

Appendix

Wild Rose Foundation

Alberta Community Development acknowledges the contribution of the following organizations who have given their permission to include them in this resource. This list is not exhaustive and is provided solely for the users' information and, while thought to be accurate, is provided strictly as is and without warranty of any kind.

Templates on pages 22 to 50 of this Appendix are from *The Collaboration Handbook: Creating, Sustaining and Enjoying the Journey* by Michael Winer and Karen Ray. Copyright 1994 Amherst H. Wilder Foundation. Used with permission. For more information on Wilder Foundation publications, call 1-800-274-6024 or visit www.wilder.org.

Working in Partnership: Recipes for Success was designed as a kit that could be used by all types of organizations that are considering partnerships. Often as organizations move into the partnership process they discover a need for more specific information on particular types of partnerships or detailed descriptions on specific aspects of partnering. There is also a desire for case studies that document the experience of others or templates that help organizations with various parts of the partnering process. This Appendix offers a description of other resources that are available, with links to accessing those resources. The Appendix is divided into three parts:

1. Resources for Alberta's Voluntary Sector

There are a large number of agencies in Alberta whose mandate is to support volunteer organizations. While there is no agency particularly devoted to partnering, all of these support organizations have experience in the partnering process. This section describes the work of these various organizations and provides contact information. This section also includes web addresses for Alberta-based organizations.

2. Web Based Information

A number of Canadian and U.S. organizations, such as the Conference Board of Canada, have done extensive work in the partnership area and make information available on their websites. This section contains descriptions of a number of websites where volunteer organizations can obtain more specific information on a variety of partnership questions.

3. Publications

This section is an annotated bibliography of a wide variety of publications in both electronic and print form. In addition to describing the publication, each entry indicates the type of partnership addressed and whether case studies or templates are included in the publication.

If you have any questions or comments regarding Working in Partnership – Recipes for Success, please contact:

Laurie Kolada, Wild Rose Foundation/ Volunteer Services Branch
Alberta Community Development
#907 Standard Life Centre
10405 Jasper Avenue
Edmonton, Alberta, Canada T5J 4R7
Telephone: (780) 422-2203
Fax: (780) 427-4155
Email: Laurie.Kolada@gov.ab.ca

Alberta Community Development Offices

The Volunteer Services Branch provides leadership "in advancing a high quality of life for Albertans" through the Ministry core business of Promoting Community Development. The Branch focuses on increasing the capacity for self-reliance of the voluntary sector by working with individuals and organizations to enable them to achieve self-determined development goals and to enhance their capacity to participate in community development initiatives through interdependent relationships with the public and private sectors. Support is offered in the following ways:

- **Provision of skill development training and facilitated learning opportunities.**
Programs/services may include governance, leadership development, partnership building, community development principles and practice, organizational development (i.e., proposal writing, program evaluation, etc.) and facilitator training.
- **Provision of facilitation services to assist with public participation and organizational development.**
Programs/services may include Public Input, Planning, Teambuilding, Problem solving, Partnership Development (Building), and Community Building.
- **Provision of information and consultative services on organizational development, volunteer development and community development principles and practices.**
Programs/services may include the annual Vitalize Conference, Volunteer Week, presentations (responding to client requests), and individual consultations (responding to client requests).
- **Provision of financial assistance to community organizations.**
Programs/services may include Quarterly grants program, International Development Grant Program and the Youth Grant Program.

The Volunteer Services Branch works cooperatively, providing services and programs to:

- Any Alberta community or community organization;
- Other Government Departments and Agencies;
- Volunteer and Not-For-Profit Organizations.

Communities have access to support and assistance from the Volunteer Services Branch through nine regional offices located across the province. Contact information is listed below:

St. Paul

3rd Floor, Provincial Building
5025 - 49 Avenue, Box 318
St. Paul, Alberta T0A 3A4
Telephone: (780) 645-6353
Fax: (780) 645-4760

Stony Plain

Provincial Building
4709 - 44 Avenue
Stony Plain, Alberta T7N 1N4
Telephone: (780) 963-2281
Fax: (780) 963-7009

Grande Prairie

Room 1601, Provincial Building
10320 - 99 Street
Grande Prairie, Alberta T8V 6J4
Telephone: (780) 538-5644
Fax: (780) 538-5308

Cochrane

Box 266, Provincial Building
213 - 1 Street West
Cochrane, Alberta T4C 1A5
Telephone: (403) 932-2970
Fax: (403) 932-6017

High Prairie

Provincial Building
5226 - 53 Avenue, Box 1078
High Prairie, Alberta T0G 1E0
Telephone: (780) 523-6536
Fax: (780) 523-6538

Red Deer

6th Floor, Provincial Building
4920 - 51 Street
Red Deer, Alberta T4N 6K8
Telephone: (403) 340-5115
Fax: (403) 340-5381

Peace River

3rd Floor, Provincial Building
Bag 900-11
9621 - 96 Avenue
Peace River, Alberta T8S 1T4
Telephone: (780) 624-6295
Fax: (780) 624-6228

Lethbridge

Room 406, Administration Building
909 Third Avenue North
Lethbridge, Alberta T1H 0H5
Telephone: (403) 381-5231
Fax: (403) 329-8816

Medicine Hat

346 - Third Street S.E.
Medicine Hat, Alberta T1A 0G7
Telephone: (403) 529-3156
Fax: (403) 526-8813

Grant MacEwan College, Resource Centre for Volunteer Organizations

The Resource Centre for Volunteer Organizations (RCVO) at Grant MacEwan College maintains a number of information resources relevant to the volunteer community. Created in 1985, the Centre hosts a library of print and visual sources related to fundraising, non-profit agency management, volunteer management and board development. Working in partnership with Grant MacEwan and the Canadian Centre for Philanthropy, RCVO acts as the secretariat for the Alberta Association of Fundraising Executives (AAFRE).

The RCVO endeavors to make its information as accessible as possible particularly in Alberta. The Centre's staff assist both walk-in clientele who want to use reference resources and others who call with their requests. The Centre offers a fax back service, as well as an email service for providing information. When a client poses a question, staff will research it - referring to the Centre's books, journals and articles on file, searching the internet and responding with the information they have found. If staff are unable to answer the question, they refer clients to other sources of assistance. The organization also takes its resources on the road into rural Alberta through the "RCVO on the Road" program.

