



Partnership toolkit

February 2019

Identifying potential partners is one thing, but actually building a successful partnership that achieves its potential is a totally different ball game. It takes skill, care and some degree of luck. But more than that, it takes good preparation.





This toolkit has been developed assuming that you have already identified potential partners and you may already have had some preliminary conversations. This is the part that organisations are usually pretty good at! The hard part is defining the partnership and getting to implementation. This toolkit is designed to support this work.

The toolkit has been designed to help you prepare for getting your partnership off the ground practically, as well as structuring your written partnership agreement.

It should help to set you up for success throughout the partnership and help you and your organisation make the most of it.

This toolkit combines Nesta's experience with the great work of organisations like [The Partnering Initiative](#), [WWF](#), [Forum for the Future](#) and [Office of Deputy Prime Minister](#) (now the [Ministry of Housing, Communities and Local Government](#)) to get you started.

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SECTION 1:

Your go/no go checklist

Pursuing a partnership can be resource heavy and it is always worth taking a step back and asking yourselves if the foundations are right. Often relationships can be exciting at first, the chemistry can feel great but without a shared purpose the partnership will ultimately struggle.

Are you actually going to be able to work together? Do the people who are going to be working on the partnership feel connected to a common purpose and share common values? Are they committed as individuals to working together?

Make your own go/no go checklist to help determine whether it is worth investing resource in moving forward with the partnership. You can do this as a founder or as a team. It might be worth bringing some 'critical friends' into this conversation.

A go/no go checklist can also help you to prioritise which partnership might be the most promising one if you are having multiple conversations, and also help you to think about when it might be better to turn a partnership down.

Your go/no go checklist might include:



A clear opportunity for both parties to benefit

For a partnership to work, both parties must benefit. You might have to help your potential partner to understand how they will benefit from the partnership. Remember that they will need to sell the idea internally, no matter how senior they are. Think outside the box and seek input from others who bring a fresh perspective.

To help them understand the business case for partnership, consider whether they might benefit in any of the following ways:

- Professional development of key personnel.
- Expansion of knowledge base and expertise of personal and business.
- Better understanding of different markets.
- Better access to information and different networks.
- Improved operational efficiency.
- More appropriate and effective products and services.
- More opportunities for/and access to innovation.
- Enhanced credibility.
- Enhanced brand awareness.
- Increased access to resources.

Some partners might not understand the social problem you are working to address, or they might think that their work already addresses it. Do your research and give them the facts. Talk to people working in their industry for advice on what might resonate. Invite them to explore the problem you're working to address, for instance by showing them one of your projects, or bring one of your beneficiaries to your next partnership meeting. This will help bring it to life for them.

Parties are able to make equitable contributions to the partnership

Equitable does not have to mean equal. It means that you both understand and are happy that the contributions you intend to bring to the partnership are fair. As a first step, a simple mapping of resources across both parties can help to draw out what is and isn't on the table. This could be done in a workshop format, running through an extensive list of potential resources. An example resource map is set out in *The Partnering Toolbook*, by The Partnering Initiative and International Business Leaders Forum (IBLF), on page 14 and could be a useful starting point. It provides, for example, a detailed exploration of areas where partners can add value, such as expertise, relationships, accommodation etc.

Senior buy-in to work together

Are you engaging with people senior enough to make decisions, and unlock issues when they arise? What signals have you been given that there is senior buy-in - on both sides? Do you think this can last the test of time?

Acceptable level of risk

Consider risks like reputation impact, loss of autonomy, conflicts of interest, drain on resources and implementation challenges. Make sure you are comfortable that the levels of risk are acceptable.

If you can't put a tick next to any of the above boxes, you should consider whether the partnership is the right one for you.



SECTION 2:

Getting your partnership off to a good start

Converting a positive relationship into an actual partnership is about preparing the ground practically to reassure each party that you can work together, and that you are aligned in the right ways. Focusing on transparency as a route to building trust will also help, and make formalising how you work together (see section 3) more straightforward.

Where to focus?

It is important to embed the following practices into the DNA of your partnership early, and keep them front of mind. Losing focus with any of them could put the partnership at risk.

