**Aboriginal Skills and Employment Training Strategy**

**Partnership Development Handbook**

Improving Aboriginal Employment Outcomes Together

**November 2014**

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# Introduction

In 2010, the Government of Canada established the Aboriginal Skills and Employment Training Strategy (ASETS).Through agreements with Aboriginal organizations, ASETS provides funding to help Aboriginal people prepare for, find, and maintain jobs. Under this strategy, ASETS agreement holders design and deliver employment programs and services best suited to the unique needs of their clients. This strategy focuses on three strategic priorities: demand-driven skills development, partnerships, and accountability.

Although the ASETS seeks to promote partnerships in a more targeted manner, partnerships have been a pillar of Aboriginal labour market programming for many years. Partnerships were considered an important component of the predecessor of ASETS, the Aboriginal Human Resources Development Strategy (AHRDS). Furthermore, the sunset Aboriginal Skills and Employment Partnership (ASEP) and the Aboriginal Skills and Training Strategic Investment Fund (ASTSIF), as well as the Skills and Partnership Fund (SPF) have all been dependent on partnerships as a pre-condition to receiving contribution funding from Employment and Social Development Canada (ESDC).

Building partnerships is not an easy task. Many challenges exist, however, the outcomes of partnerships outweigh the challenges and are generally overwhelmingly positive. Outcomes include access to additional resources and expertise, increased client outcomes and finally, there is a sense of mutual responsibility to reach better outcomes for the community.

*“Coming together is a beginning. Keeping together is progress. Working together is success.”*

- Henry Ford

# About this Handbook

This handbook is an adaptation of “The Partnership Handbook” (2000)[[1]](#footnote-1). It is meant to encourage the reader to think about business relationship strategically and provides useful tips on how to build partnerships that will have the most impact on client and project success.

Partnership information and a set of tools are provided to help guide one through all stages of partnership development.

The handbook is designed primarily for those who have an interest in partnerships. It is designed to provide a more in-depth understanding of the concept and the process to building and maintaining effective collaborations and partnerships. For those already possessing knowledge about the topic and/or experience in the field, this handbook provides a resource for further exploring partnerships and reviewing the basics of the partnership process.

**How to use the Handbook**

The Handbook is divided into 9 sections that are associated to 9 stages on the partnership cycle introduced on the next page, an image adapted from the Partnership Initiative Partnering Cycle[[2]](#footnote-2). The 9 sections are color coded and divided into 5 areas of concentration.

We hope that you find the content both useful and informative.

# The Partnership Cycle

**1**

**Defining Partnerships**

**Moving On**

**9**

**2**

**Identifying and Approaching Partners**

**8**

**3**

**Revising and Adapting**

**Assessing the Partnership Climate and Partnership Building Skills**

**7**

**Troubleshooting**

**4**

**Creating Partnership Infrastructure**

**6**

**Monitoring and**

**Measuring**

**5**

**Deliver the Partnership Project**

# The Partnership Cycle Legend

**Defining Partnerships**

**1**

Developing a common understanding of what is a partnership; determining if a project or relationship is appropriate for partnership.

**Identifying and Approaching Partners**

**2**

Conducting an environmental scan to identify potential partners; contacting and meeting with potential partners; discuss possible partnering options.

**Assessing the Partnership Climate and Partnership Building Skills**

**3**

Assessing readiness, willingness and ability to participate in a partnership; assessing and building partnering skills and attitudes.

**Creating the Partnership Infrastructure**

**4**

Setting a vision and defining goals; confirming commitment; mobilising resources; putting in place decision-making procedures, communication protocols and accountability mechanisms.

**Deliver the Partnership Project**

**5**

Developing an action plan; implementing activities; managing the partnership and the project.

**Monitoring and Measuring**

**6**

Tracking activities and commitments and compliance with agreement or plan; measuring the partnership relationship, project progress and results.

**Troubleshooting**

**7**

Identifying and dealing with problems and challenges.

**Revising and Adapting**

**8**

Making changes to the work plan, roles and responsibilities or the project goals if necessary; expanding the program if feasible.

**Moving On**

**9**

Confirming partners’ commitment; securing long-term delivery mechanisms; finding new areas to work together; implementing exit strategies; changing partners if required.

# SECTION 1

# Defining Partnerships

Defining Partnerships

Before discussing how to identify, build and foster partnerships, it is important to ensure that there is a clear, common and applicable definition for partnerships within the context of ASETS. Partnerships are the foundation to the other two strategic priorities of ASETS presented in the Introduction: effective partnerships can most certainly contribute to ensuring that accountability requirements are met and that training interventions and client action plans are linked to labour market demand.

**What is a partnership under ASETS?**

A **partnership** is a relationship where two or more parties, having complementary goals and a common purpose, work together in a way that will benefit all involved.

Partnerships are often formed when each of the parties individually may not be able to gain

the same results if they pursued these goals on their own. So each party gains from the relationship. Partners work together to meet objectives, and share the risks and rewards of

the project together.

While formed for a variety of purposes, all partnerships are driven by:

* Shared responsibility (each partner has a stake in the oversight of the initiative);
* Pooled resources (each partner invests something of value, be it time, knowledge, or a cash contribution);
* Mutual benefits from the partnership (partnership arrangements are expected to

provide value to each party); and

* Shared risk, responsibility and accountability.

Under ASETS, ESDC is interested in both formal and informal partnerships.

There are a number of advantages to formalizing partnerships and we will discuss this further in later sections of this handbook. However, here are a few examples to demonstrate the value of formalizing partnerships. For one, it is beneficial to put forward the partnership’s purpose in writing. This encourages each party to openly discuss their respective motivations and aims, as well as to explore the common objectives that brought them together. With the scope of the partnership well-defined, any incompatibilities or misunderstandings can be dealt with at the outset. Another benefit is that the distinct roles and responsibilities of each partner are clearly defined.

Expectations, duties, and accountabilities often require the clarity that comes from being transcribed on paper. With a clear definition of roles, each party knows what is expected of them, minimizing future surprises and potential discord. With these elements securely in place, partners are often better protected from both a legal and public perspective. This is especially important if there are financial resources invested in the partnership.

While this handbook is meant to support ASETS agreement holders with formal partnerships, it is understood that not all collaborations are formalized and that a continuum of collaborations/partnerships exists under ASETS - they differ in terms of size, scope, complexity, diversity of partners, and level of engagement. Furthermore, some partners are simply more comfortable governed by a handshake than an official or legal agreement. Nonetheless, most of the steps involved in the process of creating and maintaining effective collaborations applies to all types of partnerships, whether they are formal or informal. As such, the handbook can be beneficial by providing valuable insight as to how to structure such partnerships and collaborations in order to achieve common goals.

**Determining if a relationship is appropriate for establishing a partnership**

There are many levels and types of relationships that organizations enter into with other organizations or businesses. Some of these are beneficial to one party, others are mutually beneficial. Some relationships require that one organization performs a service for the other, while others require that the organizations work together toward a mutual goal. In addition, all organizations develop and establish numerous projects and initiatives. Some of these projects may benefit from collaboration with an outside organization, while others may not.

**Is it a partnership?**

Often, a business relationship or a service agreement can feel or appear to be a partnership. However, in many of these transactions, the partnership criteria may have not been met. As explained above, partnerships should be collaborative, both partners should benefit from the partnership and the partners should be invested in the project as a whole, and not simply contributing a service in the short term.

This does not mean that other relationships or arrangements are less important, or less effective than partnerships. In fact, an alternate arrangement may often be more effective than a partnership, depending on the context. Since partnerships imply a high level of commitment, work and involvement of the partners, it is important to consider these factors carefully when determining whether a partnership is appropriate. In order to make these decisions and prior to entering into a partnership, potential partners should ask themselves these questions:

* Have the parties agreed to share the risk, responsibilities, consequences and rewards of the partnership?
* Do the risks, rewards and responsibilities have value and meaning to all of the potential partners, or only to some?
* What is the added value of entering into a partnership agreement among the parties?
* Have all of the parties agreed to a common goal? Have they agreed, at least in principle, that working towards these goals together will result in a better outcome, than if they had moved forward individually?
* Do any of the parties have hidden motivations?
* Is this partnership genuine or have some of the partners become interested for the sake of appearances?
* Does one party hold all the power/significant influence to greatly shift the balance of power?

Potential partners should also think about their reasons for entering into a partnership. Here are some examples of strong reasons to enter into a partnership, particularly in the context of ASETS:

* Finding solutions to complex issues (for example, finding suitable and sustainable employment for clients with multiple and severe barriers to employment);
* Finding ways to share resources;
* Combining efforts to take advantage of opportunities;
* Adding value to ASETS services, programs or activities (for example, providing on-the-job training for clients through an employer partner);
* Integrating ideas, activities and goals with others (for example, working with income assistance providers and community organizations on goals to reduce chronic poverty or benefits dependence);
* Reduce operational or management problems (for example, entering into a mentoring partnership with another ASETS agreement holder or a regional Service Canada office to improve administrative or accountability capacity);
* Enable the continuation of activities with reduced resources (for example, working with partners to continue previous activities from the ASTSIF or the ASEP program by finding local organizations and employers that may be able to contribute to the ongoing success of the project);
* Attract expertise or specific knowledge or experience;
* Make good use of shared knowledge, know-how and ideas; or
* Eliminate duplication or overlap between similar groups (for example, finding ways to share information between income assistance organizations and ASETS agreement holders to determine who may best serve the client and at what point in their employment continuum).

The above list identifies several key areas where partnerships would be very appropriate as a means to meet ASETS objectives. However, conversely, you may find that there are other times when partnerships may not be appropriate, as explained in the introduction to this section.

Here are some examples where a partnership may not be the best course of action:

* Potential risks seem to be higher than the potential rewards of entering into the partnership;
* The balance of rewards seems to weigh heavily towards some organizations, and not for others;
* The level of contribution amongst partners is highly unequal; and
* The same goals could be met individually as under the partnership, or through an alternate relationship such as a service agreement. As a result the partnership is simply an added level of complexity that may not be needed.

**What a partnership is not**

It can sometimes be difficult to distinguish or label the relationships you have entered into with other organizations. However, it is important to determine the nature of a relationship, in order to manage the expectations of the parties.

For instance, there is a difference between entering into an agreement for services and a partnership agreement. An agreement for services is an agreement where one party performs a service for the other party, in order to help them to meet a certain objective.

**Consider this example:**

An ASETS agreement holder requiring heavy machinery training for clients approaches a local educational institution to see whether the institution provides heavy machinery training to students. The institution confirms that they offer the program and the ASETS agreement holder pays the tuition for each of the clients to obtain training at the institution.

Why is this an agreement for service, and not a partnership? The educational institution is simply providing a service to the ASETS agreement holder’s clients that is similar or the same as the service provided to any other student, and is being paid for their services. While student achievement is important to the educational institution, the ASETS agreement holder and the institution are not necessarily working toward common goals: the ASETS agreement holder’s goal is to improve Aboriginal employment outcomes for occupations requiring heavy machinery operators, while the educational institution’s goal is to provide quality training programs to students, and increase their number of students.

While the goals of the institution and the ASETS agreement holder’s goals are compatible, they have not entered into discussions to establish common goals. In addition, they have not taken shared responsibility for the outcome of the training (its success or failure).

**Advantages and Challenges of Partnerships**

Partnerships can have significant advantages, and have proven to improve outcomes for clients and organizations. However, it is important to note that partnerships can sometimes have challenges as well.

**Advantages of Partnerships[[3]](#footnote-3)**

* The pool of resources available to achieve common goals is increased; capacity to achieve goals is increased and provides learning opportunities.
* Partners can benefit from the complimentary skills of all of the organizations involved in the partnership. There is a wider pool of knowledge, skills and contacts.
* Partnerships can be cost-effective as each organization may contribute financially to a certain aspect of the project.
* As a result of the potential of lower financial contributions of each organization (due to the sharing of costs among partners), partnerships can also represent a lower financial risk to each partner.
* Partnerships can provide moral support and opportunities for more creative brainstorming, and may bring opportunities and insights into solutions that each organization may not have considered individually.

**Challenges of Partnerships**

* Partnerships include shared responsibilities, but not all partners can contribute the same level of effort into the partnership. How can the partners manage the relationship to ensure that each of the parties contributes to the partnership goals, while also respecting the time and resources of each of the parties?
* Partnerships require that each of the parties relinquish some of the control over the approach, the activities and the outcomes of the project. There is less individual control over the project as responsibilities become shared.
* Partners will likely need to consult with each other prior to taking actions or decisions. This can have an impact on the time it takes to accomplish tasks and can be an adjustment for partners who are accustomed to taking decisions and actions on their own.
* Partnerships imply a certain level of dependency. Each of the parties relies on the others to hold up their responsibilities under the partnership. However, sometimes outside factors can impact one or more organizations’ participation in the partnership. This can have a major impact on the implementation of and the outcomes for the partnership project.

**Examples of potential ASETS partnerships**

* An ASETS agreement holder develops a partnership with a not-for-profit organization that provides affordable housing to low income community members and promotes homeownership as a means to breaking the cycle of poverty. The home building not-for-profit organization sets out the parameters of the project. The ASETS agreement holder adheres to the project by providing volunteer clients to help build the homes.
* The ASETS agreement holder enters into a partnership with a local hotel, and educational institution and a youth centre to build and implement a strategy to encourage at-risk Aboriginal youth to enter careers in the hospitality sector. The ASETS agreement holder agrees to coordinate the program and will contribute tuition costs, job counseling and training allowances to the clients. The educational institution will contribute curriculum development and in-school support for the clients. The employer will contribute wages and on-the-job mentoring to the clients. Finally, the youth centre will provide client referrals and pre-employment counseling.

**Tips to Remember**

* A critical first step in the establishment of a partnership is the development of a shared understanding among all potential partners about what a partnership is and what a partnership is not.
* Partnerships are generally formed when there is agreement that working together will produce better results than working separately.
* Not everything that is done collaboratively is a partnership but, nonetheless, all types of collaborations can help ASETS agreement holders achieve their goals.
* There are numerous success stories from which we can learn. Don’t hesitate to consult fellow ASETS agreement holders, the Aboriginal Labour Market Bulletin[[4]](#footnote-4) or the report from the ASTSIF Best Practices workshop[[5]](#footnote-5) to identify potential models and tools to help you achieve your partnership goals.
* The array of partnerships under ASETS is vast, ranging from small community activities to more complex multi-structured projects.

[](#_2._Partner_Assessment)A tool made up of a series of yes or no questions meant to help highlight some of the important aspects of partnerships along with a partner assessment tool are included in the **Tools Section** at the end of this document on page 54. You can quickly view these tools by clicking on the tool symbol to the left.

# SECTION 2

# Identifying and Approaching Partners

Finding potential partners for projects can be exciting, yet difficult at the same time. Sometimes it is difficult to know where to start. Perhaps the simplest way to start is to brainstorm and make a list of organizations and businesses in the community that could have common or mutual goals to those of your organization, or could benefit from learning about those goals.[[6]](#footnote-6)

Identifying and Approaching Partners

**Consider various types of organizations:**

* Community organizations;
* Educational institutions;
* Chambers of commerce;
* Interest groups;
* Local government organizations;
* Provincial/territorial and federal government organizations;
* Private sector enterprises, small, medium and large enterprises, employers; and
* Community leaders, etc.