Contact:

Grant MacEwan College, Resource Centre for Voluntary Organizations

5-132, 10700 - 104 Avenue
Edmonton, AB T5J 4S2
Telephone: (780) 497-5616
Fax: (780) 497-5634
Toll Free (In Alberta): 1-887-897-5616

Volunteer Alberta

Volunteer Alberta is the co-ordinating agency of volunteer centres in Alberta. Because not every community is large enough to support a volunteer centre, membership includes family and community support services bureaus, recreation & culture boards and numerous provincial and local organizations that rely on volunteers to get their work done.

Specifically, Volunteer Alberta:

- provides support and networking opportunities to connect organizations in the voluntary sector around the province
- acts as a resource to those communities that do not have volunteer centres
- distributes a quarterly newsletter, keeping organizations aware of issues that affect them provincially and nationally
- supports volunteerism in all sector
- works to raise awareness of the issues facing volunteers and the organizations they work in
- encourages participation in provincial and national programs such as Volunteer Week and Volunteer Screening.

Contact:

Volunteer Alberta

50 Sir Winston Churchill Avenue
St. Albert, AB T8N 0G4
Telephone: (780) 418-6336
Fax: (780) 460-1365
Toll Free (In Alta.): 1-877-915-6336

Volunteer Centres:

Volunteer Calgary

9th Floor, 640-8th Avenue. S.W.
Calgary, AB T2P 1G7
Telephone: (403) 265-5633
Fax: (403) 265-8981

Volunteer Centre of Camrose & District

4909 C - 48 Street
Camrose, AB T4V 1L7
Telephone: (780) 672-0141
Fax: (780) 672-2833

Volunteer Action Centre Fort McMurray

Box 6183
#51 Peter Pond Mall
Fort McMurray, AB T9H 4W1
Telephone: (780) 715-0152
Fax: (780) 791-6614

Volunteer Centre of Fort Saskatchewan

10213-100 Avenue
Fort Saskatchewan, AB T8L 1Y7
Telephone: (780) 992-6281
Fax: (780) 992-0192

Grande Prairie Volunteer Services Bureau

#121, Centre 2000
11330-106 Street
Grande Prairie, AB T8V 7X9
Telephone: (780) 538-2727
Fax: (780) 539-5986

Hinton Volunteer & Information Centre

2nd Floor, 131 Civic Centre Road
Hinton, AB T7V 2E5
Telephone: (780) 865-6060
Fax: (780) 865-6065

Volunteer Lethbridge

207-13th Street North
Lethbridge, AB T1H 2R6
Telephone: (403) 320-2044
Fax: (403) 320-2046

Town of Okotoks

P.O. Bag 20
Okotoks, AB T1S 1K1
Telephone: (403) 938-8935
Fax: (403) 938-8934

Community Information & Referral Society

4730 Ross Street, Crimson Centre
Red Deer, AB T4N 1X2
Telephone: (403) 346-4636
Fax: (403) 340-8193

Information & Volunteer Centre for Strathcona County

100 Ordze Avenue
Sherwood Park, AB T8B 1M6
Telephone: (780) 464-4242
Fax: (780) 449-1354

St. Albert Community Information & Volunteer Centre

50 Sir Winston Churchill Avenue
St. Albert, AB T8N 0G4
Telephone: (780) 459-6666
Fax: (780) 460-1365

Sylvan Lake Volunteer & Information Centre

4926-50 Avenue
Sylvan Lake, AB T4S 1A1
Telephone: (403) 887-1188
Fax: (403) 887-3660

Stettler & District Volunteer Centre

Box 2097
4720-50th Street
Stettler, AB T0C 2L0
Telephone: (403) 742-1155
Fax: (403) 742-1391

Volunteer Calgary

Volunteer Calgary's mandate is to assist Calgarians and area residents in finding volunteer placements. It provides information to users on places people can volunteer through media ads, phone and in-person interviews and through a computer self referral system.

Volunteer Calgary is involved in the ongoing recruitment and referral of more than 15,000 volunteers annually. Specialized recruitment programs involve youth, families, retirees, employees and persons with disabilities in becoming the volunteers of today and tomorrow.

Volunteer Calgary hosts special events and coordinates public relations activities that promote volunteerism in the local community. The organization celebrates National Volunteer Week annually with Leadership Awards which salute Calgarians of all ages for their contributions to the community. The Leaders of Tomorrow Program recognizes and salutes youth for their contributions.

To assist organizations increase their overall effectiveness, staff and volunteers of Volunteer Calgary provide training and consultation geared to the ever changing needs of today's non-profit organizations. It delivers workshops, certificate programs in volunteer management, and consultation services in employee, retiree and family volunteerism.

Volunteer Calgary also boasts a library with one of the largest collections of fundraising, non-profit and volunteer management resources in southern Alberta. Partnership resources are included and many contain bibliographies to sources available elsewhere. The web site includes a searchable database of most library resources. For a \$20.00 membership, people can take out three items at a time except marked reference material.

Contact:

Volunteer Calgary

900, 640-8 Ave. SW
Calgary, AB T2P 1G7
Telephone: (403) 265-5633
Fax: (403) 265-8981
Toll Free: 1-800-200-2207
Website: www.volunteercalgary.ab.ca
Email: volunteer@volunteercalgary.ab.ca

Mount Royal College Institute for Nonprofit Studies

The first of its kind in Canada, Mount Royal College has created an innovative and progressive institute that provides information, training, skills development and practical research within the nonprofit sector. The institute will be recognized among nonprofit organizations for educational programs that respond to the sector's needs, as well as for collaborative efforts and partnerships within the nonprofit sector.

Currently, the institute is partnered with Grant MacEwan College in Edmonton which offers the first two years of the degree program as a diploma option for students in the northern area of the province. Students exiting Grant MacEwan can enter the Mount Royal College program and, upon completing the final two years, can be awarded the applied degree in Nonprofit Studies.

Contact:

Institute for Nonprofit Management

4825 Richard Rd. SW
Calgary, AB T3E 6K6
Telephone: (403) 240-7055
Fax: (403) 240-6040
Website: www.mtroyal.ab.ca

Muttart Foundation

The Muttart Foundation was incorporated as a private charitable foundation in 1953 by Merrill Muttart and Gladys Muttart based on a strong belief in and support of private philanthropy. The Foundation helps charities improve their funding from an organizational perspective. It recognizes that charity funding is often based on specific programs or needs but that the health of a charity is based on its breadth and depth of support. In helping charities meet this funding need, the Foundation will assist charities to establish infrastructures so they can minimize organizational deficiencies and capitalize on funding opportunities.