- 1 Articulate a clear shared purpose
- 2 Set up a steering group
- 3 Consolidate senior commitment
- 4 Utilise internal and external communications
- 5 Ensure diversity of input
- 6 Build transparent and open relationships
- 7 Ensure great project management
- 8 Find your facilitation guru
- 9 Establish a mindset for innovation

1 Articulate a clear shared purpose

This will bring the teams together, in tough times will give you the resilience to work to overcome issues, and keep work on track. Take time to establish a shared purpose at the start of the partnership, document it and keep it a focus of the work that you do. It might just be three sentences but this is your mantra, which will guide and inform your collective decision-making, and make life much easier.

2 Set up a steering group

A steering group provides the stability and objectivity that gives confidence to all involved, and reporting to a steering group can set a useful rhythm to work to. Give the steering group status to make it attractive to senior people who can influence and advise, and think carefully about the people you invite. Include representatives from each partner as well as people who represent the key stakeholders, for instance academics, policymakers, end users, funders, commentators, members of industry bodies etc. Consider who might be in a position to influence the success of the partnership - both from your side and your partner's. For example, think about including people who might offer added credibility, political influence or amplification through engaging others. Be mindful of who you leave out too. The size and scope of the steering group needs to be proportional to the size of the partnership. When first starting out, an internal steering group may be sufficient.

3 Consolidate senior commitment

Converting senior 'interest' into a firm commitment is important. Push to secure commitment (and flush out bluffers) by asking for action (e.g. attendance at a meeting, saying something publicly etc). You need someone who will champion your partnership at board level and help you navigate any major challenges. Senior commitment will also help your effective use of both internal and external communications to mutual benefit.

4 Utilise internal and external communications

Talking openly about the partnership can really focus the attention of both parties. It can bring to light issues and opinions that might not have been discussed before, and can help expose and iron out any problems. It can also give a partnership status which can attract more senior people around it, and motivate existing team members. It can also be a useful vehicle for getting commitments formalised on paper.

5 Ensure diversity

It's proven that effective innovation is more achievable with a diverse set of participants. Ensure diversity across a range of levels, such as your team members' backgrounds, specialisms and approaches and challenge both yourselves and your partner organisation to look for diversity in those that you are bringing to the table.

6 Build transparent and open relationships

Working in an open and transparent way early on will help you build trust. Be open, and request the same from your partner organisations. Take time to build personal relationships, and use open workshops rather than closed presentations. It will bring the teams together and give you the resilience to work on any issues. It's not just the outcomes that should be rewarding and enjoyable, but also the process itself, so don't rush it!

7 Ensure great project management

You will need to create a realistic project plan. Of course projects don't always go according to plan, but it is still important to have one and more importantly, to have a joint one. Value the project management around the process, but make sure that innovation is central to it. Call out when the plan needs to change and agree how to adjust it.

8 Find your facilitation guru

With resource-constrained partnerships efficiency is obviously key, but moving things along can be difficult with two very different parties involved. Identify the individual who can facilitate meetings to maximise effectiveness, get the best out of everyone involved, be the objective voice in the room and help decisions get made. They could be from one of the parties - in that case do make it clear which hat is being worn on the day - or brought in from outside the parties if resource allows.

9 Ensure a mindset for innovation

Points 1 - 8 will all help create a culture and practices for the partnership to innovate, but you will still need to build in time for creativity and idea generation, consciously focusing on innovation. Put your team's diversity to use to find new perspectives, and learn and reflect together. The NESTA *DIY Toolkit* includes some practical tools for stimulating innovation including structuring creative workshops, running fast idea generators and prototype testing.



SECTION 3:

Formalising how you will work together

When both parties are ready to commit to how they will work together, a partnership agreement will typically be drawn up.

This is essentially a document that both parties agree describes how you intend to work together. You will work through the agreement together and enter into it voluntarily. It will be open ended and readily re-negotiable, and will not be a legally binding 'contract'.

Reaching a partnership agreement is not intended to be a lengthy or brutal business negotiation. You may wish to use the table below as the agenda for a partnership discussion. Ultimately this table can be used to structure the actual partnership agreement itself. The size and depth of the agreement will need to be proportional to the size and nature of the partnership.

The following example has been taken from *The Partnering Toolbook* (page 45), by The Partnering Initiative and International Business Leaders Forum (IBLF) and we have included some questions in the second column to help guide your thinking.

