisations, including in terms of organisational culture, strategic focus and language.*For example, a small community organisation may run entirely on volunteer support and lack project management capacity.**Health sector partners or arts organisations may describe similar activities or strategic approaches differently to public libraries. For example, using the term “audience” rather than “residents” or “service users”.*It is important to ask questions when you don’t understand a term that has been used or how it relates to the project idea you are discussing. It is also important to be **realistic** about whether you can successfully work in partnership with any given organisation. *For example, if the organisation is too small or under-resourced to have capacity to support the partnership. With larger organisations, if there is not senior ‘buy-in’ to the partnership purpose, it can get ‘lost’ and make it very difficult to progress.*Some organisations may struggle to engage with the processes that public libraries require e.g. risk assessments etc. and feel frustrated which will not create a positive partnership experience. |
| **Clear communication and governance** | For new partnerships to be able to start work, **clear communications processes** are crucial. This includes ensuring each organisation **nominates a lead contact(s)** and that they have time to support the partnership.It can also be helpful to set out a partnership document, such as a **Memorandum of Understanding** or **project plan** which both parties contribute do and which can be used to assess whether the partnership is on track.A **partnership steering group,** project board or other collective engagement mechanism can be useful both in terms of governance and ensuring the partnership is achieving its objectives, but also to maintain momentum and share information about the progress that the partnership activities are making. |
| **Organisational not just individual** | Some partnership relationships rely on the **personal compatibility of individuals**. However this can present a **point of weakness** if either of those individuals leave the organisation or move into different roles.Documents such as a **Memorandum of Understanding** can help to mitigate the risk, by placing the partnership on a formal organisational footing. It is also important to try and ensure that information about the partnership is **disseminated throughout the workforce** in all partner organisations and to include information about key partnership contact details and status reports in **business continuity** documents. |
| **Time and resource** | It is important to give partnership development the **time and resource** that it needs. Partnerships are **not an easy way of increasing capacity** in your organisation. Over time they may enhance your ability to deliver benefit to your communities, but in the short term they may require considerable resource to get started. It is important to plan for this and **ensure that staff have the time and resource they need** to develop and nurture their partnership relationships. |

## Getting started: Four steps towards successful partnerships

The four-step process here is intended to help you get to the point where you can start your partnership relationship.

### Step 1: What is the need for your partnership?

Partnerships that are developed without a clear understanding of how they address need can lack direction and feel as though they sap resources rather than adding resource to your organisation.

Your partnership development strategy should help you to deliver your organisational strategy and the aims of your organisation. There are two main ways to approach partnership development as part of your organisational strategy:

* Through a gap analysis which explores where you are less well placed to achieve your objectives on your own
* By adopting an “everything in partnership” approach

#### Gap analysis

Sometimes the need for partnership will be identified when you don’t have the skills or capacity in-house to deliver something important for your organisation.

*For example, you may identify the need to deliver more arts or sport related activities in the library but may not have the skills in-house to do this yourselves.*

***Everything in partnership approach***

In other cases you will have taken a strategic decision to deliver services in partnership based in a belief that this will lead to better services or better outcomes, not because you couldn’t do it alone if you had to.

*For example, partnering with grass-roots community organisations may bring greater buy-in and participation from certain residents within your population, or may result in services being designed and delivered collaboratively, helping them to better meet local need.*

However, it is still important to identify what the specific partnership opportunity is for external organisations. This will help them understand why this partnership could be useful for them, as well as helping you to achieve your aims.

*For example, your broad strategic aim may be to improve your Information and Digital Offer for residents. Citizen’s Advice may wish to work in your library spaces to offer drop-in appointments so that they can reach people who wouldn’t necessarily think to contact them directly.*

### Step 2: Identifying suitable partners

There are many ways that new partnerships can develop. Sometimes organisations will approach your library service with partnership proposals. On other occasions you will need to convene the partnerships yourself.

**When potential new partners approach you**

Library services with successful partnerships in place often attract new proposals for partnership. If you promote your existing partnerships people will see that you are ‘open for business’ and want to engage with you.

Often new library buildings or renovations of existing libraries attract interest in the local community and can result in partnership proposals.