**Identifying Potential Partners**

Start with a network of contacts. Remember that while the organizations and contacts within your current network may not be appropriate or able to contribute to your current partnership goals, these contacts may be able to introduce you to other organizations that they think

would be appropriate for partnership.

Check the media (news release, announcements, etc.) to see if there are any upcoming

opportunities (e.g. opening of a new store or plant, investments in a particular sector, etc.)

in your area. Consult the internet and community resource guides.

**Collecting Information about Potential Partners**

Take the time to find as much information as possible on potential partners, including undertaking research to confirm the organization’s ‘track record’. This can be done by looking

at their website, reading their annual reports, visiting their main office to ask questions and/or asking others who know of the organization. This will help in making a stronger case for a potential partnership while informing next steps.

**Contacting and Meeting with Potential Partners**

Initiating contact with potential partners can take on many forms, ranging from attending workshops or meetings, cold calling, sending letters or asking mutual contacts for introductions.

**Discussing Possibilities with Potential Partners**

A preliminary dialogue can then be arranged with a senior member of staff from the prospective partner organization. This does not commit either side to a partnership - but it can provide a useful opportunity for both parties to assess at an early stage whether or not to proceed.

**Clearly articulate goals and aspirations for the partnership:**

* A good idea of what you would like to achieve is important;
* It is useful to identify why you think this partnership could be mutually beneficial to the organization you are speaking with; and
* Demonstrate flexibility and openness to other ideas and suggestions on who should be involved, potential benefits and how the objectives can be achieved.

In the [Tools Section](#_Sample_Presentations_to) on page 56 there is a sample presentation followed on pages 57-58 by a series of questions and answers to assist organizations in discussing the potential partnership with the organization in more details. These tools can help an organization highlight what they can offer in terms of support and resources to the partnership as well as the potential benefits to both parties in partnering together.

For example, in demonstrating benefits of working with an ASETS agreement holder, you can specify that ASETS agreement holders can offer practical benefits to employers, such as wage subsidies for clients as well as specific training for potential employees. They can provide clients with equipment (such as construction equipment) or uniforms, which other employees may not have access to. They can provide employers with insights on how to increase retention of Aboriginal employees, provide new employees and have a positive impact on public relations initiatives. Finally, ASETS agreement holders have an incredible resource that is often overlooked – their Aboriginal clients, who represent the fastest-growing segment of the Canadian population.

It is important to highlight the wealth of experience, knowledge and resources that your organization can offer a partnership. ASETS agreement holders should be confident in sharing this information with potential partners, and how it can be of benefit to them.

**Challenges in Bringing Partners On-Board**

Some may find it difficult to find partners who are willing to contribute to your organizations mandate and goals, especially in rural or remote areas. Some challenges faced are distance, limited available partners and lack of time and resources. These challenges are real and can make the early identification and approaching stages difficult.

All organizations face challenges when trying to bring potential partners on-board. The important thing to acknowledge is that there are some techniques that can help. Using the example of distance and limited partnership options, an organization could use technology such as webinars to help bring people together.

The absolute best thing an organization can do to prepare and meet the inevitable challenges of bringing partners on-board is to first and foremost know exactly what your organization can offer and bring to the table. The challenge is to sell your organization and the benefits to partnering with you.

Keep in in mind that some organizations will be much more willing to partner with already established partnerships. The advantage is that any potential risks are absorbed by more partners and some of the initial start-up as already taken place.

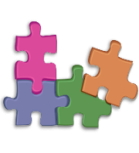
Be prepared to discuss previous examples of partnerships and projects that have worked well along with challenging projects and lessons-learned. Other strategies to mitigate this situation are also discussed in **Section 7** Troubleshooting.

ASETS agreement holders have consistently initiated and built strong successful partnerships. From large multi-national energy companies to partnering with training to employment institutions, each partnership development scenario inevitably presents a unique set of challenges and rewards.

**Tips to Remember**

* A partnership may be created to respond to a common problem or a shared opportunity.
* While at times finding common ground between potential partners can involve considerable effort, at other times it may be a natural progression from some other activity.
* Active marketing was considered key to developing relationships with potential partners at the 2011 Knowledge Circle ASTSIF Best Practices workshop. Ideas cited included raising awareness about projects among potential partners, for example by getting invited to local Chamber of Commerce meetings.
* Partnerships without a genuine desire to work together, or those set up simply to access resources, are rarely healthy and can cause imbalance and dissatisfaction all around.

**ASETSS**

Initiating and sustaining partnerships with other government departments, provinces and territories, and/or private sector are eligible activities according to the ASETS Terms and Conditions. Therefore, costs associated with partnership development are eligible expenses. For more information, consult the ASETS Guidelines on Eligible Expenditures.

Specifics

[](#_Sample_Introduction_Letter_2)A number of tools have been created to assist you in approaching partnerships. These include a “Sample Introduction Letter”, a “Sample Presentations” as well as “Questions and Answers for Potential Partners of ASETS agreement holders”. You can access these tools on pages 55-59 in the **Tools Section** at the end of the Handbook or by clicking on the Tools symbol to the left.

# SECTION 3

# Assessing Partnership Climate and Partnership Building Skills

Prior to entering into partnerships, organizations must consider the partnership climate. What does the “partnership climate” mean? Having an appropriate climate means that the right partners are ready, willing and able to participate in a partnership and, the timing is right to undertake such a partnership.

Assessing Partnership Climate and

Partnership Building Skills

**Testing the Partnership Climate**

When thinking about potential partners, organizations should first think about timing. Is it the right time of the year to think about embarking on a partnership? Do potential partners know what resources they have available to contribute to a partnership right now? Is it the end of

the fiscal year and they are waiting to hear what their budget will be for next year? Do partners have the time to commit to a partnership right now? Is it the beginning of the school year for educational institutions?

Above and beyond timing, organizations should consider the overall environment and working climate of each of the potential partners: Are any of the potential partners unlikely to take on

risk because of past experiences? Has an employer recently been involved in a similar

project that did not go well? Has the employer recently experienced some financial

uncertainty, and therefore may be unwilling/unable to enter into a partnership to hire new employees?

None of these issues are insurmountable. However, they are very important to consider when determining whom to invite to discuss a partnership, as these concerns may have an impact

on the scope and scale of the partnership project, may contribute to delays, or, finally, may

lead the potential partners to determine that the timing for a partnership is not right.

The overall environment will have an impact on the degree to which partners become

involved in a partnership. For example, an ASETS holder may want to contribute more to a project that will improve literacy and essential skills results if this was identified in their

strategic plan as a shortcoming in previous years. Conversely, an employer may be in a hurry to place 15 clients in jobs in order to meet employment equity standards or to ensure clients have access to pre-employment training.

There are other factors that may impact the partnership climate. Partner organizations may be going through organizational changes, which may reduce their ability to make decisions regarding the partnership project quickly.

Potential partners should discuss the factors that may affect their motivations, and their ability to contribute to the partnership. Following such discussions, partners will be able to determine whether the respective climates of each organization are compatible to form a partnership.

In order to best determine whether the partnership climate is favourable for the potential partners to embark on a project or goal, the following assessments should be made.

**Personal Assessment**

Firstly, an individual should undertake a self-assessment. This assessment will help each individual to determine their readiness, motivation and commitment to partnership development. Each individual should consider the following questions when contemplating a partnership:

* Why am I interested in this partnership? What is my motivation to be involved?
* Do I have the time it will take to be a productive member?
* Do I value teamwork and have a good attitude about shared responsibility?
* What skills and resources do I bring to the group?
* What will I require from my organization to be effective and feel supported?
* Are there any work or personal issues that might affect my partnership involvement (e.g. conflicts of interest, time constraints)?
* What (if any) unresolved conflicts, past history or baggage related to the partnership do I need to sort out?
* What personal and professional opportunities and advantages do I see?
* What fears or insecurities (if any) do I have about working with others in general?
* What fears or insecurities (if any) do I have about working with this particular group of organizations and individuals?
* Can I communicate and express my ideas, concerns and feelings in a group?
* Who or what am I representing?
* With what authority?
* Do others agree that I can represent them well?

**Organizational Assessment**

Each organization should also undertake an organizational assessment. Here are some questions to consider:

* Does the organization’s mandate fit with the primary interest of the proposed partnership?
* Are the organization’s values compatible with the work that will be undertaken?
* What resources (e.g. time, money, materials, space, and equipment) from the organization might be available for the partnership?
* Is there someone who can represent the organization in a responsible way, and can that person be spared at this time?
* How will the organization support their representative in the partnership?
* How will the partnership benefit the organization?
* How will the organization benefit the partnership?
* How much time will it take, and how will that time connect to the other activities of the organization?
* Is there any reason why the organization would not wish to be involved?

**Community Assessment**

Finally, the organizations considering the partnership should undertake a community assessment, when applicable:

* Is there a community plan in place into which the partnership activities might fit?
* How do you know the partnership is needed?
* How do you know there is support for this partnership from the community, other organizations and the people who will most benefit from it? What form might this support take?
* How would the partnership benefit the community?
* Who are the individuals or community groups that might be interested and appropriate to have involved?
* What sort of resistance to the partnership (if any) might exist?
* Is the political climate favourable for this venture?
* Are there any regulations or governance matters to be considered?
* What are the implications to others doing similar things in the vicinity of the partnership?
* From the community’s perspective, what is the best that will happen if all goes well? What is the worst?
* What are other initial factors that need to be considered?

This determination of readiness at varying levels will allow all partners to ensure that expectations are managed and that potential challenges are identified early. These assessments will also allow partners to better identify potential duplications and gaps. Finally, they will help organizations to understand their own investment in the partnership, as well as the level of investment of others and of the community.

**Building Partnership Skills and Attitudes**

In addition to assessing personal, organizational and community readiness to participate in partnerships, organizations should also assess skills and attitudes required to build and sustain effective partnerships. What skills are required to find, establish and foster partnerships? On the face of things, it would appear that building partnerships is intuitive. Most people and organizations recognize that objectives are accomplished more easily if they are accomplished collaboratively. However, the act of finding potential partners, discussing ideas, establishing a partnership and then participating in that partnership or even leading it requires specific skills and abilities. This section will help organizations to recognize these attributes and to build them, as well as to assist organizations to name people within their organization that may be best-suited to managing partnerships throughout the various stages of partnership building and implementation.

**Attitudes and Qualities**

**Attitudes/Qualities that are beneficial to partnership building include:**

* Respect for the people involved and the goals of the partnership;
* A strong sense of commitment;
* Openness to working collaboratively;
* Patience and perseverance;
* The ability to take risks
* Trust; and,
* Self-confidence.

These attitudes and personal attributes contribute to a successful partnership as they promote an environment of collaboration, mutual respect, and trust among the parties. However, some of these qualities may seem less obvious choices when describing what is needed for a partnership. For example, patience and perseverance, as well as self-confidence, may not appear to be obvious partnership attributes.

However, as mentioned previously, it is important for ASETS agreement holders not to give up and to know that there are many opportunities to partner and work toward mutual goals for the benefit of aboriginal clients.

Remember, ASETS agreement holders have considerable resources and expertise to contribute to partnerships. For example, ASETS agreement holders have a wealth of experience in working with and mentoring clients, and can support clients through all stages of a training program. ASETS agreement holders have also worked with hundreds, and in most cases, thousands of clients, and therefore have a lot of knowledge with regard to client needs and case management.

**Skills for Building Partnerships**

There are specific skills sets that are important and valuable to build and maintain partnerships. They include:

* Management skills
* Negotiation Skills
* Team Building Skills
* Planning and Time Management Skills
* Problem Solving and Conflict Resolution Skills
* Financial Management
* Skills Related to Managing Outside Help

Management Skills

Include a variety of general business, project and office management skills that ensure the competent implementation of a project or initiative. These include human and financial resource skills, leadership, and project management skills.

Negotiation Skills

It is almost certain that the partners will not have the same point of view about each point for discussion. In these cases, negotiation may be required. Decision-making strategies are discussed earlier in the document. Negotiation skills will prove to be very useful under consensus-based decision-making.

To be effective in negotiating you must have the ability to:

* Identify the issue or problem;
* Look at options and alternatives;
* Know why you want to partner with the other organization;
* Know why it is positive for the potential partner to enter into the partnership;
* Help individuals understand the views of others;
* Break the impasse if discussions get bogged down;
* Manage conflict when it occurs;
* Help find common ground;
* Assist members to recognize agreement when it happens; and,
* Ensure that everyone understands the agreement.

**Team Building Skills**

Essentially, partnerships become teams. Members will come from different backgrounds, with different interests, ideas and working styles. It will be a challenge to bring these varying organizations together to form a cohesive team or group; however, this is necessary for the success of the partnership. As a result, knowledge and skills regarding team building and group dynamics are essential and useful to building successful partnerships.

**Planning and Time Management Skills**

Each of the organizations involved in a partnership will have their own needs to fulfill and their own jobs to do. In most cases, participation in the partnership will be an additional responsibility. As a result, it will be important for the partnership to be well planned out: this will not only ensure that the project remains on track but also that each organization’s time is well respected.

**Problem Solving and Conflict Resolution Skills**

It is inevitable that problems and conflicts will come up throughout the implementation of the project given the diverse groups involved and the pressure to obtain results. It will be important to ensure that there are strong conflict resolution and problem-solving skills within the partnership. Some Information on how to resolve conflicts in partnerships is included in **Section 7.**

**Financial Management Skills**

Hopefully, each of the parties will be willing and able to contribute financially to the partnership. How the finances will be managed throughout the partnership is something that should be discussed early in the partnership. Each contributing organization may have its own financial reporting requirements for this contribution and may need specific financial information at key points. It is important that this is known prior to setting up the budgeting system for the project. It will also be important for a financial manager of the project to be named, and that the expectations of this person are discussed.

**Skills Related to Managing Outside Help**

Despite the collective experience and skills included within the partnership, the organizations may require further skills and specific tasks to be completed by organizations or firms outside of the partnership. Therefore it will be important for someone within the partnership to be experienced in contracting services and managing contracts. This will protect the collective investments of the partners.

As partnerships are a strategic priority of ASETS, it is important for ASETS agreement holders to think about the people within their organization that have some of these skills and whether those identified have the time and authority to build and manage partnerships.

**Commonly used strategies for the development of skills and knowledge are:**

* Training workshops or learning circles;
* Training opportunities offered within the community;
* Mentoring and coaching;
* Underlining why each partner wants the partnership;
* Self-directed learning; and,
* On the job training.

**Tips to Remember**

* Develop a good understanding of your personal readiness, as well as that of your organization and community. Ensure that you also take time to assess the partnership readiness.
* Ensure to obtain agreement of community leadership (i.e. Chiefs). Involving community leaders was recognized as an important factor contributing to the success of a partnership at the 2011 Knowledge Circle ASTSIF Best Practices workshop.
* Every member of a partnership has some skills and knowledge that will be useful. Taking the time to figure out how to best use these resources will benefit all involved.
* The skills and expertise that the partnership group doesn’t have can either be attained through training within the group or purchased from someone outside the partnership.