The Foundation has many programs stretching from loans to consulting services. It provides consultations on various topics through an established relationship with Varsity Consulting Services. Under this arrangement, second-year MBA students from the University of Alberta are available to work with charities on certain issues. These have ranged from assistance with developing appropriate financial reporting systems to investigation of entrepreneurial possibilities.

Since the early 1990s, the Foundation has focused its funding in Alberta, Saskatchewan, the Yukon, and the Northwest Territories. Most of its funding has supported social service programs, particularly those related to children and youth. In recent years, the Foundation has also been active in programs that increase the capacity of the charitable sector generally.

In the future, the Muttart Foundation plans to open a resource centre that will be open to the public.

Contact:

Muttart Foundation

Suite 1150
Scotia Tower One, 10060 Jasper Avenue
Edmonton, AB T5J 3R8
Phone: (780) 425-9616
Fax: (780) 425-0282
Toll Free: 1-877-788-5437

Calgary Centre for Nonprofit Management

The Calgary Centre for Nonprofit Management is a registered charitable non-profit organization. It provides business-consulting services to Calgary and area nonprofit organizations. These services are supported by corporate and foundation donors within the Calgary community and across Canada. The Centre uses volunteer consultants to help nonprofits realize long-term goals such as partnering with other organizations. This reduces the consulting costs to non-profit organizations. Centre consultations are tailored to organizations based on past experience and needs. The Centre offers consulting services in all areas from board development to marketing and communications planning. Organizational performance is assessed using the Centre's "Generally Accepted Practices in Non-Profit Management".

In addition to its consulting services, the Centre also offers a number of workshops and seminars through its partner, Working Concepts Inc. For example, there is currently a one-day course offered on computer and technology training. The Centre charges \$145.00 for one six-hour session and purchasers can opt to change their course selection within a one year period.

The Centre is not a free resource and is not a source of bibliographic references on partnerships. The Centre is a consulting resource on management consulting and organizational planning for nonprofit organizations.

Contact:

Calgary Centre for Nonprofit Management

10th Floor, 1202 Centre Street South

Calgary, Alberta, Canada T2G 5A5

Telephone: (403) 517-8600

Fax: (403) 538-8601

Email: centre@thecentre.ab.ca

Website: www.thecentre.ab.ca

Canadian Centre for Philanthropy

The Canadian Centre for Philanthropy is a national charitable organization dedicated to advancing the role and interests of the charitable sector for the benefit of Canadian communities.

It is a membership-based, leadership organization for charitable, voluntary organizations, and the corporations and foundations that support them. The Centre generates and gathers information and analysis about the environment in which Canadian charities operate. Its goal is to help strengthen charitable, voluntary, and non-profit organizations through public affairs, research, information resources, and the Imagine program.

The Centre offers many services but one of its most important related to partnerships is its IMAGINE program. IMAGINE was initiated in 1988 to encourage and promote partnerships between the corporate and charitable sectors. The program helps organizations set out frameworks to developing successful partnerships and recognizes these efforts through various award and other programs.

Contact:

Canadian Centre for Philanthropy

425 University Avenue, Suite 700

Toronto, Ontario M5G 1T6

Telephone: 416-597-2293

Fax: 416-597-2294

Email: General@ccp.ca

Canadian Centre for Social Entrepreneurship

The Canadian Centre for Social Entrepreneurship (CCSE) has a mandate to strengthen community capacity through strategic alliances, creative thinking and innovative practices.

The CCSE has three streams of programming: Research, Education and Community Engagement. The streams are mutually reinforcing as research supports the education component and this allows the CCSE to interact with the community with credibility on the subject of social entrepreneurship.

In the Community Engagement area, CCSE provides a national discussion group with web published highlights, awards and a web site portal to other resources. In the Education area, CCME offers a two-day workshop on building strategic alliances called: "Strategic Alliances: Seeking Common Group Workshop" and ongoing speakers series. Finally, the Research area offers numerous resources including case studies and ongoing conference presentations.

Contact:

Canadian Centre for Social Entrepreneurship

3-30Q Business Building

University of Alberta

Edmonton, Alberta

T6G 2R6, Canada

Telephone: (780) 492-0187

Fax: (780) 492-3325

Email: ccse@ualberta.ca

Website: www.bus.valberta.ca/ccse/

Volunteer Canada

Established in 1977, Volunteer Canada is the national voice for volunteerism. It is committed to supporting volunteerism and civic participation through ongoing programs and special projects.

National in scope, Volunteer Canada's board members, partners and members represent hundreds of different communities across Canada. Its membership includes 86 volunteer centres in nine provinces, including the federation of 109 volunteer centres in Quebec. Members have access to a resource network of over 10,000 community organizations as well as a membership network of over 600 nonprofit organizations. Most resources will be found through locally affiliated volunteer centre.

Volunteer Canada actively develops resources and national initiatives in research and training that are designed to increase community participation across the country. Volunteer Canada also provides leadership on issues and trends in the Canadian volunteer movement.

Volunteer Canada also provides resources with the help of partners from the nonprofit, corporate and government sectors.

The web site provides links to all provinces in Canada and lists mailing address and other contact information for major provincial centres.

Contact:

Volunteer Canada

430 Gilmour Street

Ottawa, ON K2P 0R8

Telephone: (613) 231-4371

Fax: (613) 231-6725

Toll Free: 1-800-670-0401

Email: volunteer.canada@sympatico.ca

Website: www.volunteer.ca

Introduction

This section of the appendix presents web-based information from national and international sources. Web addresses for Alberta-based organizations are included in the Resources for Alberta's Voluntary Sector section.

Conference Board of Canada Web Site

www.conferenceboard.ca

The Conference Board of Canada is the premier independent applied research institute in the country. Its expertise falls into two broad areas. First, it provides knowledge about the external environment in which organizations operate. This includes the broad social and economic environment within Canada, as well as critical global trends and issues. Second, the Conference Board provides knowledge about organizational change, including change in management systems such as strategy, organizational structure, technology, human resources, information management and other important areas.

Every year the Conference Board hosts more than 250 meetings and conferences, holds over 80 leadership programs, publishes 150 research documents, and investigates more than 4500 requests for information from members.