It is important to assess partnership proposals carefully. The following criteria may be useful:

1. What would be the purpose of this partnership?
	* Does it help us meet our strategic objectives or open up new opportunities that are not currently available to us?
2. What value will this partnership proposal bring us?
	* What does this partner bring and how does that add value to our organisation?
	* Does this partner have the potential to extend the reach or raise the profile of our library service?
	* Will we be actively engaged in the partnership or do they just want to use libraries to access space or members of the public without our active engagement?
	* If so, is this actually an opportunity for a traded service rather than partnership?
3. Can we work with this partner?
	* How well do our organisational cultures and values align?
	* Do they have enough enthusiasm, skills and organisational capacity to support the partnership?
4. What resources do we have available to dedicate to this partnership?
	* Do we have any existing activity streams (e.g. programming) that this partnership could fit into or would it require dedicated support?
	* How much spare capacity do we have in our team and can it be deployed to support this partnership – what is the opportunity cost?

**Finding new partners**

When you are looking to develop new partnerships, it can often be most fruitful to **start local** and with organisations known to you or to people you work with across local government. This is because local organisations are more likely to see value in engaging with their local library service. Also, if they are local, they should be easier to communicate with, learn about and ensure you get buy-in to the project.

If no suitable local partners are available, the next step should be to **contact your professional networks**, either in London or nationally, to find out which organisations have expressed an interest in working with public libraries or have successfully completed partnership projects with public libraries in the past.

Finally, if none of these avenues is successful, it is possible to **develop partnerships by ‘cold calling’ organisations** or institutions that have the skills and expertise that you need, but these types of relationships can be riskier, both in terms of securing institutional buy-in and follow-through.

Having said that, it is not a failure to approach organisations about partnership and find out they are not interested or that the partnership cannot develop for other reasons. **The more conversations you have with external organisations, the more you learn** about the environment you are operating in, the challenges you may face and which kinds of organisations will work best in partnership with you.

In order to identify local partners or those known to you or your colleagues in your Local Authority, it can be useful to undertake a **stakeholder audit and map**. This is a two-step process which starts with:

1. A brainstorm with your team and/or conversations with other colleagues in your local authority to identify all the organisations they are aware of which may be relevant partners
2. A sifting process which allows you to identify which organisations have greatest potential for partnership and what kind of role they may wish to play in the partnership.

[The Partnering Initiative](https://thepartneringinitiative.org/tpi-tools/?gclid=EAIaIQobChMIqOvVpOGX6wIVgbHtCh37BAPSEAAYASAAEgKJmPD_BwE) has a useful simple one-page tool which can help with this process. <https://www.thepartneringinitiative.org/wp-content/uploads/2018/12/Stakeholder-mapping.pdf>

### Step 3: Engaging new partners

#### Understanding the value you bring to a partnership

When organisations embark on partnership working, they can be focussed on the value that the partners will bring to them. Although this may be the primary motivation, it is important to also think about the value you bring to a partnership. This will help you to sell the benefits of partnership with you to new organisations. It can also help you to feel confident in the partnership rather than grateful that organisations wish to partner with you, which can lead to imbalance in the partnership.

It can be useful to undertake a simple exercise which identifies your organisation’s strengths and resources. Considering what your organisation has to offer under the following headings may be helpful:

#### Putting together a compelling argument for partnership

Once you have undertaken this audit, you can take some time to put together a short ‘pitch’ which clearly and concisely outlines why someone should want to partner with you. This should take no more than 3-5 minutes to deliver and it is worth practicing it with another colleague or colleagues so that you can feel confident saying it on the phone or in person when meeting new partners.

[Fundraising.co.uk](https://fundraising.co.uk) has a blog article about how charities can use elevator pitches, which may be relevant to public libraries as well: <https://fundraising.co.uk/2008/12/24/how-good-your-elevator-pitch/>

**Find out about potential partners**

Before contacting potential partners, it demonstrates your respect for their organisation and commitment to good partnership working if you can try to find out some information about them. This could include:

* Any sites or services they operate and where they are located
* Who the CEO or similar of the organisation is and their background (LinkedIn can be good for this)
* What their most recent projects or activities have been.

If they publish their organisational strategy or mission on their website, it can be worth reviewing it and identifying any priorities you have in common. You can use this information to ask them questions when you first contact or meet them and it can often help to build trust and accelerate the partnership relationship if you put the time in to learn about them first.

### Step 4: Identifying what you want your partnership to achieve

This needs to be a shared activity, not one that is unilaterally decided by one partner. Although you should have an idea of what the partnership will achieve and how it will meet your strategic priorities, you need to involve your partners in agreeing the focus of any activities.