1.0 Partner organisations

Details of the key person in each party

Partner A - Name and contact details.	• Name, Job Title, Business Address
Partner B - Name and contact details.	• Name, Job Title, Business Address
	• Add more if there are more than two Partners involved.

2.0 Statement of intent

Taking time to establish a shared vision early will help steer the partnership and including this in your partnership agreement will help flush out any misalignment.

<p>We, the undersigned, acknowledge a common commitment to/concern.</p>	<ul style="list-style-type: none"> • What is the social problem that you are aiming to address? • What is your overarching vision for this partnership? • What are the values that you wish to place around the partnership (e.g. trust, transparency)?
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By working together as partners, we see the added value each of us can bring to fulfil this commitment/address this concern.

<p>Specifically we expect each partner to contribute to the project in the following way(s):</p> <p>Partner A -</p> <p>Partner B -</p> <p>All Partners -</p>	<ul style="list-style-type: none"> • What is being contributed by the two parties? For example money, time, resource, expertise, connections.
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3.0 Structures and procedures

Clear governance will help progress to be made in the partnership, and can also reinforce a true 'partnership' of equals giving both parties equal voice.

<p>Partner roles and responsibilities.</p>	<ul style="list-style-type: none"> • What are the roles and responsibilities of each party? • How do you expect trust and respect to be upheld in this partnership? What would go against this? How would you raise concerns?
<p>Coordination and administration.</p>	<ul style="list-style-type: none"> • Who will coordinate the project? • How will each party report progress?
<p>Working groups/committees/ advisory group(s).</p>	<ul style="list-style-type: none"> • What governance structure is in place? • Who is involved? • What are the terms of reference?

<p>Decision-making processes.</p>	<ul style="list-style-type: none"> • How will decisions be made and in which forum? • How will you resolve conflict between the parties? • Would anyone external be brought in? • How would a decision be reached?
<p>Accountability arrangements.</p>	<ul style="list-style-type: none"> • Who is accountable for what? Both individually and Partners.

4.0 Resources

It is important to agree on what each party brings to the table and when.

<p>We will provide the following specific resources to:</p> <p>a) The partnership.</p> <p>b) The project.</p>	<ul style="list-style-type: none"> • In detail set out the resources to be provided, by which party, including metrics e.g. X days per week of project management. • Include timelines. • Include any conditions (e.g. if you do this ... then we will do this). • If money is involved, include when and how money will be paid and under what terms.
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5.0 Audits, reviews and revisions

Agree up front how and when you will monitor and review the partnership.

<p>We agree to make available all information relevant to this partnership to partners as necessary.</p>	<ul style="list-style-type: none"> • Is there anything that will remain confidential? Call it out here.
<p>We agree to review the partnership every ... months.</p>	<ul style="list-style-type: none"> • How often and in what forum will you review the partnership?

An independent audit of the financial arrangements of the partnership (and any projects resulting from the partnership) will be undertaken on an annual basis.

- Who will source this, and who will pay for it?

We agree to make adjustments to the partnership (including re-writing this agreement) should either a review or an audit indicate that this is necessary for the partnership to achieve its objectives.

6.0 Caveats

Include any other caveats that you want to add.

This agreement does not permit the use of copyright materials (including logos) or the dissemination of confidential information to any third party without the written permission of the partner(s) concerned.

This agreement does not bind partner organisations or their staff/officers to any financial or other liability without further formal documentation.

A glossary could also be useful to agree the definitions of any terms used in the agreement, and you might also look to consider adding points on how each party will describe the partnership publicly, and what the protocol is around branding and mutual use of logos and names.

In conclusion

With all of these tools and methods put in place, you'll be in a position to find, structure and formalise a partnership that's mutually beneficial, equitable, and sustainable, with acceptable levels of risk.



Further resources

- A** The Partnering Toolbook: The Partnership Initiative.
- B** The Partnership Toolbox: WWF.
- C** Cooking Up Change: Recipes for Successful Collaboration: Forum for the Future.
- D** Assessing Strategic Partnership: The Partnership Assessment Tool: Office of the Deputy Prime Minister.
- E** Building a partnership one marshmallow at a time.

About Nesta

Nesta is a global innovation foundation. We back new ideas to tackle the big challenges of our time.

We use our knowledge, networks, funding and skills - working in partnership with others, including governments, businesses and charities. We are a UK charity but work all over the world, supported by a financial endowment.

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