The Conference Board web site has several sources related to partnership. To find these:

- Click on the "Products and Services" link;
- Scroll down and click on "Awards Programs". The Awards program recognizes excellence in business-education partnerships at all levels of the public education system;
- Click on "National Partners in Education Awards";
- There is an icon on the right side for descriptions of the "2001 Winners and other Conference Board IdeaBooks". The IdeaBooks contain linkable resources within, called "Broad Community Collaborations." Each page gives a brief summary of each partnership and contacts for more information;
- Click on the "Best Practices" link. It is located in the list along the left-hand side of the screen. This will lead to Learning Tools;
- Click on the "Best Practices" link again. This will lead to a list of case studies related to "Employability" and partnerships. There are several studies on effective partnering including CAREERS: The Next Generation's;
- Click on "Learning Tools"; and;
- Scroll down to "Business and Education Tools". On this page, under the heading "Business and Education Tools", are short PDF files for things such as "Ethical Guidelines for Business-Education Partnerships." (The Board's business-education publications are described in more detail in the Publications section that follows in this Appendix.)

Overall, the Conference Board of Canada's web site provides a wealth of knowledge for users looking into partnerships. However, retrieving these resources is difficult through the search engine and requires a prior knowledge of the site or some timely exploration.

EthicScan

www.ethicscan.ca

EthicScan's professional ethicists have years of specialized practical experience in a range of disciplines and applications, including ethics in business, health care, the voluntary sector, and government. Two of them have served as presidents of the Ethics Practitioners Association of Canada.

Each consulting associate is an experienced independent practitioner. Many are trained and licensed in the CARL and Do Diligence programs. Most are speakers at national and international forums dealing with ethics issues.

The site contains valuable partnership pre-screening information. To find this:

- From the home page click on "Products and Services" located on the left side of the page;
- Click on "Partnership Screening Reports"; and;
- This page will show an example of the reports Ethicscan does for clients.

The site also provides a report card that nonprofits can incorporate when analyzing a potential partner as well as a report that makes sense of the ranking. This would be a useful resource once the nonprofit has used other tools to properly define its mission and partnering goals.

Canadian Council for International Cooperation

www.ccic.ca

The Canadian Council for International Co-operation (CCIC) is a coalition of about 100 Canadian organizations which seek to change the course of human development in ways that favor social and economic equity, democratic participation, environmental integrity and respect for human rights.

Established in 1968, the Council conducts research, disseminates information and creates learning opportunities for its members, coordinating their collective efforts to shape new models for world development, press for national and international policies that serve the global public interest and build a social movement for global citizenship in Canada.

To access this information:

- Click on "Enter" to enter the site;
- Scroll down to the Voluntary Sector, and;
- Click on the link below this "Asking the C.Y.A. ..." Questions: Due Diligence in Our Engagements with the Private Sector." Clicking on this document will allow the user to access the .PDF file. The document contains useful checklists an organization should work through when considering engaging a private sector partner.

There are several strong partnership resources available through the search engine on this site, such as:

- NGO Engagement with the Voluntary Sector on a Global Agenda to End Poverty;
- Partners, Collaborators or Patron-Clients; Defining Relationships in the Aid Industry;
- Partnership in Question, and;
- Code of Ethics.

Centre for Innovation in Corporate Responsibility

www.cicr.net

The mission of the Centre for Innovation in Corporate Responsibility is to lead and assist businesses in redefining and realizing responsible international business practice. It aims to work in partnership with businesses working in or with developing countries to enhance business performance through sound corporate citizenship and responsible international business practices focused on sustainable human development.

Business leaders recognize that the nature of business and its corporate responsibility is changing rapidly and that enormous opportunities exist to enhance business performance through responsible business practice. A significant barrier is that quality information, management resources, and tools in this area are limited and difficult to identify and access. The Centre will directly address these challenges by becoming a leading "knowledge-brokering" centre of expertise for innovation in corporate responsibility.

The search engine located on the home page is also useful for finding other partnership resources From the homepage:

- Click on "More search options", located in the centre of the page near the bottom;
- Then, Scroll down to search by issues.

To go directly "Engaging Stakeholders and Business-NGO Partnerships in Developing Countries..."

- Click on "View and Download CICR's recent report Located on the left side of the page;
- www.cicr.net/files/StakeholderEngagement.pdf is the direct link for the PDF file.

This resource is available by .PDF and provides an excellent case study in how business and NGOs work together to bring about positive outcomes.

Partnership Development (Human Resources Development Canada)

www.hrdc-drhc.gc.ca/common/partner.shtml

Human Resources Development Canada (HRDC) has placed The Partnership Handbook on-line. Developed by HRDC's Labour Market Learning and Development Unit, the resource helps people learn more about what community-based partnerships are and to offer suggestions about how to be effective in them. It provides tools and tips to enhance partnerships, and outlines what is needed to move forward together.

Section I of the Handbook defines what a partnership is and what it is not. Section II identifies the conditions that support partnerships and provides examples of assessment tools. Section III outlines the partnership process and how to apply it. Section IV explores the knowledge, attitudes and skills required to undertake a partnership. Section V examines common issues and concerns as well as providing some possible solutions. Section VI describes the characteristics of a variety of partnership approaches.

Throughout, there are sections labeled "Lessons from Experience" and "Points to Ponder". The former provides quick points about various aspects of each section, while the latter offers questions based on the information that has been provided in each section. The questions, which are designed to help generate thoughts about what has been read and how it might apply to your own situation, can also be used to initiate discussion.

To access the resource online:

- From the home page, click to enter the site;
- Click on the link "programs and services" ;
- Scroll down to Partnership Information, and;
- Click on "the partnership handbook" link.

Amherst H. Wilder Foundation

www.wilder.org

The Amherst H. Wilder Foundation is a nonprofit health and human services organization that has served the greater Saint Paul, Minnesota, area since 1906. It operates more than 120 programs that serve people of all ages and backgrounds, with a focus on low-income individuals and families, people needing support during critical times in their lives, and Saint Paul's central neighborhoods and communities. It serves more than 50,000 people each year.

The Foundation runs dozens of outreach programs for families as well as individuals, many of which are geared towards children and mothers. The site lists several resources devoted to "Collaboration and Community Building".