Below we set out an approach to identifying what your partnership will achieve which could be adapted for a range of different organisations and circumstances.

Haringey Libraries wanted to engage new partners around the delivery of its Universal Offers. This was a “partnership first” approach, using co-creation to work with groups of stakeholders to identify practical projects that they could work on together.

The following two-hour workshop structure was created to ensure that any partnership was centred around need and that activities were developed in collaboration together with new partners. It was based on a design-led approach for public services developed by [Nesta](https://www.nesta.org.uk/toolkit/designing-for-public-services-a-practical-guide/?gclid=EAIaIQobChMIreC4mcaY6wIViLPtCh3-HAoUEAAYAiAAEgJXSfD_BwE) and specific approaches for public libraries funded by the Bill and Melinda Gates Foundation <http://designthinkingforlibraries.com/>.

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| Workshop element | Purpose  |
| **Welcome****(c. 10 mins)** | * As the convening organisation the public library needs to welcome participants and make them feel comfortable
* It can be a time to explain why this specific group has been convened (in this case the Universal Offers have been used as a thematic framework so it would be a good idea to introduce these and how the library service uses them)
* This is also an opportunity to set the tone for the workshop – that it will be collaborative, creative and supportive of all participants.
 |
| **Introductions****(c. 30 mins)** | * This is an opportunity for prospective partners to get to know each other and share information about their organisation
* It is a space for the library service to ‘set out its stall’ in terms of what it has to offer in a partnership and to hear from other partners what they feel they can bring
* This section can take some time, but this allows each organisation to be heard and for the relationships to start to build.
 |
| **Problem identification****(c. 20 mins)** | * The purpose of this session is to use a design-led approach to understand what the issues are that the convened partners share a commitment to working together on
* In some instances these could be problems that the individual partners face in trying to achieve their missions
* However, in this case we were looking to identify what issues the people of Haringey face in relation to a range of issues.
 |
| In face-to-face workshops the following approach could be taken:Facilitator asks: * What problems does Haringey have in relation to [reading/digital and information/culture and creativity/health and wellbeing/children and young people]
	+ Participants think from their experience and their organisation’s perspective – what are the common issues you encounter?
	+ Participants the problems they identify on post-it notes and put them up on the wall
* Once all issues have been generated, the facilitator takes the group through a discussion:
	+ Who it is a problem for?
	+ What social and cultural factors that shape the problem in Haringey?
	+ How serious is this issue?
	+ How much of a priority is it for the Borough?

In online workshops the following tools can be used for note taking:* <https://padlet.com/>
* <https://jamboard.google.com/>
* These are collaborative tools, which allow anyone with the link to add their thoughts, but can also be used by facilitators to record the discussion.
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| **Creating the challenge brief****(c.40 mins)** | * This part of the workshop uses a co-creation approach to identifying how partners can work together on activities that address the problems identified
* It maintains a focus on ideas for meeting need but also allows partners to select problems which are most closely aligned with their organisational priorities
* It starts by allowing workshop attendees to brainstorm ideas in small groups, but by the end of this section one idea is selected by the group to take forward for project development
 |
| In face-to-face workshops the following approach could be taken:* Paired task initially – looking at the problems identified, create a challenge brief using the template supplied (see the [Nesta toolkit](https://media.nesta.org.uk/documents/nesta_ideo_guide_jan2017.pdf) for an example of this)
* Each pair reports back to the group with their challenge brief – as a group discuss what you like about each brief and what could be improved
* As a group agree:
	+ The focus of the first challenge you will look at (other challenges identified can be picked up later)
	+ Why the challenge is important
	+ How it relates to the strategic focus of the members of the group
	+ Constraints/context for this problem
	+ Any initial ideas for how to solve it (what is already being done? Any ideas on how successful it is?)