[](#_Assessing_Strengths_and_3)A tool titled Assessing Strengths and Challenges was developed as a way of self-assessing our own partnership building skills. The tool can be found at the end of the handbook in the **Tools Section** on page 59 or by clicking on the tool symbol to the left.

# SECTION 4

# Creating the Partnership Infrastructure

Creating the Partnership Infrastructure

Partners have been identified and are now ready to establish the initial Partnership/Project Infrastructure that will set out the rules of engagement and will ensure that the partnership project is implemented in a planned and orderly way helping to manage roles, responsibilities and expectations.

**Developing the project infrastructure can include some or all of the following steps:**

1. Setting a vision for the partnership;
2. Defining partnership goals;
3. Conducting an environmental assessment/SWOT analysis;
4. Assessing potential implications of the partnership;
5. Confirming the commitment of partners;
6. Selecting a project leader;
7. Determining roles and responsibilities;
8. Deciding how decisions will be made; and
9. Ensuring that communications protocols are in place.

**1) Setting a Vision for the Partnership**

In the early stages, having a clear idea of your goals as an organization and how you meet

your clients’ needs is a great place to start when speaking with potential partners. From this, your organization and a potential partner can begin to explore the potential benefits of partnering.

A Vision Statement should be a statement that paints a picture of the ideal outcome of the partnership. It encourages potential partners to look toward the future, and what the potential outcomes could be if the partners work together to help resolve the problem.

Here are some examples of Vision statements that could apply in the context of ASETS:

1. Through the work of this partnership, more Aboriginal people will be employed in the hospitality and tourism sector in Alberta.
2. Through the work of this partnership, the literacy and essential skills levels of Aboriginal people in Nunavut increase.
3. Through the work of this partnership, at-risk youth will gain exposure to numerous career opportunities and training experiences, contributing to better educational outcomes and reducing youth crime rates in Northern Manitoba.

The Vision Statement can help the partners to focus on what they want to achieve.

**2) Defining Partnership Goals**

The Vision Statement should identify where the partners want to go, and what the ultimate outcome of the partnership should be. Goals should be set by assessing where the partners are at now (current situation) and where they want to be (Vision Statement). Goals should not be problem solving statements or actions but rather a series of accomplishments that would contribute to the Vision.

Examples of Goals for each of the Vision Statements above:

Vision Statement:

Through the work of this partnership, more Aboriginal people will be employed in the mining and energy sectors in British Columbia.

Goals:

1. To develop an in demand mining and energy sector specific training program for Aboriginal clients.
2. To train at least 50 clients for work in high demand energy and mining employment.
3. To establish 40 job placements in the oil and gas sector in British Columbia.
4. To establish a mentoring and support service for clients undergoing training and job placements.
5. To achieve a 90% retention rate for employees placed in jobs through the program.

Vision Statement:

Through the work of this partnership, the literacy and essential skills levels of Aboriginal people in Nunavut will increase.

Goals:

1. To establish a network of literacy and essential skills educators and community organizations with the mutual goal of increasing Inuit literacy and essential skills levels in Nunavut.
2. To develop an effective client referral system for clients requiring literacy and essential skills training in Nunavut.
3. To provide clients with high quality literacy and essential skills training in all communities in Nunavut.
4. To provide clients with job-experience opportunities that will allow them to practice their new skills in a practical setting.

Vision Statement:

Through the work of this partnership, at-risk youth will gain exposure to numerous career opportunities and training experiences, contributing to better educational outcomes and reducing youth crime rates in Northern Manitoba.

Goals:

1. To develop a client assessment and referral process for at-risk youth.
2. To identify key employment opportunities for at-risk youth that will expose them to numerous careers.
3. To build career awareness curriculum that will help the youth to set career visions and goals, as well as actions that will help them to reach those goals.
4. To match youth clients with mentors in their preferred career field in order to support them in their career goals.
5. To achieve a return to school rate of 80% for clients participating the program.

The vision statement and the goals will help bring meaning to the partnership and help set its parameters. After creating the goals, it is also a good idea to test them, and ensure they are both appropriate, and, realistic:

**Organizations may find the SMART principles to be helpful in setting goals. Are your goals:**

|  |  |
| --- | --- |
| Specific? | Is the goal clear? Does it clearly specify what is expected? |
| Measurable? | Can you identify concrete criteria for measuring progress toward the realization of the goal (often of numerical value such as # of people reached or jobs created)? |
| Achievable? | Can you realistically achieve this goal within the time period and given the resources? |
| Relevant? | Does your goal matter to your organizations, your community? Is the goal relevant to other goals? |
| Timely? | Is this the right time to implement activities towards the achievement of this goal? Is there enough time to achieve the goal? |

**3) Conducting an Environmental Assessment/SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis**

Under the model suggested by this handbook, a number of assessments have already been completed. This information will be very helpful in defining the current situation and ensuring that conditions are strong for a partnership. However, despite a strong partnership environment, it remains important to try to understand the current environment in order to determine strengths, weaknesses, threats and opportunities for the partnering organizations. An excellent tool that can help us better identify and analyse these components is by doing what’s called a SWOT analysis.

A SWOT analysis is a method which involves specifying the goal of a project and identifying the internal and external factors that might impact the potential of reaching this goal.

**A SWOT analysis assesses the following:**

|  |  |
| --- | --- |
| Strengths (internal): | Characteristics of the organization or project team that give it an advantage over others. |
| Weaknesses (internal): | Characteristics that place the project at a disadvantage relative to others. |
| Opportunities (external): | Elements in the environment of improving project outcome. |
| Threats (external): | Elements in the environment that could cause trouble for the project. |

In the context of this handbook, the purpose of the SWOT analysis is to take a second look at the current context, given the more specific and targeted vision and goals of the project, as it becomes further developed. Is there anything about the partnership climate that the partners have not considered? Now that the organizations have a better understanding of what the partnership would like to achieve, are there further opportunities to consider, or risks that have not yet been identified?

**4) Assessing Potential Implications of the Partnership**

Each partner will be impacted differently by a partnership, and each partnership will have different potential implications, depending on the nature, objectives and goals of the partnership, as well as depending on the partners involved.

Legal and financial implications should be analyzed very carefully for each partner, prior to committing to a partnership. The analysis of these implications prior to committing to a partnership and beginning collaborative work will help to prevent difficulties later on in the partnership, as well as confusion and unintended consequences.

Assessing and documenting the legal and financial implications of the partnership is very important. Potential legal and financial consequences in the context of an ASETS partnership could be:

* What are the expectations of partners whom are contributing financially to the partnership?
* If the partnership is not successful, do any of the partners expect to receive their investment back?
* Are there any conflicts of interest to consider?
* Are there any liability considerations to take into account, for example, if a client should be injured while in training or at a job placement?
* Are there any legal obligations if one of the organizations should leave the partnership before determined end date of the project?

**5) Confirming the Commitment of Partners**

Once potential partners have considered the vision and goals of the partnership, the current environment, and any legal and financial obligations, they should have a good idea if they remain interested in taking part in the partnership, and are ready to commit to the mutual vision and goals.

It is advisable that organizations formally commit to the partnership. The form of this commitment will vary, depending on the goals of the partnership and the partners involved. The commitment does not necessarily need to be a legal document or a contract; it can simply take the form of a partnering agreement or a memorandum of understanding. The difference between an agreement and a contract is that an agreement is usually not legally binding and more readily renegotiable.

As mentioned previously, agreeing to collaborate might be all that some potential partners need to start working well together. However, a written commitment will solidify the partnership and will ensure that all parties have considered becoming involved in the partnership carefully.

It should be noted that some partners may need to have their involvement vetted and approved within their own organization. While this may add time, this is not necessarily negative. It will ensure that the partnership is well-known within the organization and that the representative within the organization is well-supported by the authorities within their organization.

**Examples of partnership commitments used by ASETS agreement holders in the past include:**

* Letters of understanding
* Letters of intent
* Memoranda of understanding (MOU)
* Partnership Charters
* Terms of Reference
* Contracts
* Legal partnership documents

Partners should consider these and other forms of partnership commitments and select a format that is most appropriate to the partnership and the project. Examples of partnership agreement tools have been included in the **Tools Section** for reference. In addition, many examples of the above forms are available throughout the internet and can be adapted to the specific circumstances of the partnership at hand.

**6) Selecting a Project Leader**

While a partnership is a collaborative effort, a leader, who will coordinate the project, manage its implementation and ensure that it is moving forward as planned, is often needed. Leadership can come from one organization, or it can be shared among the organizations in the form of a newly formed entity, such as a Board or Leading Committee for the partnership. Leadership can also rotate as the partnership moves forward. No matter the form of the leadership selected, it is important that leadership is defined and clarified for all members of the partnership before planning and work begins. Leadership should be reviewed at set times throughout the partnership so adjustment s can be made if need be.

**7) Determining Roles and Responsibilities**

The selection of a leader and ensuring that partners are committed are key components in ensuring a successful partnership. However, leadership and commitment on their own will not help to prevent conflict or to manage expectations. In many cases, some ground rules, expectations and clear roles and responsibilities are required to determine how partners will conduct business. Despite the fact that an overall leader has been identified, what is the overall responsibility of each partner? How often do the partners want to meet? What issues need to be considered by the overall group, and which ones can be dealt with by small working groups or individuals? How will meetings be conducted?

Discuss all of these details with the partners prior to embarking on implementation. This will add structure to the partnership and help ensure partners understand clearly their roles and responsibilities.

The partnership group may also want to consider setting ground rules through a code-of-conduct, a group charter or simple ground-rules statements. Ground rules will remind everyone of the importance of respect for others and acceptable behaviour.

Don’t hesitate to write the rules on a poster or flip-chart and post them at the beginning of each meeting. Or type them up and circulate a copy to all members and keep a copy on hand. It can be useful if an issue arises, to go back to the charter and remind everyone of how the group had decided they would work together. An example of a group charter is provided in the [**Tools Section**](#_Sample_Group_Charter) on page 61.

Examples of ground rules include:

* No interrupting other members;
* Respect other members time by arriving at meetings prepared and on-time;
* Listen to one another and allow each member to present his or her ideas; and,
* Discuss issues immediately rather than allowing situations to persist.

**8) Deciding How Decisions Will Be Made**

While a partnership is a collaboration and partners all have the same goals, it does not mean that all of the partners have the same style for making decisions, discussing issues and finding solutions to problems. It should not be assumed that the selected leader(s) will make all of the decisions. A partnership implies that the views of all partners should be taken into account in some way; however, there are many ways to do this. Determining a process for discussing issues and making decisions will manage the expectation of the partners, reduce confusion and help to prevent potential conflict.

Partners should discuss the various forms of decision-making and determine a manner of proceeding based on the work styles, commitment and interest of the partners. It is appropriate to engage in different forms of decision-making for different issues: for example, when an issue is very technical and is focussed on one part of the project, expert-based decision making may be the most appropriate. For transactional matters such as budgeting, the voting methods of decision-making may be most appropriate. Finally, for decisions that will have a significant impact on the project and its future, consensus-based decision making may be the best choice.

**9) Ensuring that lines of communication are in place**

Partnerships can be complex and include a large number of organizations; each of these organizations will have their own lines of communication and will need to continue to be informed of the project’s progress as it moves forward. In addition, partnerships may draw attention from within the community. If the project will have an impact on the community and on many (or even some) community members, the partners will need to determine a way to share information with the community on how the partnership is proceeding.

Furthermore, partners need to determine a way to communicate with each other, and to ensure that everyone involved in the partnership feels informed. As discussed in the previous section on decision-making, not all partners may be involved in all decisions. This does not mean that they do not want or need to be informed of progress. Partners should determine strategies for ensuring that all partners remain informed and feel they are being provided with adequate opportunities to contribute.

The communications strategy should include:

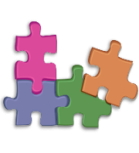
* The day-to-day information for the partnership group;
* Overview information for interested others - such as a brochure or handout;
* Specific information as required, for the media or for funding sources;
* Very focused information for support and lobbying purposes; and
* Information for the public or community at large.

**Tips to Remember**

* Following a partnership process makes the development of the partnership easier.
* All partners should be involved in describing the vision and setting the partnership goals.
* Partnership work well when there are clear decision-making protocols/procedures agreed to and in place.
* Each member should understand the legal and other implications of forming a partnership since partnerships mean shared resources, power, risk and benefit. Seek outside advice or technical assistance if it is required.

**ASETS**

Specifics



Your partnership project should align with the partnership strategies and priorities you identified in your Strategic Business Plan (SBP). Compare you partnership’s vision and goals to your partnership priorities. If adjustments are required to your SBP, you should specify this in your Annual Operational Plan (AOP) as well as be prepared to discuss in during your Mid-Year Dialogue (MYD).

[](#_SWOT_(Strengths,_Weaknesses,_1)Tools have been developed and are included at the end of this document in order to help clarify and support the information introduced in **Section 4**. The tools titled “*SWOT Analysis Questions*” and “*Sample Group Charter*” can be found in the **Tools Section** on pages 60-62 at the end of this Handbook or by clicking on the tool symbol to the left.

# SECTION 5

# Delivering the Partnership Project

Now that partners have come together, there are some excellent techniques and tools that will help all parties deliver the project in a positive and effective way.

Delivering the Partnership Project

**Action Planning**

Once partners have set a collaborative vision and goals, and have committed formally to the partnership, it is important that an action plan is developed that will guide the partners in implementing tasks and meeting their goals (and hopefully, to achieve their vision).

An action plan should include the following:

* Clear ”mini” action plans related to each partnership goal;
* An identification of the resources available to the partnership and how they will be used; and
* A clear understanding of the role and responsibilities of each partnership member.

The action plan should look at each goal set out for the partnership and bring it to life.

Partners ask themselves what it will take, in concrete terms, to achieve that goal.

Action plans are developed by:

* Reviewing your understanding of the current situation;
* Identifying concrete steps that close the gaps between the current situation and reaching the particular goal;
* Determining the resources that are needed to undertake the actions;
* Identifying whom will take lead responsibility for undertaking each action;
* Estimating the timeframe required to complete the tasks or actions;
* Identifying any support that may be required; and
* Establishing key milestones or decision points to help you assess whether or not the action plan is on track.

**Process for Developing an Action Plan**

It is important that all partners feel involved in the action planning, even if all partners will not be involved in all aspects of the project. The action planning process can be undertaken in a manner similar to a brainstorming session. This is the opportunity to get as many ideas on the table as possible.

For each goal, you can use the following sections to develop your action plan. Once the actions have been selected, they can form part of a greater, overall action plan for the project.

* What needs to be done?
* Who will do it?
* What resources are required?
* What support is needed?
* When will it be done? What is the time frame?
* What are key decision points/important milestones?

Once all of the actions are laid out for the group, they should be tested for possible pitfalls:

* Are any of the actions dependent on each other, and in what sequence should they occur?
* Do all of the partners agree to the roles and responsibilities as set out in the action plan?
* Are all of the partners still confident that they can commit the time that is needed to achieve the goals of this partnership, now that the timing and actions have been laid out?
* What happens to this plan if one or more partner cannot continue?
* Do we have the resources that we need to undertake this task? If not, what are some alternatives?
* Is this the best course of action to meet the goals of the partnership? Are there other options we have not considered?