To access this information:

- Click on "Publications". It is located on the left hand side of the page;
- On the next page scroll down to the link for "Collaboration and Community Building." Click on this link;
- This will lead to a list of several collaboration resource links such as for the "Collaboration Handbook" and "Collaboration: What Makes it Work?" (These publications are discussed in more detail in the Publications section of this Appendix);
- For more resources related to partnership return to the home page by clicking the very top left link labeled "Amherst H. Wilder Foundation"; and;
- On the home page type "Partnership" into the search engine text box and click "Go" There are many more resources available on the site related to partnership by using the site's search engine.

Although these resources are only available by subscription, small source descriptions and item prices (in U.S. currency) are given.

Points of Light Foundation - Volunteer Center and National Network

www.pointsoflight.org

The Foundation's mission is to engage more people more effectively in volunteer community service to help solve serious social problems.

Founded in May 1990, the Foundation is a nonpartisan nonprofit organization devoted to promoting volunteerism. The Foundation is based in Washington, DC, and works in communities throughout the United States through a network of over 500 Volunteer Centers.

The Foundation believes that, at the core of most social problems, lie disconnection and alienation. The organization is involved in a number of areas including assisting employers in developing workplace volunteer programs to providing products and services for volunteer management professionals.

Descriptions of partnership related services are available on the Points of Light web site. Below is a description on how to find out more about a training seminar called "Building Partnerships that Work."

To access this information:

- From the home page, go to the orange link bar on the left side of the page and click on "Training, Products & Services";
- There are five links in orange that list "corporate", "youth", "international" and "government". Click on "corporate";
- Scroll down and in its middle of the web page there is a link to a training seminar called "Building Partnerships that Work." Click on that link, and;
- On the "Building Partnerships that Work" web page, you will find a short seminar description and costing information as well as an e-mail address for more information.

Multi-Publication Sources

•Caledon Institute on Social Policy

Established in 1992, The Caledon Institute of Social Policy seeks to inform and influence public opinion and to foster public discussion on poverty and social policy; and develops and promotes concrete, practicable proposals for the reform of social programs at all levels of government. It also works on research promoting the social benefits provided by employers and the voluntary sector. The Caledon Institute produces brief commentaries and both popular and technical reports and books.

Contact:

Caledon Institute of Social Policy

1600 Scott Street, Suite 620

Ottawa, Ontario, Canada

K1Y 4N7

Telephone: (613) 729-3340

Fax: (613) 729-3896

Email: caledon@caledoninst.org

Website: www.caledoninst.org

Partnerships: The good the bad and the uncertain.

Torjman, Sherri. Caledon Institute of Social Policy: Ottawa, June 1998.

This is a solid introductory resource that explains partnerships to the reader. It begins by defining three different types of partnerships: public education, social marketing, and community investment. Public education organizations seek to raise awareness of social, economic or environmental concerns. Social marketing organizations enter into partnerships with corporations where the former benefits from corporate giving while the latter benefits by aligning with a strategic cause. The final form described is community investment, a partnership that involves monetary contributions in addition to human resources. The paper mentions case examples for each kind of partnership. In the case of community investment, the paper gives a short description of Chevron Canada's employee volunteer program. This resource also contains a long bibliography, many of the sources looking at the area of corporate social responsibility.

- **Sectors Addressed:** Public education, social marketing, community investment
- **Special Issues Addressed:** Defining partnerships, partnership advantages and disadvantages
- **Case Studies:** Not separate but mentioned within the text
- **Templates:** No
- **Research Base:** Bibliographic references contained at the end

The Partnership Handbook.

Frank, Flo & Smith, Anne. Caledon Institute for Social Policy. Ottawa

This is an excellent resource because of its brevity yet breadth of aspects covered. It takes an overall look at the considerations an organization should incorporate for effective partnership. For instance, it has a section on "Commitment" and asks readers to take steps and affirm that all partners agree to "move ahead" before fully committing to a formal relationship. One will need to supplement this resource with others that explain how one will be able to incorporate its prescriptions.

- **Sectors Addressed:** Nonprofits with all types of organizations
- **Special Issues Addressed:** Self assessment, action plans and roles and responsibilities definition
- **Case Studies:** No
- **Templates:** Yes. The entire handbook serves as a preliminary checklist
- **Research Base:** This is an excerpt from Human Resource Development Canada's "The Partnership Handbook: The Facilitator's Guide" at www.hrdc-drhc.gc.ca/common/partnr.shtml

Perspectives on Partnership.

Social Partnership Project. Caledon Institute for Social Policy. Ottawa: 1998

This is a good collection of papers that focus on examples of partnership from government to the private sector. It looks at several different types of partnerships. It first delves into those from the federal government perspective and how collaboration with private and other nonprofit organizations builds on available resources. It also looks at the issue of nonprofit organization competition for scarce resources. Finally, it reviews the growing trend within corporations to look at community investment as a third bottom line next to profit and employee productivity. The document also covers issues such as the importance for nonprofits of defining missions and value statements. The basic message from the document is “know yourself before approaching others.” It also emphasizes the importance of properly assessing your target organization’s credibility. However, the document suffers practically from no checklists.

- **Sectors Addressed:** Nonprofit/public and nonprofit/private partnerships
- **Special Issues Addressed:** Payoffs and pitfalls of voluntary organizations engaging in collaborative efforts
- **Case Studies:** Yes. They cover everything from partnerships from the federal government perspective to cross sector private/nonprofit partnerships
- **Templates:** No

•Canadian Centre for Philanthropy

The Canadian Centre for Philanthropy is a leading national institute promoting co-operation between government, business and the non-profit sectors. It is home to the Imagine program, which encourages business to invest in the community. The Centre has produced a number of publications designed to aid in developing collaborations, including:

Creating Effective Partnerships with Business: A Guide for Charities and Nonprofits in Canada.

The Canadian Centre for Philanthropy, Imagine Program.

This is an extensive document, focused on developing major partnerships with business. It provides valuable background on what business requires from potential non-profit partners, what kinds of resources partnerships with business can access and what is required to prepare for partnership discussions with business. The document contains numerous detailed checklists and extensive illustrations from successful partnerships. All of the material is compatible with the checklists in Working in Partnership: Recipes for Success.

- **Sectors Addressed:** Corporate/nonprofit partnerships
- **Special Issues Addressed:** Ways Businesses Offer Support, Preparing your Organization for Business Relationships and Preparing to Approach Potential Partners
- **Case Studies:** No, but numerous examples of successful Canadian partnerships are referenced
- **Templates:** Yes. For instance, there is a checklist on preparing partnership policies and guidelines in Chapter 6
- **Research Base:** Research and experience based. There are practical examples that permeate each chapter

Connecting companies to communities: a guide to the design and management of community investment programs.