In online workshops, Zoom breakout rooms could be used to achieve a similar activity, or this could be completed 2-3 times as a whole group activity with the facilitator completing the proforma using Google Docs or some other similar online collaboration platform. |
| **Defining team roles****(C.10 mins)** | * This section is where the potential partners discuss what they can commit to the project and how they would like to work.
* It is important that key responsibilities are jointly agreed and ways of working discussed.
 |
| Facilitator leads the whole group to discuss:* Core team – roles and responsibilities
	+ Who will be the lead for this strand?
	+ Commitments of core team members
* Extended team – who do we need to engage and why?
	+ Brief stakeholder mapping exercise
	+ Ideas for when/how they need to be engaged
* Leadership team – who in the LA needs to be aware of this work and support it?
	+ Decision-makers identified
	+ Initial ideas for how to involve them floated.
 |
| **Next steps (c. 10 mins)** | * This is a crucial part of the agenda, where all the partners agree actions that they will take to further the partnership activities and develop the project idea
* In some cases, this may require organisations to reflect on the partnership project and how much time they have available to support it and whether it is truly aligned to their aims
* There should be opportunities to amend the project focus following reflection and for individual partners to step away if it is not a high priority for them
* For a project idea to be successful it will require at least two committed partners.
 |
| The facilitator sets out what the library service will do following on from this workshop, this should include sharing a summary of the project idea that has been agreed.* They should then invite partners to set out what they will do to progress the project idea. Possible activities include:
	+ Speaking to internal stakeholders about the project idea
	+ Exploring what resources they can commit to the project
	+ Consulting with service users about the project idea and involving them in its development
	+ Developing a project plan
	+ Starting to work on a Memorandum of Understanding or other partnership agreement
* All partners should agree a communications process for sharing information and it may be a good idea to agree a date when the partnership group can reconvene and assess progress and what needs to be done.
 |

Design-led approaches take a **test-and-learn** approach. This allows you to adjust your project focus depending on what works, what partners are available and where their interests lie.

Following on from a workshop it may be necessary to **check in** with partners to understand what their experience of the workshop was and how committed they are to partnering on the project areas identified. If there are no compelling ideas coming from the workshop, it may be worth reassessing the focus or working with individual organisations on other project ideas of mutual interest.

## How to develop and maintain the partnership for the future

### Building trust

Trust is a crucial aspect of partnership working, because you need to be able to depend on each other to deliver your agreed parts of the partnership activity and trust that each partner is entering into the relationship in good faith. The process of building trust starts at the beginning of partnership discussions and continues throughout the lifetime of the partnership.

### Doing what you said you would do

Partners have to believe that you will follow through on plans that are made in workshops and meetings. There are many ways to signal your commitment to the partnership and these include simple things like sending round meeting notes and proposed actions promptly, responding to questions promptly when they are asked and providing notice when things change e.g. key members of staff are unable to attend meetings.

The Memorandum of Understanding can be a useful document to set out the responsibilities of each partner and this should be reviewed at key points to check that everyone is still committed to their responsibilities.

### Equity and being able to influence the partnership

Although partnerships may not always be relationships between organisations of equal size and influence, they should always be equitable. The establishment of partnership or project boards can ensure equal representation of different organisations involved in the partnership, no matter how small their resources are.

[Effectivepartnering.org](http://www.effectivepartnering.org) is a UN sponsored organisation and it provides useful guides to developing equitable partnerships and building trust: <http://www.effectivepartnering.org/factor/collaboration-communication/trust-power-relationships/>

It highlights co-creation approaches, such as those set out in the workshop outline above as effective ways of building trust and ensuring that the voices of all partners are heard in a project and features a [report](http://stakeholderdialogues.net/media/uploads/Collective_Leadership_Studies_Vol1-Shifting_the_Way_We_Co-create.pdf) setting out practical ways to foster trust through co-creation, which can also help to resolve any conflicts that may emerge over the course of the partnership:

* Ensure that people can listen to each other’s differences in a structured way – to different points of view, approaches to solve a problem or interpretations of a situation
* Be open to contribution and authentic with participation – be transparent about how people’s inputs count
* Help people to see the limiting effect of judgement and create an atmosphere of building on each other’s ideas
* Identify the common cause and jointly clarity the common goal – acknowledge if people differ on how to reach it
* Attend to relationship building and backstage diplomacy when conflicts occur
* Be transparent about disagreements but focus on commonalities
* Show flexibility, not rigidity, but stick to jointly agreed principles and plans
* Be persistent and patient, show an understanding of the other’s problems
* Work on something tangible together and create experiences of joint achievements.

### Honesty about how the partnership is going

Because conversations about partnership often focus on the positive outcomes that can be achieved by working together, it can sometimes be difficult to acknowledge when things are not going well.

It is important to regularly review the partnership, both in your library team and together with partners and to foster a culture of honest communication between partners. Ensure partners know that they can tell you if things can be improved and for you to be able to do the same.