**Ensuring You Have the Capacity to Support the Implementation of Your Partnership Project**

In **Section 3**, we presented the skills and attitudes which are essential to developing and maintaining effective partnerships and how the collective skills, resources and time of the partners should be pooled where necessary to achieve the partnership goals. However, it is not expected that the partners should have all of the pieces of the puzzle immediately. In most cases, even with the most qualified and committed of partnerships, capacity gaps will persist.

While developing an action plan, partners should re-assess their capacity-building needs and identify strategies for addressing them by:

* Understanding and assessing the skills, knowledge and attitudes required to carry out the plan, role or action;
* Identifying the gaps;
* Developing strategies for filling the gaps;
* Developing strategies to support individuals; and
* Learning to apply new skills and knowledge.

Should you identify gaps in capacity, please consider the strategies presented in **Section 3** to help partners develop the necessary skills and attitudes to support the partnership project.

**Implementing the Action Plan and Managing the Partnership**

Once your plan is developed, you are ready to implement and deliver your partnership project as well as manage your partnership. At this point, partners are ready to get down to business and take action in-line with the plan. This step marks a significant transition from a focus on partnership building to project development and implementation. Some partners will feel more at ease with this phase because they appreciate working on practical tasks. Others may feel apprehensive and think that additional planning is required to move the partnership from talk to action.

**In implementing your project, here a few tips to remember:**

Focus on the task

The most successful partnerships are those that are focussed on tasks to be accomplished. In **Section 4**, we underlined the importance of identifying a project leader, whether it’s a person or an organization, which will manage the project’s implementation, coordinate and ensure that things are moving forward as planned. The project leader needs to have an overview of the delivery process and ensure that project staff and partners are fulfilling their commitments well and on time.

Communicate and meet regularly

Remember that communication is key, especially when partners don’t see each other often or are working together virtually. Sharing information and keeping lines of communication open will assist in demonstrating commitment, and building trust, two critical ingredients for keeping the momentum going and ensuring success.

Manage meetings

Meetings easily become repetitive and unproductive if they are not highly focussed and well-managed. Preparing agendas and sharing them ahead of time will help to keep partners on track. Keeping to the agenda, allocating tasks and keeping track of action items will help to keep participants focussed. Providing opportunities at meetings to discuss issues or concerns can help partners feel involve and concerned about the success of the partnership project.

Record and Document

Writing minutes, which will be shared with all partners after each meeting, and assigning tasks on action items will assist in keeping the partners focussed on the end goal. This is also helpful if various members from an organization are involved at different stages of the partnership or in the case of staff turnover. Recording and documenting all the work, work results, special events, decisions about changes, implementation of changes, etc. will also assist in analysing and explaining success and challenges.

Flexibility

Be responsive and adaptable to timelines and to the labour market.

Recognition

Recognizing and acknowledging publicly the participation and contribution of partners, for example by including their company information and logos at events, can also contribute to the success of the partnership project. Don’t hesitate to celebrate or recognize achievements, even small ones, and share success stories.

Reviewing the Plan

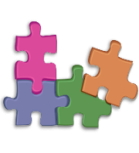
Review your plan on a regular basis in order to stay on track and make adjustments if need be.

**Tips to Remember**

* A vision and goals are not enough to sustain a partnership over time. Concrete action plans that outline how each goal is to be achieved are needed. The vision, goals and action plans should be consolidated into one document. This document should be used as the key tool for managing the partnership and ensuring that it produces results.
* Prepare, keep it simple, be organized, and set timelines and expectations for ending / finalizing the partnership.
* In partnership arrangements there are almost always costs, resulting in the need for revenue. Sufficient funds should be in place. If they are not, a plan to acquire them needs to be developed.
* Remember that partnerships involve a variety of interests and concerns so debate and/or conflict are often part of the partnership process. Be sure to build capacity to make good decisions and resolve conflict. Conflicts resolution and problem solving techniques are discussed in **Section 7.**
* Sometimes we fail to identify and build on capacity because it seems to be an intimidating experience and a somewhat complex task. Be sure to take a developmental approach to capacity building, linking it to the vision, goals and action plans of the partnership.

**ASETS**

Specifics



Key actions identified in your action plan can be used to prepare the Partnership Activities section of your AOP.

[](#_Developing_an_Action_2)We have provided several tools to help support the learning concepts introduced in this section. These tools titled “*Developing an Action Plan” and “Action Plan Template”* can be found at the end of the handbook in the Tools Section on pages 76-77 or by clicking on the tool symbol to the left. For additional action plan resources, please consult the Resources Section at the end of the handbook.

# SECTION 6

# Monitoring and Measuring

Monitoring and measuring are often seen as steps that are taken after a (partnership) project is concluded in order to determine whether the project was successful overall. However, there is greater value in monitoring progress of partnership activities as they are developed to help ensure that they lead to intended partnership goals. This will help the partners ensure that the partnership is on track to meet its goals and will identify and enable any course correction required at an earlier point.

Monitoring and Measuring

This is important and necessary; however, it is also important to monitor the progress of the partnership activities that are intended to contribute to the partnership goals as they are implemented.

Ongoing monitoring and measuring of the partnership will also allow each of the partners to report the ongoing progress of the partnership to their authorities or constituents, which will

bring value to the partnership and will assure investors that their investments are achieving results. However, monitoring and measuring should not simply occur to respond to investors requirements but instead because they provide helpful management information. If you don’t assess how well you are doing towards achieving your goals, you may use resources for the wrong activities and end up not meeting your goals.

**Through monitoring and measuring, you can:**

* Review progress;
* Identify problems in planning and/or implementation; and,
* Make adjustments so that you are more likely to achieve your goals.

**Partnership Monitoring and Measuring Under the ASETS**

As was discussed in the introduction to the handbook, the ASETS focuses on three strategic priorities for the delivery of Aboriginal labour market training: demand-driven skills development, partnerships, and accountability. In your organization’s five-year Strategic Business Plan (SBP), all three priorities were identified and addressed, together with short-term, medium-term, and long-term goals. It is our hope that as you worked through this handbook, it helped provide you with concrete knowledge and tools to develop and implement partnership projects in support of these goals.

If this is the case, at this stage of the partnership cycle, you have developed partnerships projects with private and public sector employers, training providers, community leaders and educational institutions that are not only supporting clients to meet their training and employment needs but that are also demand-driven. As these partnerships are occurring under the ASETS, it is critical to accurately capture and report on the successes and results.

There are a number of mechanisms in place for you to report on your partnership activities and results. The Annual Report (due every July), which enables you to report on formal partnership activities successes and challenges, is one of them. The Mid-Year Dialogue (MYD), which takes place each fiscal year in the third financial quarter, is another occasion to describe your partnership activities, successes and challenges. These tools should be used in combination with any of your organizations tools and reporting mechanisms/requirements.

The process and tools described in this section can help you capture and report on partnerships successes, challenges, and results. But their primary use should be to help you assess how well the partnership is doing in progressing to meet your goals, whether it is working efficiently and whether improvements can be made.

This section is by no means a comprehensive monitoring and measuring guide. It is meant to discuss the concepts of monitoring and measuring within the context of partnerships. It provides a brief description of these concepts as well as an overview of the processes involved. For additional information on monitoring and measuring, you can consult the Resources section at the end of this document or talk to your regional Service Canada official.

**What Are Monitoring and Measuring?**

**Monitoring** is the collection and analysis of information as the project progresses. It is a tool to examine current results and can be used to improve the efficiency and effectiveness of your partnership project. It also allows you to keep your partnership on track and determine what adjustments to your project are necessary. Finally, it provides information to assist with the measurement of results associated with your partnership.

**Measuring** occurs when you compare what you have done or achieved to what you have planned. There are two types of evaluations: formative and summative. Formative evaluation help you assess how the project is doing as it’s progressing. It is a useful tool to help you make adjustments and improve your project. Summative evaluation occurs at the end of a project and helps to identify lessons learned.

Together, monitoring and measuring can tell you if you were **efficient** in implementing and delivering your project (i.e. did what you put into your project, be it time, money or staff to produce appropriate outputs); if you were **effective** (i.e. did you achieve what you set out to achieve), and if you had an **impact** (i.e. did you make a difference to the problem you were trying to address).

In light of this, it becomes evident that proper planning is vital to monitoring and measuring. After all, you can only compare what you did; how you did it and what the result is with what you projected would happen. Your plan becomes what you can refer back to. In addition, partnerships are said to be most successful when the partners are able to define success and progress.

**The Process of Monitoring and Measuring**

What does a successful partnership look like? What will you measure to ensure that you have achieved this definition of success? And how will your organization do this?

**Step 1 - Establish indicators**

The first step is to determine indicators, i.e. what you want to know and the kinds of information you should collect to answer your questions. Indicators can relate to structure, processes or outcomes/impact. They are tangible and measurable signs that something has been done or that something has been achieved. You should set your indicators by determining what signs would serve as proof that:

* the vision has been achieved (outcomes or impact indicators);
* the activities supported the achievement of the project goals (effectiveness indicators);
* it was done the way you wanted it to be done (process indicators); and
* the use of resources was conducive to the realization of optimal results (efficiency indicators).

Keep in mind that each partner may have its own monitoring, evaluation and reporting requirements that will need to be built into the project monitoring and measuring plan. Data and documentation may need to be developed and maintained in order to meet these requirements, and this could have an impact on the way the project is implemented (for example, it could have an influence on the information collected from each client). Therefore it is important to discuss these requirements openly among the partners prior to embarking on the project.

In **Section 4** - *Creating Partnership Infrastructure*, we introduced a tool called a SWOT Analysis. A SWOT Analysis can also be a useful tool to review your project. As mentioned previously, a SWOT Analysis is a method to identify the Strengths and Weaknesses as well as the Opportunities and Threats of your project. A SWOT Analysis could help you to uncover new opportunities, for which your partnership is well positioned. Understanding the weaknesses of your partnership project could help you to manage and eliminate threats. When establishing indicators to monitor and measure your partnership project, think of what questions you may want answered in relation to your SWOT Analysis. This can also assist in revising your project to better meet your goals.

**Step 2 - Set-up a plan for collecting information as it relates to the indicators**

The best way to stay on track with partnership monitoring and measuring is to have a plan that will help guide monitoring and measuring from start to finish. Planning should be an activity that is performed before implementation so that you have a vision of your ultimate goal and the steps that you intend to take to get you there.

A separate column could be added to your action plan or a detailed worksheet could be developed on its own. A data collection plan template has been included in the Tools section.

The information you collect should have value. Make sure that all information you collect is used and try to keep reporting requirements simple, that way you are not overloading anyone with your data collection.

Determine how often you will collect and analyse this information so that it lines up with your indicators and to ensure that it is available for your management of the partnership.

* What have you achieved during this period?
* What do you want to achieve over the next period?
* What adjustments need to be made over the next period?

**Step 3 - Collect the information**

You can use action or work plans, reports, meetings records, attendance records, clients records, financial statements, capacity building plans, uploads to the Data Gateway, etc. that are part of your regular work as a source of monitoring and measuring information.

You may also want to consider additional modes of data collection such as: questionnaires, key informant interviews, focus groups, recorded observations, file reviews, etc.

As mentioned previously, collect the information as the project progresses around the questions you want answered. Make it part of your routine. Remember to collect baseline information so that you have a measure for comparison. Baseline information is what you know about a situation when you begin a project. Finally, decide where you will store the information in an accessible way until you are ready to analyse it.

**Step 4 - Analyse the information**

Now that you have collected all the information relevant to your indicators, you will need to decide how to make sense of it. When you are analysing the information, you will compare your observations or results to the expected indicator to see if there are any variation. If so, you should try to determine why that is and if there is anything you could do differently to achieve the expected indicator. This process is illustrated below:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Expected Results** | **Actual result** | **Variation** | | **Factors that influenced results** | **Adjustment required?** |
| At least 80% of clients will have improved their work skills. | 65% of clients improved their work skills. | 15% fewer clients than expected improved their work skills. | In reviewing attendance sheets and client files, project coordinators realised that motivation to attend class was low and therefore negatively impacted attendance. | | Examine why motivation was low and consider providing specific rewards to help promote attendance. |

Remember to assess progress towards what you want to achieve and not just the end results.

Look at the bigger picture! Are there common themes or trends coming out? Once you have identified themes or trends, you can structure your information in an organised way and reflect on lessons you may have learn along the way. The next step is to write your analysis and make recommendations for adjustments.

**Step 5 - Use the information**

Now is the time to put your data collection and analysis into action! You can use your recommendations to inform daily project management and adjust activities. If your project is not progressing according to plan, fix the problem or make the necessary revisions to improve your plan.

Come up with a list of possible options to take action based on your findings. Discuss with stakeholders and implement. Then monitor and measure these new actions.

Lastly, don’t forget to use the findings to report to stakeholders and investors as well as to promote the partnership.

**Tips to Remember**

* Be sure there is a clear understanding of what success looks like and the necessary steps to create a concrete way to measure this over time, from the beginning of the project to the end.
* Assess the effectiveness of your partnership structure and process on a regular basis. Remember to take the pulse of your rapport on a regular basis. You should assess how well your collaborative process is working and be able to identify how to make the process better. After all, the relationship is the fuel that will feed the success of your partnership so take the appropriate steps to make it last.
* Remember to take the pulse of your rapport on a regular basis. You should assess how well your collaborative process is working and be able to identify how to make the process better. After all, the relationship is the fuel that will feed the success of your partnership so take the appropriate steps to make it last.

[](#_12._Sample_Data_1)A data collection plan template has been included to assist you in planning the monitoring and measuring of your partnership project. You can use this template or come up with your own. The template can be found at the end of the handbook in the Tools Section on page 78 or by clicking on the tool symbol. For additional monitoring and measuring resources, including reference to a tool measuring the partnership’s collaborative process, please consult the Resources Section at the end of the handbook.

# SECTION 7

# Troubleshooting

Even if a partnership is strong, the partners may run into issues or challenges. It is important to have some strategies to address these challenges. Below are some examples of partnership challenges along with some techniques to help mitigate the impacts. Remember that issues or challenges can arise at any point during the partnership. The list included in this handbook is not meant to be exhaustive. We simply wanted to highlight the most common issues and remind you that the problem solving techniques discussed later in the section can assist in identifying the problem and finding solutions for some issues you may encounter.

Troubleshooting

**The Importance of Motivation**

Partnerships require a significant amount of energy. It is important for partners to find ways to keep momentum going for the project. This can be achieved by reporting on successes, renewing commitment to the project, and discussing challenges openly.

**Partners Lack the Time Required for a Successful Partnership**

Given the competing priorities of partners it may occur that certain partners may not have the time to devote to a project that they thought they had at the outset. This can be frustrating for other partners and may also slow the progress of the partnership. When this occurs, it is important for partners to be honest about what is occurring. Partners who lack the time to

devote to the project should be open about the issues that they are facing. Conversely, other partners should be honest about how this is affecting the partnership overall. Is this a

short-term issue or will it be an issue throughout the implementation of the partnership? Is

there another partner that can assist and take on some of the responsibilities of the partner? What impact is this having on the project as a whole?

**Partners Reach an Impasse**

Partners will not always agree on all issues. Conflict resolution strategies are included in the **Tools Section** and can be employed to try to reach a solution to the impasse.