A hands-on manual for companies that describes how to form community – business partnerships that are mutually beneficial. There are more than 30 examples of Canadian companies that have invested in their communities and sample policies and guidelines.

Building Foundation Partnerships: The Basics of Foundation Fundraising and Proposal Writing.

The Canadian Centre for Philanthropy annually publishes the Canadian Directory of Foundations and Grants, both in print and on-line. Building Foundation Partnerships guides you step-by-step through everything you need to know to make the most of foundations as a source of funding for your organization. This "how-to" book is filled with worksheets, helpful hints and checklists to ensure you're prepared for foundation fundraising.

- **Sectors Addressed:** Foundations
- **Special Issues Addressed:** How foundations operate and the pressures facing them; Identify sources of information for your research; Details on writing effective proposals; Specify strategies for maintaining contact with prospective foundations
- **Case Studies:** No
- **Templates:** Build a case for support structure; begin research on foundation prospects; develop background information on key foundation personnel; identify opportunities for building relationships; evaluate your proposal, and much more
- **Resource Access:** Building Foundation Partnerships is now included free as part of both the 14th Print Edition, and the online version, of the Canadian Directory to Foundations and Grants. It may also be purchased separately

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Website: www.ccp.ca

•Conference Board of Canada

For a number of years, the Conference Board of Canada has run a program designed to promote effective partnerships between business and educational institutions at all levels. As part of that program, the Board has produced a number of publications regarding the process. While the partnerships involved are restricted to business and educational institutions, many of the lessons are applicable to other partnerships. The Board's work in this area also includes a wealth of ideas that can be applied to other types of partnerships. Publications include:

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Website: www.conferenceboard.ca

Ethical Guidelines for Business-Education Partnerships

This is a short set of guidelines that are to “complement existing codes of ethics, practice and conduct.” They act as a solution to issues not addressed in those codes concerning business-education partnerships.

The guidelines are a part of a small series of publications by the Conference Board's Business-Education Partnerships Forum. Other documents include Operating Principles for Business-Education Partnerships and Evaluating Business-Education Partnerships: Value Assessment Process.

The Business-Education Partnerships Forum is a multi-stakeholder group committed to promoting ethical and effective business-education partnerships. It developed this publication in consultation with the Corporate Council on Education and more than 200 representatives from businesses, education institutions, teachers' organizations, student groups and government organizations across Canada.

- **Sectors Addressed:** Corporate/Education
- **Special Issues Addressed:** Ethical guidelines
- **Case Studies:** No

Benefits of employee involvement in Business/Education partnerships

This document does not so much relate to enacting partnerships as it is a testimonial to the effectiveness of them in the business-education realm. It provides businesses and educational institutions a matrix that they can use to determine the benefits that partnering can bring to educational development. And like Ethical Guidelines (see above), the Conference Board lists all businesses involved in the Business-Education Partnership Forum, a program of the National Business and Education Centre. Therefore, this piece may provide useful justification for non-profits seeking corporate support for educational initiatives.

- **Sectors Addressed:** Business, Educational Institutions
- **Special Issues Addressed:** Justification for business/education partnerships
- **Case Studies:** None
- **Templates:** The document contains a matrix that crosses the skills students acquire by participating in business/education partnerships

Operating Principles for Business Education Partnerships

This short publication looks at principles that business organizations should follow if they are to enter into successful partnerships with students. It is a two page document downloadable from the Conference Board of Canada's web site in a .PDF format. The first page teaches the reader how to use the kit and where it should be applied (in concert with existing codes of ethics). It also gives a brief description of the Business-Education Partnerships Forum and, like the other publications previously mentioned, lists the Forum's member organizations. It also contains a short justification for using operating principles. The second page goes into the five principles of business-education partnerships: Inception and Development, Ownership, Operation, Evaluation and Communication. Although the principles are somewhat detailed, this publication would serve more effectively as a checklist for an existing partnership than it would as a partnership-forming piece.

- **Sectors Addressed:** Business/Education
- **Special Issues Addressed:** Outlines the necessary principles in forming successful partnerships from “Inception and Development” to “Evaluation”
- **Case Studies:** No
- **Templates:** There is a list of principles organizations can follow with explanatory sub points

Evaluating Business-Education Collaboration: Value Assessment Process

This piece is more comprehensive and day-to-day than the other Conference Board publications described above. One of the kit's strengths is that it breaks down objective-setting by situation. Whether you are trying to assess organization-wide, project or local programs, this document helps differentiate between the steps one should take. Also, it contains a step-by-step list on how to bring business and education representatives together in a facilitated objective setting process. For example, under Phase 1, the document recommends initial breakout groups separating education and business personnel so each group sets those relevant to them. They are then brought together in a formal, facilitated session. The most interesting part of the document is the group of templates that allow organizations to compute ranked, current and potential values. Although somewhat cumbersome to learn from a print piece only, these templates allow for a systematic ordering of educational and business objectives.

- **Sectors Addressed:** Business/Education
- **Special Issues Addressed:** Value assessment process
- **Case Studies:** None
- **Templates:** There is an objective setting matrix along with a set of Value Assessment Process related steps that are broken down into different phases from setting and ranking objectives to assessing the value of programs. There are also templates included that are arithmetically based.

• Amherst H. Wilder Foundation

The Amherst H. Wilder Foundation is a nonprofit health and human services organization that has served the greater Saint Paul, Minnesota, area since 1906. It operates more than 120 programs that serve people of all ages and backgrounds, with a focus on low-income individuals and families, people needing support during critical times in their lives, and Saint Paul's central neighborhoods and communities. Foundation work affects the lives of 50,000 people annually.

Collaboration Handbook: Creating, Sustaining and Enjoying the Journey

(Michael Winer, Karen Ray).

The Collaboration Handbook is one of the better and more comprehensive resources available on partnership. The book is divided into the following sections: Part 1: How Do We Begin?, Part 2: How Do We Set Forth?, Part 3: How Do We Journey Together? It breaks part three down into stages, where each stage includes several challenges. For example, Stage 1: Envision Results By Working Individual to Individual contains challenges such as Bring People Together (Challenge 1A) and Enhance Trust (Challenge 1B). In addition to a wealth of bibliographic references available to the reader, Appendix C contains a variety of checklists from a "Vision and Focus Statement Form" to a "Decision-Making Protocol." Easy to read and understand, the Collaboration Handbook is a workbook that organizations can incorporate to measure whether or not they are achieving their collaboration goals.