* One way to do this is to have a **standing agenda item** in project board meetings which discusses what has worked well, what has worked less well and how things can be improved.
* Use **agreed progress/impact/monitoring measures** to review the progress of the partnership as well as your own perceptions and experience of engaging with partners because these can be more impersonal/independent and can open up the scope for a conversation.
* However, it is also important that the project leads have a **good working relationship** and are able to talk honestly with each other and resolve issues as they arise. It can therefore be useful to explicitly **bring up the need for honest communication in partnership inception meetings** so that both parties feel they have ‘permission’ to raise issues.

### Funding bids as opportunities to develop partnerships

Collaborating on writing a funding bid can be a good way to test partnership working. If the funding bid is successful, it provides a focus which can bring greater engagement and resource to the partnership.

Funding bids to national funders such as Arts Council England and the National Lottery Communities Fund often require formal MoUs to be set up for the proposal to be competitive.

### Share the credit and celebrate joint successes

Ensure that any partnership **achievements are publicised** through your own publicity channels and support your partners to publicise achievements through their own channels. **Joint press releases** with quotes from all contributing partners can be a way of sharing the credit for successful work. Building a reputation for successful partnership working can both attract more and better partners and build your library service’s profile in the local authority and with decision-makers.

**Make sure that all partners are mentioned in your communications,** including on your website and in internal documents for decision-makers. Being generous and sharing the credit can often raise your profile, whereas not sharing can be a big reputational risk and make people less likely to want to partner with you.

### Know when to break up

It can be difficult to acknowledge when a partnership has run its course. Some partnerships will peter out or end naturally e.g. if a funded project comes to an end. However, at other times your partner may wish to end the partnership or you may wish to do so. Reasons for wanting to end a partnership could be:

* The project is not achieving its stated aims and you cannot see how it can be changed to do so or the partner is reluctant to put in place actions that would help achieve its aims
* Lack of capacity in your organisation or the partner organisation which means the partnership is not progressing
* Changes in funding or resources in either partner which mean you can no longer sustain the partnership
* Changes in strategic direction in either partner which means this partnership is no longer a priority for either them or yourself
* A clash of personality or organisational values which mean that the partnership is not functioning and a lack of will in one or either organisation to address these issues and see a way forward.

When a partnership is not working well it might be useful to use this checklist to see what the issue is and whether it can be addressed. Not all partnerships need to end for one of these reasons and sometimes there can be ways to overcome these issues, but this requires the effort and support of both partners to be successful.

It is a good idea to have a section that **plans for the end of a partnership in your MoU**, putting in place agreed processes for each partner to initiate the end of the relationship.

#### If a partner wants to end the partnership

* Acknowledge their contribution and thank them for it
* Ask for feedback and ways in which you could improve your partnership working in future
* Refer to the MoU and encourage your partner to follow any agreed steps e.g. handing over contacts in relation to project work, returning borrowed resources or providing agreed notice where spaces and/or resources are no longer needed
* Leave the door open for future partnership working, even though they are no longer your partner they are likely to remain a stakeholder.

#### If you want to end the partnership

* Explain your reasons for wanting to end the partnership, without attributing blame
* Acknowledge your partner’s contribution and thank them for it
* Refer to the MoU, as above
* End the relationship on a positive note if possible, as above.

## Appendix: tools for partnership development

#### Nesta

In addition to a toolkit to support design thinking in public services, noted above, Nesta has the following partnership toolkit, specifically designed for innovation projects: <https://media.nesta.org.uk/documents/Partnership-Toolkit-Feb-2019.pdf>

#### The Partnering Initiative

This website has a range of resources, including a partnership toolkit which are particularly well tailored to partnerships with community-based organisations with few resources.

In particular it has a partnership agreement scorecard template, which can be used to ensure memorandum of understanding reflects the needs of co-created projects:
<https://www.thepartneringinitiative.org/wp-content/uploads/2018/12/Partnering-agreement-scorecard.pdf>

#### The National Centre for Co-ordinating Public Engagement

They have a set of ‘partnership cards’ which can help to broker partnerships between new organisations. Although they are aimed at museums and higher education institutions, they can be adapted to any setting and the motivations for partnership are relatively broad and universal.
<https://www.publicengagement.ac.uk/nccpe-projects-and-services/completed-projects/museum-university-partnership-initiative>

#### GOV.UK

There is a template for a memorandum of understanding for schools’ partnerships which could easily be adapted to libraries and community partner organisations and a useful guide for writing a MoU here:
<https://www.gov.uk/government/publications/setting-up-school-partnerships>