**A Partner Can no Longer Participate**

There are some unfortunate instances where a partner may no longer be able to participate in the project. This can occur when there are structural, financial or organizational changes within an organization. Sometimes this is inevitable; however, it will be important for the remaining partners to discuss the impact the loss of a partner will have on the partnership and its results, and to begin to broker solutions. Is there another partner that could be brought on board to fill the gap of this partner? Do we need to adjust our results or goals to account for this loss? Will this affect our timelines? How will we adjust our work plan? Does this have an immediate impact on our clients?

**Lack of Resources**

Partners may realize that the amount of funding originally devoted to the project is insufficient, or that an organization can no longer contribute to the level expected. In this case, similar questions will need to be asked and the project may need to be adjusted to account for this issue. It is important to note that most partners will need to report any changes to the work plan, goals or vision that will impact the overall results of the project or how the money is spent.

**Problem Solving**

Regardless of what type of issue or challenge you encounter, applying a problem solving technique can assist you in resolving the situation at hand. The ability to identify a problem, evaluate all of the relevant factors and develop a good solution is essential when you are involved in a partnership. A problem solving technique typically entails four steps:

Step 1 - What is the problem?

* What are the symptoms of the problem?
* What is the root cause of the problem?

Step 2 - What are the potential solutions?

* Are there any factors that you need to consider when choosing a solution (e.g. policies, procedures, etc.)?
* What are the advantages and disadvantages of each possible solution?
* What are the consequences of each possible solution?

Step 3 - What is the best solution?

* Which solution is the best overall? Why?

Step 4 - Is the problem solved?

* Did the chosen solution solve the problem? If not return to step 1 to review the problem again. Try using a different approach.

You can apply these steps as a group or on your own. If you decide to apply them on your own, don’t hesitate to ask for feedback.

Make sure that you understand the problem. Do not rush into the problem solving process before you understand the different aspects of the issue.

Finally, remember to keep track of issues you encountered and how these may have impacted your partnership project as well as how you were able to solve the problem. This will not only help inform the monitoring and measuring (see **Section 6**) of your partnership project but can also help you face similar problems in the future.

**Tips to Remember**

* All partnerships have some difficulties along the way. How these difficulties are handled is as important as the solutions that are found.
* Healthy partnerships can handle an amazing number of problems and much stress, whereas unhealthy ones can dissolve over what might seem like a fairly insignificant difficulty.
* Knowing the possible issues in advance can help prevent some problems and help devise solutions when and if they do occur.
* Some difficulties that partnerships encounter require well-trained professional assistance. Wise partnerships determine when to handle things themselves and when to call in an expert.

[](#_Sample_Data_Collection)At the end of the handbook we have included a few tools titled “Motivational Factors and Strategies”, Problem Solving Log and Worksheet and Conflict Resolution Strategies starting on page 79 that can help when you experience issues or problems in a partnership. You can quickly access these tools by clicking on the tool symbol to the left.

# SECTION 8

# Revising and Adapting

**Revising and Adapting**

If the partnership model contained within this handbook is followed, the partners will be reviewing and evaluating their successes and challenges throughout the partnership. As a result of monitoring and assessing progress, the partners may need to revise the work plan as they discover what is working well and what has not been successful throughout the partnership. They may also need to adapt the project to meet the demands created by new economic conditions or so that it may be implemented in another community or with another target group.

Revising and Adapting

**Revising Your Action Plan**

If the information collected through your monitoring and measuring activities indicate that the action plan is not conducive to the achievement of your partnership goals or that the activities could be done differently to improve the efficiency or effectiveness or your partnership project, you will need to revise your plan.

Revision is perfectly acceptable and will likely lead to better results as it is responsive to the current situation and to change. However revision should be transparent and well

communicated among and within the partners to avoid any unintended consequences. This

can be done by preparing a report on findings and recommendations from your monitoring

and measuring activities or by doing a presentation at your next partners meeting.

* What can be done differently to meet the goal?
* Who will do it this time around?
* Are new resources required? What are they?
* Is support needed to implement this new activity?
* When will it be done? What is the time frame?
* What are key decision points/important milestones?

Once your new plan is laid out, think also about how you will monitor and measure these new activities and outputs. Do you need new indicators? New data collection methods? Don’t hesitate to consult once more **Section 6** to assist you with the monitoring and measuring of your new action plan. You are now ready to implement your new plan!

**Adapting Your Partnership Project**

Adapting the partnership means expanding or changing the partnership as new goals arise. You can expand your partnership project either by incorporating new partners, adding on new activities, implementing it in a new community, targeting a new group (for example, women instead of youth) or by supporting other groups in creating similar initiatives.

If this is the case, partners are encouraged to go back to the beginning of the partnership cycle, thinking about implications at each phase: are new partners required to support the achievement of the new goals? Who will take the lead? What actions will be undertaken to achieve the new goals? Who will be responsible for implementing these new activities?

**Tips to Remember**

* Action plans must be reviewed, revised or replaced if they are not producing the results for which you had hoped.
* Remember partnerships operate in a dynamic environment. Make sure you are aware of changes within your environment and that you confirm that your goals and action plans remain relevant and meaningful.

# SECTION 9

# Moving On

**Moving On**

Moving On

Here we are at the last step of the partnership cycle: moving on. At this point, the partnership project has been concluded and partners are faced with various options on how to approach the future. They can bring closure to their partnership; they can continue their partnership and secure long-term delivery mechanisms; they can find new ways of working together; or they can find new partners with who to work.

**Closure**

There are two reasons to close a partnership: a closure may occur when the project is completed successfully, or if, for some reason, the partners have evaluated the progress and success of the partnership and have decided not to continue.

**Positive Completion of the Project**

In the case of a positive completion of a project, the closure of the project should be

celebrated. The collective success of the partners, as well as the success of their clients,

should be discussed and celebrated as well. It is important to recognize the support partners have provided and how this contributed to the success of the project. This may help to

maintain their commitment to the partnership project. Recognizing a partner’s support can be done in various ways, such as including their company logo at events or on brochures and reports; organizing a graduation ceremony for clients and inviting partners to attend; taking the opportunity to acknowledge their support at the same time; or sending a thank you letter or certificate or recognition. Examples of letters and certificates have been included in the **Tools Section**.

When a project has been successfully completed, partners should also discuss next steps: is there a chance to partner again? What are some future partnership ideas? What did we learn from this partnership that we would, and would not, like to repeat? Monitoring and measuring activities conducted throughout the partnership project will help inform discussions around

next steps.

**Partners Decide to End the Partnership Project**

Before partners decide to terminate the partnership, they should discuss the situation and ensure that everyone is comfortable with the closure of the partnership. The discussion should focus on: what led to this occurring? Is there anything we can do? Do organizations need to have invested funds returned to them? Do we need to report this occurrence to our internal authorities? Should we complete a final report on the partnership? What could have changed the outcomes? Conducting an assessment of the partnership project can also assist in gaining a better understanding of the factors that may have hindered the success of the partnership project. In the [**Tools Section**](#_Closure_Checklist_1) you will find a closure checklist on page 84 that you can use when a partnership is being terminated.

**Maintaining the Partnership**

If partners agree to continue their partnership relationship, they will need not only to renew their commitment to the partnership but also put in place measures to ensure project’s sustainability.

**Renewal of Commitment**

Partners will need to put efforts to securing greater commitment. At this point and based on the success of the collaboration or partnership, partner organisations may consider formalising their partnership arrangement if that has not been done already.

**Sustainability**

One of the biggest challenges to partnership sustainability is the issue of long-term funding. Funding and comprehensive financing, for large-scale or even smaller initiatives, can be difficult for several reasons including: short-term and low-risk approaches to loans and contribution funding by funders; confusing and changing eligibility criteria of government programs; limited ability of organizations to match funds or make down payments; and, poorly-written funding requests or project plans[[7]](#footnote-7).

Although there is little you can do about how funders decide to allocate funding there are still some issues under your control. One solution is thinking of long-term funding as a goal requiring its own action plan and dedicated human resources.

**Changing Partners**

Finally, there may be some situations where either one of the partners wishes to withdraw from the project while the other one wants to continue. Or, both partners want to carry on with the partnership project but require additional support as a result of new goals and activities. This should be approached in the same way as laid out in **Section 2** – *Identifying and Approaching Partners*. Partners should then move along the partnership cycle to revise their assessment of climate and skills, their partnership infrastructure, their action plan and their monitoring and measuring plan.

**Tips to Remember**

* New people and ideas should always be welcomed, and partnerships should make an effort to have a way for people to join. Changes in the personalities involved in the partnership will change the dynamics of the group.
* Partners, both individually and collectively, should plan a ‘moving on’ strategy - possibly from the very beginning. This strategy should form part of the partnering agreement.
* When a partnership ends for whatever reason it is important for all those involved to recognize and celebrate achievements, big or small.

[](#_Closure_Checklist)At the end of this document you will find a number of tools that can assist in closing a partnership or moving on. These tools include a “*Closure Checklist*”, and sample “*Thank you Letter*” and “*Recognition Certificate*” starting on page 84. Finally, a “*Partnership Recap Checklist”* has also been included to help you ensure you have taken all the proper steps to establish and maintain your partnerships. The tools can be found by clicking on the tool symbol above or by consulting the **Tools Section**.

# Conclusion

This Handbook was developed to support ASETS agreement holders in planning, developing, and maintaining effective and sustainable partnerships. Partnerships have been an integral part of Aboriginal labour market programming for years. Moreover, ASETS, established in 2010, emphasizes the fostering of partnerships with the private sector and the provinces and territories as one of its three strategic priorities.

By working with partners, ASETS agreement holders can leverage programs and increase outcomes for clients. They can ensure that programs are complementary and they can fill local employment gaps. ASETS agreement holders can develop partnerships projects with private and public sector employers, training providers, community leaders, and educational institutions that are both demand-driven and support clients to meet their training and employment needs.

It is our hope that the handbook has provided some useful knowledge and tools that can help individuals and organizations achieve their partnership goals.

We would like to end by thanking all those that made this handbook possible. Aboriginal Agreement holders provided invaluable insight into the current state of partnerships during the inaugural Mid-Year Dialogues; SC regional business expertise consultants along with NHQ staff participated in 6 training modules including reading and completing exercises while providing feedback and comments helping to mold the final product; and not to forget the work that was done before us for which this document owes much - Flo Frank and Anne Smith for their publication of the Partnership Handbook for HRDC in 2000.

Good luck in all your partnership endeavours!

# Partnership Tools

In order to help support the information provided in the ASETS Partnership Development Handbook we have incorporated a number of learning tools. Some of the tools are original and others are borrowed.

As we move forward, we will continue to search for more creative and meaningful tools that can be added to this section. With this in mind, we encourage all those that use this handbook to share tools that may be beneficial to agreement holders in the creation and maintenance of effective partnerships.

Here is a current list of the tools included:

[1. Partnership and Working Relationships Checklist 53](#_Toc402344231)

[2. Partner Assessment Tool 54](#_Toc402344232)

[3. Sample Introduction Letter 55](#_Toc402344233)

[4. Sample Presentations to Potential Partners 56](#_Toc402344234)

[5. Questions and Answers for Potential Partners of ASETS agreement holders 57](#_Toc402344235)

[6. Assessing Strengths and Challenges 59](#_Toc402344236)

[7. SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis Questions 60](#_Toc402344237)

[8. Sample Group Charter 61](#_Toc402344238)

[9. Sample Partnership Agreement Tools 63](#_Toc402344239)

[10. Developing an Action Plan 76](#_Toc402344240)

[11. Action Plan Template 77](#_Toc402344241)

[12. Sample Data Collection Plan 78](#_Toc402344242)

[13. Motivational Factors and Strategies 79](#_Toc402344243)

[14. Problem Solving Log 80](#_Toc402344244)

[15. Problem Solving Worksheet 81](#_Toc402344245)

[16. Conflict Resolution Strategies 82](#_Toc402344246)

[17. Closure Checklist 84](#_Toc402344247)

[18. Sample Recognition Letter 85](#_Toc402344248)

[19. Certificate of Recognition 86](#_Toc402344249)

[20. Partnership Recap Checklist 87](#_Toc402344250)

## 1. Partnership and Working Relationships Checklist

Below is a checklist of the elements potential partners should consider both before and during the time they work together and form partnerships.

Using an example of a work relationship or partnership, circle YES or NO to the statements that best describe the situation.

|  |  |
| --- | --- |
| 1. Have the parties agreed to share the risk, responsibilities, consequences and rewards of the partnership? | YES or NO |
| 1. Is there an equal share of risk and responsibility? | YES or NO |
| 1. Have the parties agreed to a common goal and does working together help them achieve this goal? | YES or NO |
| 1. Do any parties have hidden motivations? | YES or NO |
| 1. Does one party hold all the power? | YES or NO |
| 1. Do the parties seem to be doing more for less because of the partnership? | YES or NO |
| 1. Are the two parties integrating ideas, activities and goals? | YES or NO |
| 1. Have new solutions been found to complex issues based on the coming together of two parties? | YES or NO |
| 1. Can change (e.g. staff turnover, money) easily impact the goals of the two parties? | YES or NO |
| 1. Could the same goals be met individually without having to spend the time managing a partnership? | YES or NO |
| 1. Do you think that your working relationship qualifies as a partnership? | YES or NO |

## 2. Partner Assessment Tool

This tool is meant to assist you in finding as much information as possible on potential partners prior to deciding on embarking into a relationship. Answers to the questions can be found by looking at potential partners’ websites, reading their annual reports, visiting their main office to ask questions and/or asking others who know of the organizations’ history for their views. In some instances, additional follow-up with the potential partners’ representatives will be required, such as a face-to-face meeting or a phone call, in order the get the information required.

The tool can help you not only in making appropriate decisions in regards to a partnership but also to make a stronger case for a potential partnership with these organizations.

| **Assessment Questions** | **Findings** | **Follow-up Required** |
| --- | --- | --- |
| Does the potential partner have a good track record? |  |  |
| What is the potential partner’s mandate and goal? Is it similar or complementary to yours? |  |  |
| Could the potential partner benefit from collaborating with your organization? Is so, how? |  |  |
| Can the potential partner contribute knowledge, experience or resources to the project? |  |  |
| Does the potential partner have any upcoming opportunities (e.g. opening of a store or plant, investments in a particular sector) to which you could contribute? |  |  |
| Does the potential partner have a wide range of contacts they are willing to share? |  |  |
| Is the potential partner well-respected in the community? |  |  |
| Does the potential partner have a good financial record? |  |  |
| Does the potential partner have good management practices and a sound governance structure? |  |  |
| Does the potential partner have complementary skills and competencies? |  |  |
| Does the potential partner have experience in working with Aboriginal people? |  |  |
| Does the potential partner have experience in developing and implementing projects in partnership with Aboriginal groups or in Aboriginal communities? |  |  |
| Does the potential partner have stability among its employees? |  |  |

## 3. Sample Introduction Letter

This letter can be used to contact potential partners and to propose the likely benefits of partnering with your organization.

Dear Sir/Madam:

I would like to take this opportunity to introduce you to our organization, (*include the name of your organization here*). We are an Aboriginal organization specializing in providing training and employment services to (*First Nations, Inuit, Métis - specify*) people in the (*include name of your geographic region here*).