The Wilder Foundation also publishes a companion book, *Collaboration? What Makes It Work?* (Paul Mattessich, Ph.D., Marta Murray-Close, B.A. and Barbara Monsey, M.P.H.

- **Sectors Addressed:** All sectors
- **Special Issues Addressed:** Identifying potential partners, building long term relationships, building teamwork within a partnership or a collaboration
- **Templates:** A case study following one collaboration from start to finish. Sixteen worksheets to help you solve problems, plan successful strategies, and document your progress. Special sidebars with helpful tips such as what to do at your first meeting, and how mandated collaborations can succeed.
- **Research Base:** Sources are contained in Appendix B

The Wilder Collaboration Factors Inventory

“This inventory is a practical tool for discovering how your collaboration is doing on the twenty factors that research has shown influences success. Groups that are considering collaboration can use it to see if they have what they need to succeed. They can then act quickly to shore up weaknesses and capitalize on strengths—before formalizing the collaboration, or in its early stages. Established collaborations can use the inventory to troubleshoot problems, demonstrate successes to funders, and uncover differences in how participating organizations perceive the collaboration. Consultants to collaborations can use the tool to help the collaboration assess itself and to intervene for the most effective results. The inventory takes about fifteen minutes to complete. It can be distributed to a small group of leaders in the collaborative, during a general meeting, or via mail to all members for the most complete picture. You can tally your score manually or online. The tool includes complete instructions for administering, scoring, and interpreting the results, plus a definition of collaboration and descriptions of the twenty success factors.”

- **Sectors Addressed:** All sectors
- **Special Issues Addressed:** This tool allows organizations to fill out an online form or to purchase a publication that will help them measure the success of their collaboration at www.wilder.org/pubs/collab_wmiw_inv_tool/index.html
- **Templates:** This publication includes complete instructions for administering, scoring, and interpreting one's results. It also includes a definition of collaboration and descriptions of the twenty success factors

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Fax: (651) 642-4068

Website: http://www.wilder.org/pubs/collab_wmiw_inv_tool/index.html

• International Youth Federation

Currently operating in more than 60 countries, the International Youth Foundation (IYF) is one of the world's largest public foundations working to improve the conditions and prospects for young people where they live, learn, work, and play.

Established in 1990 to bring worldwide resources to young people in need, IYF works with hundreds of companies, foundations, and civil society organizations to strengthen and "scale up" existing programs that are making a positive and lasting difference in young lives. Over the last decade, IYF and its in-country partners have helped more than 23 million young people gain access to the life skills, education, job training and opportunities critical to their success.

Contact:

International Youth Federation

32 South St., Suite 500

Baltimore, MD 21202

Telephone: (410) 347-1500

Fax: (410) 347-1188

Email: youth@IYFnet.org

Website: www.iyfnet.org

Growing your organization: Resource book for NGOs.

Pezullo, Susan. *International Youth Foundation. Baltimore, MD, 2000.*

Overall, this is a good reference but perhaps one not totally applicable to an organization looking to partner for the first time. It does a good job of outlining case studies and identifying the factors nonprofits need to consider when approaching a potential partner. However, the case studies provide little description of the steps NGOs have taken to enter into and sustain partnerships but rather look at the basic demographics of each partnering organization.

- **Sectors Addressed:** International NGOs
- **Special Issues Addressed:** Building sustainable NGOs, often through partnership with other organizations
- **Case Studies:** Yes. Chapter 5 looks at partnerships between NGOs and the private sector while chapter 6 looks at those with the public sector
- **Templates:** Yes. There are some references to the factors NGOs need to consider before entering into partnerships
- **Research Base:** Based on experiences gained by the International Youth Federation

Single Publications

Defining collaboration in the context of inter-agency relationships: An overview and an attempt at re-definition: Developed for the catalyst/connector subcommittee of the United Way of Calgary.
Agger, Niels. *United Way of Calgary. Calgary: 1994.*

This document is useful as a guide to defining various stages or types of collaboration. One of the checklists included provides a guide to the possible types of interagency relationships available to nonprofit organizations. "The Spectrum of Interagency Relationships" looks at four different relationships from contact to consolidation. This list provides the user with a useful check against its own relationships and the factors involved in expanding and making them more effective. Perhaps nonprofits will prefer a joint coordination role with another if the program is to have a limited lifespan. Or, it could look at a consolidation relationship with another organization if service delivery could be made more efficient and effective in the long-term.

- **Sectors Addressed:** Nonprofit with nonprofit
- **Special Issues Addressed:** Defining collaboration and its evolution between organizations
- **Case Studies:** No
- **Templates:** Descriptions of the different collaboration stages
- **Research Base:** Several collaboration definitions are provided by academics

Generally Accepted Practices in Non-Profit Management (*The Calgary Centre for Non-Profit Management*)

The Calgary Centre for Nonprofit Management has created Generally Accepted Principles in Non-Profit Management as “a record of effective management practices in sustainable non-profit organizations.” The document does not deal with partnerships as its main focus but rather looks at the various aspects of a sound nonprofit organization that another could look at in its due diligence process when selecting potential partners. The document is an excellent outline of nonprofit organizational needs that can be supplemented with fuller information.

- **Sectors Addressed:** Nonprofit
- **Special Issues Addressed:** Successful management practices for nonprofit organizations
- **Case Studies:** No
- **Templates:** There are checklists available on how to form an effective nonprofit governance structure and what executable functions such as fundraising need to consider to work effectively. For example, the document lists all the financial policies and procedures a nonprofit will need.
- **Research Based:** Based on the Centre's experiences consulting with Non-Profit organizations

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Website: www.thecentre.ab.ca

The Collaboration Challenge.

Austin, James. (*Drucker Foundation, Jossey-Bass, Hardcover, 224 Pages, February 2000*)

Companies are also discovering that alliances with nonprofits generate significant rewards: increased customer preference, improved employee morale, greater brand identity, stronger corporate culture, and higher innovation.