Such services include employment counselling, job-matching, skills development, work experience placements, and many other options for clients.

We also offer services for employers, including:

* Providing targeted training for our clients to meet your employment needs;
* Providing wage-subsidies to assist your company or organization in hiring an Aboriginal employee;
* Matching skilled candidates to your current vacancies; and
* Collaborating with you to build tailored training-to-employment strategies that assist you in filling current and future employment needs.

We would like to meet with you to discuss possibilities for future collaboration with your organization in the near future. It is our belief that a collaborative partnership could prove successful and mutually beneficial.

A representative from (*include the name of your organization here*) will soon contact you by telephone to discuss these possibilities and to hopefully set up a meeting to discuss these ideas in person.

We admire your (*involvement in the community, success in building the … market in our region, approach to human resources, etc. – include statement that best applies*) and look forward to meeting you.

Sincerely,

## 4. Sample Presentations to Potential Partners

Two sample presentations are available for you to adapt and use when meeting with potential partners (simply double click inside the orange rectangle to open the presentations. Press Esc to return to the handbook)

* The first presentation is intended for private sector and industry partners.



* The second presentation is intended for provincial or territorial partners.



These sample presentations are also available as separate files.

## 

## 5. Questions and Answers for Potential Partners of ASETS agreement holders

Where can I learn more about ASETS? <http://www.esdc.gc.ca/eng/jobs/aboriginal/index.shtml>

**What is the Aboriginal Skills and Employment Training Strategy (ASETS)?**

ASETS is a Government of Canada-funded program which provides funding to Aboriginal organizations. Funded organizations provide programs and services to Aboriginal clients and employers in order to assist Aboriginal people prepare for, find, and maintain employment.

**What kind of programs and services to ASETS agreement holders provide to clients?**

ASETS agreement holders provide Aboriginal people with the following programs and services, among others:

* Client skills and needs assessments;
* Employment counselling;
* Job-search tools and information, including access to computers, providing labour market information, and sharing information on emerging careers and training programs;
* Assistance with resume-writing and interview skills;
* Providing clients with funding for training programs and courses that will assist them in finding employment;
* Assisting clients in overcoming barriers they may be facing in obtaining employment, such as transportation, child care and living allowances, among others;
* Helping clients to gain employment experience through work placements and short-term employment;
* Helping clients to retain their jobs by providing them with ongoing support, mentoring and counselling, and liaising with employers; and
* Putting clients in contact with employers and helping them to market their skills.

**What kind of programs and services do ASETS agreement holders provide to employers?**

* Providing employers with access to skilled, motivated employees;
* Matching client skills to employer needs;
* Providing assistance to both client and employer to ensure a successful transition to employment and better ensure retention;
* Assisting employers with integrating Aboriginal people into the workforce, to break down stereotypes, and to build a supportive environment for everyone involved;
* Working with employers to determine their needs, current and future vacancies, and tailoring client training to meet those needs;
* Assisting employers with hiring Aboriginal clients by providing short-term wage subsidies;
* Providing ongoing support to clients and employers to ensure a successful job-match and increase the potential for long-term retention; and
* Working with employers to build unique training curriculum and strategies to meet specific employment needs, when significant Aboriginal employment opportunities are present.

**What are the advantages to partnering with ASETS agreement holders?**

* ASETS agreement holders are experts providing employment counselling, identifying the skills of potential employees and determining training needs;
* Partnering with ASETS agreement holders provides employers with significant funding leveraging opportunities. ASETS agreement holders can contribute to the training and short-term employment of Aboriginal people, providing employers access to trained Aboriginal people for minimal investment;
* ASETS agreement holders can also ensure that this investment is sound. By providing clients with ongoing support and mentoring, concerns and challenges can be quickly addressed, contributing to increased retention rates;
* ASETS agreement holders are experts in finding and designing training strategies. They can assist employers in building training strategies that meet the specific needs of employers; and
* ASETS agreement holders are experts in working with Aboriginal employees and employers hiring Aboriginal people. They can assist you with any transition challenges or concerns you may have in a manner that is both sensitive and professional.

**How can I partner with an ASETS agreement holder?**

Contact your local ASETS agreement holder. They will meet with you regarding your employment needs and explain to you in more detail the skills of their current clients, training options for meeting your specific needs, and ways that you can partner together to meet both the needs of clients and the needs of your organization in meeting your short-, medium- and long-term employment goals.

**What are the advantages of employing Aboriginal people?**

Aboriginal people are Canada’s fastest-growing and youngest population. In the meantime, the general Canadian population is aging, creating significant labour market challenges. Hiring Aboriginal people is an opportunity to address some of these challenges by engaging local people, while also increasing diversity in your workplace and engaging a new community your organization may not have worked with before.

## 6. Assessing Strengths and Challenges

We all have some skills that we are better at than others when it comes to partnership building. Most likely none of us can claim to be great at all these skills! Understanding the skills required will help individuals and organisations assess where they stand as they move forward in the rewarding and challenging partnership development process.

For each skill, specify whether individually or as a group, you possess these essential partnering skills.

|  |  |  |  |
| --- | --- | --- | --- |
| **Skills for Building Partnerships** | **Great at it** | **Ok at it** | **Needs Improvement** |
| Management Skills |  |  |  |
| Negotiation Skills |  |  |  |
| Group Processes and Team Building |  |  |  |
| Planning Skills |  |  |  |
| Evaluation Skills |  |  |  |
| Problem Solving and Conflict Resolution |  |  |  |
| Time Management |  |  |  |
| Financial Management |  |  |  |
| Managing Outside Help |  |  |  |

See **Section 2** for strategies on how to fill the gaps.

## 7. SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis Questions

**STRENGTHS:**

* What are your organizational or project assets?
* Which asset is strongest?
* What differentiates you from other ASETS agreement holders or partnerships?
* Do you have immensely talented people on your staff?
* Do you have a broad client base?

**WEAKNESSES:**

* What areas do you need to improve on?
* What necessary expertise/manpower do you currently lack?
* Are you relying on one partner/funder too much?
* Do you have adequate cash flow to sustain your activities?

**OPPORTUNITIES:**

* What external changes present interesting opportunities?
* What trends might impact nearby industries or businesses?
* Is there talent located elsewhere that you might be able to acquire?
* Is there an unmet need/want that you can fulfill?
* Are there multiple potential partners in your area?

**THREATS:**

* Are key employees working on this project satisfied with their work? Could they be poached by a competitor?
* Do you have to rely on third parties for critical steps in your development process that could possibly derail your delivery schedule?
* What if there is a natural disaster?
* What if your funding is cut?
* What if one of the partners decides to bail from the project?

Source: <http://www.rob-berman.com/questions-to-ask-during-swot-analysis/>

## 8. Sample Group Charter

**ABC Youth Connection and Active Mining and Exploration Group Charter**

**Partnership Purpose**

In partnership with Active Mining and Exploration, ABC Youth Connection will develop and deliver mining and natural resources information training sessions to Aboriginal youth. As part of the training, four employees from ABC Mining and Exploration will volunteer 3 hours each in order to act as guest speakers for a session.

**Duration and Time Commitment**

The duration of the partnership between the above mentioned parties is to be no less than twelve months, with the possibility of an extension of six months. The partners are to meet bi-weekly for 1.5 hours. Four training sessions will be delivered in the first year.

**Communication**

If a participant cannot be present at a bi-weekly meeting, they can participate via teleconference. Meeting minutes along with meeting invitations will be emailed to participants within two days following a meeting. Participants are encouraged to communicate with each other if need be via email, telephone or in person.

**Participants**

ABC Youth Connection – Marla Big Eagle, John Good and Colombe Bernier.

Active Mining and Exploration – Sara Chalmers, Greg Stevenson, Dana Pelltier and Fiona Milton.

**Roles and Responsibilities**

As decided at the first meeting by vote and/or by volunteering:

1. Marla Big Eagle – Secretariat
2. Colombe Bernier and Sara Chalmers – Co-chairs
3. John Good, Greg Stevenson, Dana Pelletier and Fiona Milton – Executive
4. Agendas will be distributed by the secretariat no less than 2 days before the scheduled meeting.
5. An action plan will be drafted with each action requiring unanimous approval by the executive. The approved action plan will be in effect as of the fourth meeting.
6. Conflicts will be resolved by first identifying and documenting the problem followed by using problem solving techniques to move forward. If the executive cannot agree on a solution, a conflict solving actions will be put forward to vote. 4 votes hold a majority.
7. People will be held accountable to the partnership by means of quarterly performance reviews to be held by the executive. If a majority of the executive finds that an executive member is not fulfilling their tasks has laid out in the approved action plan on 3 separate occasions, the executive member will be replaced.
8. New executive members can be nominated. Once nominated, the member will require a unanimous vote of support from the executive.
9. The Group Charter can be updated or altered at any time based on unanimous approval.

**Desired Outcomes**

Through our partnership, quality training sessions in mining and natural resources will be delivered to a maximum of 80 Aboriginal youth over four sessions in 12 months. The participants will gain insight into the employment potential in the mining sector in their region. ABC Mining and Exploration will gain exposure to a fast growing and capable potential local labour market.

**Supporting Resources**

ABC Aboriginal Youth Connection will provide the meeting room and the training space. ABC Mining and Exploration will provide expertise and input to training materials along with 4 staff to act as guest speakers for 4 sessions. ABC Mining and Exploration will also provide a tour for each group on the last day of each training session.

**Evaluation (measuring success)**

At the first meeting after each training session, the partners will evaluate both the success of the partnership as well as the expected outcomes as stated in the charter. The informal evaluation will be posted by the secretariat for review. The participants will need to accept the notes and draft an action plan based on results.

## 9. Sample Partnership Agreement Tools

The following tools will assist potential partners to establish written agreements and arrangements to formalize the partnership and the roles and responsibilities of the partners. You will find below descriptions of each of the partnership arrangements followed by an example of each.

**Memorandum of Understanding (Examples 1A and 1B)**

A memorandum of understanding (MOU) is a legal document describing a bilateral agreement between parties. It expresses a convergence of will between the parties, indicating an intended common line of action, rather than a legal commitment. It is a more formal alternative to a gentlemen’s agreement, but generally lacks the binding power of a contract.

**Partnership Development Agreement (Example 2)**

A partnership development agreement is a document describing the intent of two or more organizations to develop a partnership or partnerships. The agreement discusses the mutual intent and commitment of the parties to develop partnerships and defines the basic rules of engagement, roles and responsibilities but does not require that all of the details are already defined. A Partnership Development Agreement is appropriate for an SPF application, for example, however, this is not the only application of this type of arrangement. This can also be used if you are not sure of the long-term roles and responsibilities or programs, but have mutual commitment to the overall objectives of the partnership. This can also be used to propose the partnership to the senior officials/boards of each of the partnership.)

**Memorandum of Agreement (Example 3)**

A memorandum of agreement (MOA) or cooperative agreement is a document written between parties to cooperatively work together on an agreed upon project or meet an agreed upon objective. The purpose of an MOA is to have a written understanding of the agreement between parties. The MOA can also be a legal document that is binding and hold the parties responsible to their commitment or just a partnership agreement.

**Partnership Letter**

A partnership letter is a letter from one partner to another describing their support for the mutual project as well as committing their contribution to the partnership. Similar to the partnership development agreement, the details do not need to be all ironed out, however the letter should demonstrate a solid commitment and some specificity regarding what the partner will contribute.

**EXAMPLE 1A: MEMORANDUM of UNDERSTANDING**

On the establishment of a partnership between the Partner A and Partner B to foster Aboriginal employment in X industry

* Having regard to the mutual goals of ASETS holder XX and Partner YY to increase Aboriginal employment in the X sector;
* Having regard to the mutual goals of ASETS holder XX and Partner YY to support a professional and well-trained workforce in the X sector;
* Having regard to the goals of ASETS holder XX to assist Aboriginal people to increase their employment skills, expand their opportunities and support their goals.

**A. OBJECTIVES**

* Through the Partnership, ASETS holder XX and Private Company YY will increase Aboriginal employment in the X sector;
* The overall objective of the Partnership is to increase the employment skills of Aboriginal people in the X region, supporting a professional workforce in the X sector.
* The specific objectives are to:
* train X Aboriginal clients in (XX skill) to prepare them for (X position/job) in the XX industry;
* train X Aboriginal clients in (YY skill) to prepare them for (Y position/job) in the XX industry;
* employ X Aboriginal clients in Private Company YY in (X position/job) in the XX industry through a work experience placement;
* employ X Aboriginal clients in Private Company YY in (Y position/job) in the XX industry through a work experience work experience placement;
* employ a minimum of X Aboriginal clients in Private Company YY in (X position/job) through long-term, permanent jobs;
* employ a minimum of Y Aboriginal clients in Private Company YY in (Y position/job) through long-term, permanent jobs.
* The objectives of the Partnership will be achieved through:
* joint development of client curriculum between ASETS holder XX and Private Company YY;
* ongoing client counselling to be provided by ASETS holder XX;
* on-the-job training to be provided by Private Company YY;
* mentorship to be provided by ASETS holder XX and Private Company YY;
* training costs and allowances to be paid by ASETS holder XX;
* job-experience wages to be provided by Partner A (50%) and Partner B (XX company) 50%)
* full time employment for X Aboriginal clients in Private Company YY.

**B. PRINCIPLES AND SCOPE**

* Partnership will be based on the following general principles:
* respect and mutual understanding of the respective strengths, organisational structures, mandates and institutional capacities of both partner organizations;
* reciprocity of action and commitment.
* The partner organizations will discuss issues and challenges and work collaboratively toward mutual solutions in order to achieve the objectives of the partnership.
* The partners will be mutually committed to the success of the clients.

**C. AREAS OF COOPERATION**

* The partners will work together to determine the training needs of the clients in order to fill the skills gaps of Private Company YY.
* The partners will work together to determine viable training options and curriculum (or contracted training programs) for the clients.
* The partners will develop a mentoring and support framework for the clients.

**D. ARRANGEMENTS**

* Within the context of the Partnership, a dialogue between ASETS holder XX and Private Company YY will be developed through regular bilateral meetings, where matters linked to the implementation of the Partnership will be discussed. Senior-level meetings will be held once a year between the partners in order to review the progress of work and discuss policy, technical and operational issues in an effort to further the objectives of the Partnership.
* The focal points/representatives for the partnership will be XX representative from ASETS holder XX and YY representative from Private Company YY.
  + Regular and ad hoc meetings may be held between officials of the two parties, with notification to, and, as much as possible, the participation of, liaison officials; these meetings will cover practical matters of cooperation, in particular the implementation of projects, participation in committees, groups and working parties and the preparation of documents.

**E. FINANCIAL FRAMEWORK**

* Financial contributions of ASETS holder XX will be made in the context of the Guidelines on Eligible Expenditures for ASETS.
* Financial contributions of Private Company YY will be made directly to the clients/to fund client activities and do not have to be transferred to ASETS holder XX.

**F. DURATION**

* The Partnership enters into effect on the date of signature of this

Memorandum and is for a XX-year period. The content of the Partnership is

to be reviewed after XX years.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

XX XXXXX

Board Chair, ASETS holder XX

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

YY YYYYY

Vice President, Private Company YY.

**EXAMPLE1B: Memorandum of Understanding**

The Partnership on XXXX (hereafter referred to as the Partnership) is a multi-stakeholder initiative to build capacity for XXX. Its overall goal is to XXX, which allows XXXX. The Partnership provides a framework for the coordination of activities carried out by the parties toward their mutual goals of XXX.

Partners are understood to be those that have become parties to this Memorandum of Understanding through their signature (hereafter referred to as Partners).

**Article I**

Purpose of the Partnership

1. The Partnership aims to XXX
2. The Partnership, in order to achieve the above objective, has set out to:

**Article II**

Areas of cooperation and contribution by the Partners

Partners will,

1. Partners will regularly contribute to the exchange of experience and discussions with other Partners, and provide feedback on issues relevant to the work of the Partnership.
2. Partners will contribute to the operation of the Partnership through participation in its task groups or in the Partnership Steering Committee.

**Article III**

Steering Committee

To assist in the implementation of activities undertaken in the framework of this Memorandum, the Partners will elect a Steering Committee. The composition, functions and responsibilities of the Partnership Steering Committee are detailed in the Annex to this Memorandum. In case of inconsistency between a provision of this Memorandum and a provision in its Annex, this Memorandum will prevail.

**Article IV**

Financing of Activities

In order to implement the specific activities envisioned hereunder, the Partners will:

* conclude specific activity plans (to be determined as the need arises), which will outline the specific activities agreed upon along with the responsibilities of each Partner, including costs and expenses and how they are borne by the Partners.

The financing of each activity is outlined in the attached budget.

**Article V**

Status of the Memorandum, Partnership and Partners

* This Memorandum will not be deemed or construed to create, or have been intended to create, legally binding obligations between or among the Partners.
* Nothing in this Memorandum will be deemed or construed to create, or have been intended to create, a joint venture, employment or agency relationship between or among the Partners.
* No provision of this Memorandum will be construed so as to in any way interfere with the Partners’ respective decision-making processes with regard to their own respective affairs and operations.

**Article VI**

Entry into force and termination

* This Memorandum will enter into force for each Partner upon signature by that Partner, and provided at least two Partners have signed it.
* A Partner may terminate its adherence to the Partnership by providing a written notice of at least three months to the Steering Committee.
* Without prejudice to paragraph 2 hereof, steps will be taken to ensure that termination will not be prejudicial to any activities, programmes or obligations undertaken or assumed within the framework of the Memorandum, which have commenced prior to the receipt of the notice of termination.

**Article VII**

Dispute Resolution

Any dispute arising from or in connection with this Memorandum including interpretation or application of any provision herein contained will be settled amicably by the Partners.

**Article VIII**

Privileges and Immunities

Nothing in or relating to this Memorandum will be construed as a waiver, express or implied, of any of the privileges and immunities accorded to any Partner hereto by its constituent documents, national or international law.

**Article IX**

Amendments

This Memorandum may be amended by mutual written agreement of all Partners. Unless otherwise agreed, amendments may apply only to activities that have not yet been implemented.

SIGNED:

(LOCATION), (DATE)

\*\*\*

**ANNEX**

Functions and responsibilities of the Steering Committee

**Composition**

The Steering Committee (SC) is comprised of xx Partners, elected by voting within the Partnership, for a two-year term. The criteria and election procedure are to be determined by the Partnership at each election.

**Mandate**

The broad mandate of the SC is to provide a ‘public face’ for the Partnership; provide a range of secretariat functions; coordinate the work programme for the Partnership; initiate and coordinate Partnership activities (including those of task groups); and review applications from potential new members.

The SC will be supported by the other Partners and by individual task groups.

To maximize effectiveness, the SC will have a reasonably high level of decision-making responsibility. This would be coupled with a high degree of accountability to the other Partners and retention of broader decision-making responsibility by the other Partners on major issues such as the strategic direction or large capital expenditures.

**Detailed functions and responsibilities**

The SC will manage the ‘public face’ of the Partnership entity. It will therefore deal with requests for information and assistance (which would include passing requests to other Partners). Its members will also represent the Partnership when required, for instance, at meetings.

The SC will provide a secretariat function for Partnership and other meetings (for instance, with donors or beneficiaries), that is, arrange meetings and prepare agendas and minutes. It will be responsible for making sure that Partnership meetings and communications are sufficiently frequent, cover the relevant issues, and allow all Partners to be heard. Partnership meetings will include face-to-face meetings and phone conferences.

The SC will maintain a repository of relevant Partnership documents and communications. A Partnership web site would be ideal for this purpose. It could possibly have both closed (Partners only) and open (public web site) parts. The web site might be maintained by one of the SC members on behalf of the Partnership.

The SC is empowered to seek donor funding on behalf of the Partnership, taking into account the provisions of Article V of the Partnership's Memorandum of Understanding.

The SC will prepare an annual work programme for the Partnership. This could include major strategies and proposals and will be built around the core objectives of the Partnership. The work programme will be referred to the other Partners for consideration and approval. The SC could also refer proposals by individual Partners (and perhaps entities outside the Partnership).

The SC will be able to initiate tasks and allocate them (for instance, to relevant task groups). The SC will also have a continuing coordination role in respect of such tasks.

The SC will assist the relevant task groups with the production, editing and printing of Partnership publications and other output (with complete ‘late draft’ versions to go to all Partners for their consideration).

In order to fulfill its accountability requirements, the SC will prepare a formal end of year activity report and will share it with all the Partners. The report will include all relevant information on Partnership activities. The formal report would be supplemented by less formal reports such as minutes of meetings.

The SC will coordinate major Partnership events.

SC members may prepare and contribute to technical documents and projects (in the same way as other Partners) depending on their expertise.

Members of the SC may specialize in certain activities (for instance, one entity might undertake secretariat functions, another manage a web site and email address). This is left to the discretion of the SC.

**Example 2: Partnership Development Agreement**

Partnership Development Agreement

Between

Your Organization

And

Partnering Organization

For Application To:

*Specific program, if necessary (for example, SPF)*

This Partnership Development Agreement establishes a type of partnership between your organization and partnering organization.

**I. MISSION**

*Include a brief description of your organization’s mission. You might want to also include a sentence about the specific program if applicable.*

*Include a brief description of the partnering organization’s mission.*

Together, the Parties enter into this MOU to mutually promote describe efforts of the partnership e.g. Aboriginal employment in health careers. Accordingly, your organization and partnering organization, operating under this MOU agree as follows:

**II. PURPOSE AND SCOPE**

Your organization and partnering organization. *Describe the intended results or effects that the organizations hope to achieve, and the area(s) that the specific activities will cover.*

* + 1. Why are the organizations forming a collaboration?
    2. Benefits for the organization?
    3. Who is the target population?
    4. How does the target population benefit?

Include issues of funding if necessary. For example, each organization of this MOU is responsible for its own expenses related to this MOU. There will/will not be an exchange of funds between the parties for tasks associated with this MOU.

**III. RESPONSIBILITIES**

Each party will appoint a person to serve as the official contact and coordinate the activities of each organization in carrying out this MOU. The initial appointees of each organization are:

*List contact persons with address and telephone information*

The organizations agree to the following tasks for this MOU:

Your organization will:

- *list tasks of your organization as bullet points*

Partnering organization will:

- *list tasks of partnering organization as bullet points*

Your organization and partnering organization will:

- *list shared tasks as bullet points*

**IV. TERMS OF UNDERSTANDING**

The term of this agreement is for a period of insert length of MOU, usually 1-3 years from the effective date of this agreement and may be extended upon written mutual agreement. It shall be reviewed at least insert how often, usually annually to ensure that it is fulfilling its purpose and to make any necessary revisions.

Either organization may terminate this partnership development agreement upon thirty (30) days written notice without penalties or liabilities.

Authorization

The signing of this partnership development agreement is not a formal undertaking. It implies that the signatories will strive to reach, to the best of their ability, the objectives stated in the MOU.

On behalf of the organization I represent, I wish to sign this Partnership Development Agreement and contribute to its further development.

Your organization: Partnering Organization:

Name Date Name Date

Title Title

Organization Organization

**Example 3: MEMORANDUM OF AGREEMENT (MOA)**

Memorandum of Agreement

for the ABORIGINAL TOURISM EMPLOYMENT PROMOTION PROJECT between

Partner A, Partner B, Partner C and Partner D a cooperative Agreement involving:

XX community

YY community

ZZ community

XX Tribal Council Department of Community and Economic Development

XX Airline

XX Hotels and Resorts

**WHEREAS,** XX community, YY community and ZZ community enjoy a common heritage and enjoy related and common natural and cultural resources, tourism opportunities, and economic bases; and

**WHEREAS,** XX community, YY community and ZZ community are committed to the preservation and rehabilitation of their natural, cultural, and economic heritage, and are committed to the growth and stabilization of their economic and tourism base while preserving and expanding their cultural heritage;

**WHEREAS,** XX community, YY community and ZZ community are committed to ensuring that members of their communities are able to take advantage of employment opportunities in each of their communities, to build their skills and to build lasting careers for their community members;

**WHEREAS,** XX Tribal Council Department of Community Economic Development, XX airline and XX Hotels and Resorts are committed to building a skilled workforce in the local tourism industry;

**WHEREAS,** XX ASETS holder is committed to building a skilled and qualified workforce in the XX region, and to supporting workers and unemployed citizens of each of the communities throughout their employment journey; and

**WHEREAS,** all of the above noted organizations are committed to the growth of tourism in the XX region and the fostering of local employment and training opportunities as a result of this growth.

**NOW THEREFORE,** the parties agree as follows:

1. The parties hereby agree to . . .

2. That the XX Tourism project shall be governed by a Board/working group/committee consisting of one appointee for each partnering organization.

3. That the Council shall choose a chair from among its members.

4. That the chair may convene such meetings as her or she deems necessary, but not less than four per year.

5. That any member of the partnership can call ad-hoc meetings should they deem it necessary to ensure the ongoing progression of the partnership project.

6. That each partner will provide administrative and technical support to the project, as agreed, to accomplish the purposes of the agreement, and shall supply such other support as needed.

* Community XX will . . .
* Community YY will . . .
* etc.

7. That each partner will provide specific support to the project, as agreed, to accomplish the purpose of the agreement, and will provide other support as needed.

* Community XX will support the tourism industry in the community by . . .
* Airline XX will provide work experience opportunities to XX community members . . .
* Hotel and Resorts XX will provide work experience opportunities to XX community members . . .
* ASETS holder XX will identify appropriate unemployed clients to participate in the project, coordinate training opportunities and provide clients with ongoing counselling and support throughout the project.

**Plans and Strategies**

1. The partners to this project will prepare a strategic plan for implementation of this Agreement that articulates the vision, mission, and organizational structure of this Agreement.

2. Prepare and implement the following specific plans:

1. Tourism employment plan that identifies the upcoming employment opportunities in tourism and the required skills in order to fulfill these opportunities.
2. Skills inventory to identify the skill levels and gaps in the X region.
3. Training and development plan to match clients in the X region to tourism opportunities in the region.
4. Annual Workplan that identifies projects, revenues and expenditures.
5. Annual evaluation that assesses progress and makes recommendations for future direction.

Your organization:

Name Date

Title

Organization

Partnering Organization:

Name Date

Title

Organization

**Example 4: Sample Partnership Letter**

(Date)

By e-mail

(Address)

Dear XX:

Thank you for taking the time to talk to me about a potential funding co-sponsorship between the XX ASETS holder and XX Company. Your institution is doing so many great things with a terrific supporting cast. It is our hope that an association with XX Company will just add one more item to an impressive list of XX ASETS holder activities.

I provided you with a very brief overview of the funding partnerships that we have established with (XX organizations). All of these partnerships share the same characteristics. Our partner shares our desire to increase employment and skills for local people. Each partner is interested in finding innovative, effective and supportive ways to fill labour market gaps in our community.

Let me explain how I think a partnership between our organizations could work.

Co-sponsorship of innovative research

XX Company would enter into a partnership with XX ASETS holder to co-fund one or more innovative Aboriginal employment projects in the XX region.

Once we have an agreement in place, XX Company and XX ASETS holder would work together to determine the labour market needs in the community, the people available to fill those positions and the skills they would need to acquire to take advantage of these opportunities.

Based on this analysis, XX Company and XX ASETS holder would work together to develop a training and employment plan that would result in XX people trained, XX people gaining work experience and XX people obtaining full-time employment.

XX Company would contribute to the wages of the clients during the work experience period of the project, assist in the development of training strategies, and provide the clients with mentors within the company to contribute to their success.

XX Company would also guarantee full time, long-term jobs to XX successful clients of the project.

XX ASETS holder would fund the training, contribute to the development of the training plan, contribute to the cost of wages during the work experience component of the project, and provide client assessment, referral and support (counselling).

The partners agree to meet no less than once a month to ensure that the partnership remains effective and successful.

There are many advantages to this type of partnership. You will gain valuable employees while you ensure that people in your community will be able to take advantage of upcoming employment opportunities.

I am available as needed to discuss this further with you at any time. Please let me know how you wish to proceed. I look forward to hearing from you soon.

Sincerely,

XXX

## 10. Developing an Action Plan

An action plan is a tool for planning during a specific period of time (typically 6 to 12 months) that identifies the goal to be achieved, and ways to achieve it. It is a standard project management tool.

Action plans are developed by:

* Involving all partners in the action planning. The higher the level of involvement from the partners, the more invested and committed the partners will feel toward the partnership project;
* Thinking backwards, starting with where you want to be at the end of the period, and generate the steps needed to get there from where you are now; and,
* Reviewing the four key questions of management and use that as a skeleton for your discussions and thinking.

The four key questions and related steps are:

* What do we want (i.e. what is our goal)?
  + Reviewing your understanding of the current situation.
* What do we have?
  + Determining the resources (human, expertise, land or space, tools or financial) that are needed to undertake the actions and reach the goal.
* How do we get what we want with what we have?
  + Identifying concrete steps that close the gaps between the current situation and reaching the particular goal;
  + Identifying whom will take lead responsibility for undertaking each action;
  + Estimating the timeframe required to complete the tasks or actions; and,
  + Identifying any support that may be required.
* What will happen when we get there?
  + Assessing what is the potential impact of the activities; and,
  + Establishing key milestones or decision points to help you assess whether or not the action plan is on track.

Reference: Bartle, Phil (2011), Community Empowerment Collective Management, Participatory

## 11. Action Plan Template

Goal: …………………………………………………………………………

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Actions**  *What needs to be done to achieve the goal?* | **Steps**  *What are the tasks to implement each action?* | **Resources**  *What do you require to conduct each action (financial, material, and human)* | **Lead**  *Who will do it?* | **Timeframe**  *When will it be done?* | **Milestones / Decisions Points**  *How will you know that the action is on track or that it has been completed?* |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## 

## 12. Sample Data Collection Plan

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Assessment Questions** | **Indicators** | **Data Collection Plan** | | | | | | |
| **What do I want to know?** | **“I expect to have…”** | **Does data exist?** | **Where can I find this info?** | **Who can provide the data?** | **Who will collect the info?** | **How often will the data be collected?** | **How many?** | **When will I collect the data?** |
| *Example:*  *Were the activities implemented as planned?* | ***Process indicator***  Literacy and essential skills (LES) training activities will be delivered twice per week, on Mondays and Wednesdays for a total of 4 hours/week. | Yes  No | Activity log | LES trainer | Project Coordinator | On a monthly basis | All activity logs | September to December |
| *Did the project enable clients to improve their work skills?* | ***Outcome indicator***  At least 85% of clients who have participated in the project will have improved their work skills. | Yes  No | Pre and post-participation assessment | Clients | LES Trainer | Twice a year (two cohorts per year) | All clients assessment | 1 week before and 1 week after participating in the project |

## 13. Motivational Factors and Strategies

Below are factors known to influence motivation and strategies to address them within a partnership. Do not hesitate to add factors that speak to you and to identify strategies to tackle each factor.

| **Motivational Factors** | **Strategies** |
| --- | --- |
| **Involvement** | * Setting a vision collaboratively; * Ensuring / renewing commitment to the project; * Establishing communication protocol to ensure regular communications; and, * Holding regular meetings. |
| **Recognition of efforts** | * Setting and regularly updating an action plan (leads should get recognition for tasks or milestones completed); * Planning small celebrations to mark the accomplishment of milestones; * Preparing recognition certificates for partners; and, * Including partners names’ and recognise their support in publicities, reports and communications. |
| **Influence** | * Involving partners in decisions and sharing responsibilities where feasible; * Holding regular meetings to discuss progress and next steps; and, * Involving partners in action planning. |
| **Sense of achievement** | * Developing and regularly updating an action plan to show progress towards goals; * Holding regular meetings to discuss progress; and, * Evaluating and reporting on successes. |
| **Trust** | * Discussing legal and financial implications from the get-go; * Communicating and meeting regularly; * Keeping your word and your end of the bargain; and, * Discussing and dealing with challenges openly. |
| **Clear Goals** | * Using the SMART (Specific, Measurable, Achievable, Realistic and Timely) principles to develop goals; and * Determining whether your goals are short term, mid-term, or long-term. |
| **Leadership** | * Selecting a project leader; * Reviewing project leadership at set times during the life of the project; * Determining a decision-making process; and * Ensuring ongoing communication. |
| **Responsibilities** | * Establishing a group charter; * Identifying roles and responsibilities for all partners; and * Developing an action plan. |

## 14. Problem Solving Log

This log will help you keep track of your problem solving experiences. Use it to monitor your progress with problem solving or to solve future problems by looking back on how you successfully dealt with similar situations.

Visit the website, <http://www.esdc.gc.ca/eng/jobs/les/index.shtml> to download additional copies of this log.

Date:

**Problem:**

**Challenges:**

**Chosen Solution(s):**

**Result(s):**

## 15. Problem Solving Worksheet

This worksheet, taken from the Office of Literacy and Essential Skills publication titled

*Problem Solved! A guide for Employees and Learners,* is a great tool to help guide you through the problem solving process. Complete each step to help you work towards a solution. Visit the website, <http://www.esdc.gc.ca/eng/jobs/les/index.shtml> to download additional copies of this log.

**Step 1:** What is the problem?

* What are the symptoms of the problem?
* What is the root cause of the problem?

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**Step 2:** What are the potential solutions?

* Are there any factors that you need to consider when choosing a solution (e.g. policies or procedures)?
* What are the advantages and disadvantages of each possible solution?
* What are the consequences of each possible solution?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Step 3:** What is the best solution?

* Which solution is the best overall? Why?
* Choose a solution and act on it!

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**Step 4:** Is the problem solved?

* Did the chosen solution solve the problem? If not return to step 1 to review the problem again. Try using a different approach.

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## 16. Conflict Resolution Strategies

Conflict is a natural element of all groups and partnerships. Without it, people would not be challenged to think beyond their everyday, routine boundaries. When a variety of people with different perspectives, values, experiences, education, lifestyles and interests come together, differences multiply. That diversity can enrich discussion, ideas and project goals if the conflict and tensions that emerge are resolved and the group uses the learning to improve its work.

Conflict can also negatively affect the success of the partnership. The solution is for the group to deal with its conflict constructively, before it becomes established, spreads and wears down the foundation to the point where the partnership cannot carry on any longer.

Understanding conflict is important before you can deal with it effectively. Recognizing and understanding what may be happening is the first step in resolving the situation effectively.

Some conflicts can be avoided entirely, or at least kept from escalating, if you understand what is happening, your style and attitudes about conflict and its causes.

**Guidelines for Resolving Conflict**

To help resolve conflict within your group, consider and adopt the following principles. Several strategies are suggested that will show your commitment to the process of finding a reasonable solution.

**Underneath incompatible positions lie compatible interests**

Dig for and reach the compatible interests.

**Issues become the focal point when there is little or no dialogue**

Initiate discussion and dialogue, encouraging participation.

**High emotions charge the issue**

Create an environment where people can express their feelings and concerns.

**Parties will focus on differences**

Try to identify areas you have in common, remind the group of these commonalities and express progress.

**Parties may become defensive and protect, justify or explain their position**

Search for solutions: seek to understand but remember the need to move on.

**Parties will immediately want to discuss their individual needs**

Only when contact and good will have been established should needs be discussed.

**Parties often feel their story has not been heard**

Listen to each party’s needs, and ensure each party listens to the other.

**Identifying and understanding the desired outcomes will result in progress**

Step back and think about the expected outcomes of the project.

**Conflict creates emotions and feelings that are barriers to progress**

Take stock here and now, identify and understand the emotions, and move the discussion to approaches, strategies and desired outcomes

Source: Ontario Ministry of Agriculture, Food and Rural Affairs, see: <http://www.omafra.gov.on.ca/english/rural/facts/06-067.htm>

## 17. Closure Checklist

The following are some suggestions about formalizing and recognizing closure and endings to partnerships. Ask the members of the partnership to consider the following:

* What have been the major successes of the partnership?
* What can be done to acknowledge all the hard work?
* Recall what each person or organization contributed.
* Who needs to be recognized within the group and outside?
* What needs to be conveyed outside the partnership regarding the ending or closure of the partnership?
* How will the history of the partnership be captured?
* How will contributions and successes be celebrated or recognized?
* Who should be included in an official closing?
* Celebrate and prepare to move on!

## 18. Sample Recognition Letter

Dear (*insert partner’s contact name*),

On behalf of *(insert name of your organization)*, I would like to thank you for *(insert partner’s organization name)* contribution to the *(insert name of project)*. Because of your partnership, we have been able to (*include specific results if available such as # of clients reached or trained, or # of clients who have found employment).*

Aboriginal populations are Canada’s fastest growing population but many do not have the tools and resources they need to realize their full potential and explore opportunities. Our organization is here to assist them in reaching their goals. Support from organizations like *(insert partner’s organization name)* helps us continue our mission (*insert your organization’s mission here, e.g. to provide support and opportunities to Aboriginal people to find meaningful and sustainable jobs*).

Together, our work helps Aboriginal people from our community prepare for, obtain and maintain employment.

We look forward to working together on future efforts.

Thank you,

(*signature)*

(*insert name, title, organization)*

## 19. Certificate of Recognition

Simply double click inside the orange rectangle to open the certificate. To edit it, right click on the image, select Presentation Object and Open.

Press Esc to return to the handbook.



## 20. Partnership Recap Checklist

What does it take to find, build and nurture a Partnership?

You will find below a step-by-step checklist that will help you to ensure that you have taken all of the necessary steps that contribute to a successful partnership.

**STEP 1 - Defining Partnerships**

Do you have a good understanding of what a partnership is?

Is a partnership the best business relationship for the goals we wish to accomplish?

Does it make sense, in this context, to:

* Share authority?
* Have a joint investment of resources?
* Enjoy mutual benefits from the partnership?
* Share risk, responsibility and accountability?

What is the added value of entering into a partnership agreement among the parties?

Red Flags:

* Potential risks seem to be higher than the potential rewards of entering into the partnership;
* The balance of rewards seems to weigh heavily towards some organizations, and not for others;
* The level of contribution amongst partners is highly unequal; and
* The same goals could be met individually as under the partnership, or through a more simple relationship such as a service agreement. As a result the partnership is simply an added level of complexity that may not be needed.

Have you determine the purpose of the proposed partnership?

Consultative or Advisory

Partnerships that are formed to receive public input around change or to gather ideas for future policies.

Contributory

Partnerships that are formed to benefit the work of a community or community organization; however, the founders set the objectives and the partners can agree to them or not.

Operational

Partnerships that are formed to set the strategic direction for a product or service; however, the operational implementation of the product or service is taken on by one partner.

Collaborative

Partnerships that are formed to share resources, risks and decision-making. This is the type most often found in community-based partnerships.

**STEP 2** **- Identifying and Approaching Partners**

Have **you contacted the following organizations to explore partnership opportunities?**

* Community organizations
* Local educational institutions;
* Chambers of commerce;
* Interest groups**;**
* Local government organizations;
* Provincial and federal government organizations;
* Local employers; and,
* Community leaders.

Have you contacted other ASETS agreement holders to ask them who their partners have been in similar potential partnerships?

Have you asked potential partners to discuss partnership opportunities, to ask them if they know of any others that may be interested in this opportunity?

Have you articulated your goals and aspirations for the partnership clearly?

Have you had a larger group discussion regarding partnership possibilities?

**Things to remember:**

* You do not need to have everything laid out, but an idea of what you would like to achieve is important;
* It is useful to identify why you think this partnership could be mutually beneficial to the organization you are speaking with; and,
* It is equally important to demonstrate flexibility and openness to other ideas and suggestions on who should be involved, potential benefits and how the objectives can be achieved.

**STEP 3** **- Assessing the Partnership Climate and Partnership Building Skills**

* Are partners ready, willing and able to participate?
* Has each partner undertaken an individual and organizational assessment, to determine the partnership climate?
* Has a community assessment been undertaken?

Do partners have the right partnership building skills and attitudes?

* + Management Skills
  + Negotiation Skills
  + Group Processes and Team Building Skills
  + Planning Skills
  + Evaluation Skills
  + Problem Solving and Conflict Resolution Skills
  + Time Management Skills
  + Financial Management Skills
  + Skills for Managing Outside Help

**STEP 4 - Creating Partnership Infrastructure**

* Has a vision for the partnership been established?
* Have partnership goals been established?
* Has a SWOT analysis been undertaken to ensure that all risks and benefits of the partnership have been developed?
* Have the implications of the partnership been discussed? (Legal, Financial, Organizational)
* Have all of the partners committed to the partnership? Which commitment mechanism has been selected?
* Has a partnership leader, or leadership process, been developed? Do all of the partners understand and agree with this leadership process?
* Is there a clear understanding of the roles and responsibilities of each partnership member?
* Has a decision-making process been determined? Do all partners understand and agree with the decision-making process?
* Have communication protocols been established?

**STEP 5** - **Delivering the Partnership Project**

* Have clear, “mini” action plans been developed for each partnership goal?
* Have resources been attached to each of the goals?
* Has a strategy for building upon the capacity within the partnership to deliver the project been established?
* Has the project been implemented?
* Are you applying promising practices in the management of the project and of the partnership itself?

**STEP 6 - Monitoring and Measuring the Partnership**

* Have indicators been established to monitor and assess progress?
* Has a plan for collecting the information been developed?
* Has the information been collected according to the plan?
* Has the information collected been analysed? Have you identified common themes or trends?
* Have lessons learned been identified?
* Have recommendations to adjust the project been made?
* Have you shared findings with stakeholders and funders?

**STEP 7 - Troubleshooting**

* Have the partners discussed possible strategies in advance, should problems arise?
* Do the partners have a good strategy for closing the partnership when the project is complete or under other circumstances?

**STEP 8 - Revising and Adapting**

* Has the action plan been revised in relation to your monitoring and measuring findings?
* What can be done differently to meet your goals?
* Who will do it?
* Are new resources required?
* Is support needed to implement the new activities?
* What are the timeframes for the new activities?
* What are the key decisions points?
* Do you need to expand or change the project to meet new goals?
* If so, have you thought about implications at various stages of the Partnership cycle?

**STEP 9 - Moving On**

* Are you continuing the partnership project or are you bringing closure to it?
* If you are bringing closure, have you discussed with all partners if they are comfortable with the closure?
* Have you identified a means to recognize and celebrate the successes of the partnership and the contribution of partners?
* If you are maintaining your partnership, have partners renewed their commitment? Have you considered formalizing your partnership?
* Have you developed a plan to secure long-term funding?
* Will there be new partners joining the partnership? What are the implications at each phases of the partnership cycle?

# Additional Resources

*If you would like to contribute additional resources to the Partnership Handbook, please contact your regional office Service Canada representative.*

**Partnership Resources:**

Developing Partnerships to Support Literacy and Essential Skills

Office of Literacy and Essential Skills

<http://www.esdc.gc.ca/eng/jobs/les/tools/index.shtml>

The Aboriginal-Industry Partnership Guide for the New Economy

<http://aboriginalskills.ca/_downloads/Partnership_Guide_%28eng%29.pdf>

The Partnering Initiative

<http://thepartneringinitiative.org/>

The Victorian Council of Social Services Partnership Practice Guides

<http://vcoss.org.au/strong-sector/partnerships-decd/>

**Action Planning Resources:**

Civicus World Alliance for Citizen Participation

Action Plan Toolkit

<http://civicus.org/resources/toolkits/227-action-planning>

# Glossary of Terms

**AHRDS:** Aboriginal Human Resources Development Strategy

**AOP:** Annual Operational Plan

**ASEP:** Aboriginal Skills and Employment Partnership

**ASETS:** Aboriginal Skills and Employment Training Strategy

**ASTSIF:** Aboriginal Skills and Training Strategic Investment Fund

**Collaboration:** The act of working together to achieve a common goal.

**Partner:** A member of a partnership.

**Partnership:** A relationship between two parties who agree to work together towards mutual goals.

**SPF:** Skills and Partnership Fund

**Stakeholder:** An individual, group, institution, or government with an interest or concern, economic, societal, or environmental, in a particular measure, proposal, or event.

**Relationship:** A state of affairs existing between those having relations or dealings.

1. “The Partnership Handbook”, published by HRDC in 2000 can be found at the following website: http://publications.gc.ca/site/eng/90788/publication.html. [↑](#footnote-ref-1)
2. The Partnering Initiative is a specialist program of the International Business Leaders Forum. For more information go to: <http://www.thepartneringinitiative.org> [↑](#footnote-ref-2)
3. The advantages and disadvantages of partnerships has been derived from the following web site:

   <http://www.how-to-start-a-business-guide.com/partnership-advantages.html> [↑](#footnote-ref-3)
4. The Aboriginal Labour Market Bulletin is available on the ASETS website at: <http://www.esdc.gc.ca/eng/jobs/aboriginal/bulletins/index.shtml> [↑](#footnote-ref-4)
5. The ASTSIF Best Practices Workshop report is available through your local Service Canada office. [↑](#footnote-ref-5)
6. Information included in this section is derived from the following resource: <http://www.camh.ca/en/hospital/about_camh/health_promotion/culture_counts/Pages/culture_counts_chap2_partners.aspx> [↑](#footnote-ref-6)
7. Taken from « The Community Development Handbook: A Tool to Build Community Capacity”, Flo Frank and Ann Smith (1999) for HRSDC. [↑](#footnote-ref-7)