James E. Austin provides a practical framework for understanding how traditional philanthropic relationships can be transformed into powerful strategic alliances. He offers advice and lessons drawn from years of experience in numerous collaborations, including Timberland and City Year; Starbucks and CARE; Georgia-Pacific and The Nature Conservancy; MCI WorldCom and The National Geographic Society; Reebok and Amnesty International; and Hewlett-Packard and the National Science Resource Center. As the list indicates, the collaborations that Austin studied are large-scale, even global – however the lessons learned are valuable to small partnerships. Readers will learn how to:

- Find and connect with high-potential partners
- Ensure strategic fit with the partner's mission and values
- Generate greater value for each partner and society
- Manage the partnering relationship effectively

- **Sectors Addressed:** Corporate/nonprofit partnerships
- **Special Issues Addressed:** The Strategic Benefits of Alliances, Understanding Strategic Collaboration, Making the Connection, Ensuring Strategic Fit, Generating Value, Managing the Relationship, Collaboration Drivers and Enablers: Jumpstart and American Eagle Outfitters, Guidelines for Collaborating Successfully
- **Case Studies:** Timberland and City Year; Starbucks and CARE; Georgia-Pacific and The Nature Conservancy; MCI WorldCom and The National Geographic Society; Reebok and Amnesty International; and Hewlett-Packard and the National Science Resource Center
- **Templates:** Numerous check and question lists
- **Research Base:** Case study based
- **Resource Access:** \$25.00 U.S. Available through the Jossey-Bass web site at www.josseybass.com/Corporate/Website/Objects/Products/0,9049,87938,00.html

The Nonprofit Handbook, 3rd Ed.

Tracey Daniel Connors. (John Wiley and Sons Publishing, \$115.00 U.S.)

The Nonprofit Handbook: brings together more than 35 leading experts in nonprofit management to provide information and guidance on standardized policies and procedures that are applicable to virtually every nonprofit organization--and effect the three most crucial areas: Effectiveness, Efficiency, and Evolutionary Environment. Updated to include the latest developments in the field, this new edition:

- Covers such topics as management environment, organizational identity and focus, effective operating and management strategies, marketing and communications, information management technology, process management, fundraising, values, leadership, and human resource development;
- Includes sample forms, management checklists, model reports, and suggested policy statements that can be adapted to the needs of any organization;
- Applies the latest developments in business management to the nonprofit sector;
- Stays current with annual updates.

Also available as part of a two volume set along with Fundraising: Evaluating and Managing the Fund Development Process, The Nonprofit Handbook provides a foundation from which nonprofits can best manage and administer their organizations—and make their missions flourish.

This book also discusses collaborations and organizational mergers in Chapter 6.

- **Sectors Addressed:** Nonprofits
- **Special Issues Addressed:** Effectiveness, Efficiency, and Evolutionary Environment
- **Case Studies:** No
- **Templates:** Sample forms, management checklists, model reports, and suggested policy statements that can be adapted to the needs of any organization
- **Research Base:** 35 leading experts in non-profit management
- **Resource Sector Access:** <http://www.wiley.com/contact-us/0,9049,16049,00.html> and send an e-mail

The New Community Collaboration Manual.

The National Assembly of Health and Human Service Organizations (formerly known as The National Assembly of National Voluntary Health and Social Welfare Organizations). Washington, D.C.: 1997.

This is a very practical guide to collaboration from inception to evaluation. It contains very usable and distinct chapters that nonprofits can use at various stages of their partnering relationships. It is an enhancement of the original Community Collaboration Manual and many of its examples come from youth service collaborations. However, the organization feels these lessons can be applied to any nonprofit organization looking to better deliver its services to the community. The model by-laws are an interesting document. This is basically a draft of a bylaws template that allows for quick insertion of information from the nonprofit organization under question.

- **Sectors Addressed:** Youth Service Collaborations
- **Special Issues Addressed:** Partnership examples that cover different private/nonprofit arrangements including those between nonprofits and media
- **Case Studies:** Yes but within text
- **Templates:** Yes. An appendix that contains model by-laws, rules of procedure and program evaluation

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Website: www.nassembly.org

Appendix B

Wild Rose Foundation

Documentation Forms/Worksheets

Many times in a collaboration, documentation is the only proof we have that we have been accomplishing important work. The following forms, guides, and checklists help document what our collaboration is doing.

Copy the ones here and use them freely and liberally in order to:

1. Keep track of progress, both successes and learnings
2. Update inactive collaboration members
3. Plan and organize work (one funder used these forms to contract with a group about what tasks would be completed in what order)
4. Report accomplishments to supervisors, officials, and funders
5. Update records regularly
6. Create a history for orienting new members
7. Tell stories to help convince the greater community that collaboration can change systems
8. Celebrate all that's been achieved

MEMBERSHIP ROSTER Document 1A

As of (date) _____ Page ____ of ____

List the organizations involved and their representatives. Initial self-interests and possible contributions can be declared by individual/organization or summarized for all involved. How these factors are listed depends on the level of trust—the higher the trust, the more individuals can lay claim to their declarations. Update this roster regularly.

Organization <i>Representative's name, phone number, organization name and address, and type of organization (i.e. nonprofit, government, grassroots, funder, and so forth)</i>	Initial Self-Interests <i>Organizational and Personal Gains</i>	Possible Contributions <i>Powers and Commitments</i>

Membership Roster Document 1A

As of (date) _____ Page ____ of ____

Organization <i>Representative's name, phone number, organization name and address, and type of organization (i.e. nonprofit, government, grassroots, funder, and so forth)</i>	Initial Self-Interests <i>Organizational and Personal Gains</i>	Possible Contributions <i>Powers and Commitments</i>

MEETING AGENDA AND SUMMARY Document 1B

Calling the Next Meeting (send to participants in advance of next meeting)

Collaboration name or purpose:
Purpose of next meeting:
Meeting date: Location: Start and end times:
Convener: Phone:
Participants (see membership roster for addresses and phone numbers):

Action Agenda

Item	Disposition <i>For information, discussion, or decision</i>	Responsibility	Time

Meeting Agenda and Summary Document 1B

Summary of Decisions Made/Actions to be Taken

This summarizes the previous meeting and accompanies the agendas for the next meeting.

Decision Made/Action to be Taken	Responsibility	Deadline

Summary of Achievements to Date

This is a log of all achievements. It provides an excellent history and basis for evaluation.

Update it regularly.

Achievements	Responsibility	Date

VISION AND FOCUS STATEMENTS Document 1C

This document provides an excellent record of the rationale for the vision and focus statements. It also aids in achieving support from key stakeholders.

1. What is our destination—what will we achieve, for whom and where?

2. What is the scope of our effort—how big, how many, how much?

3. How is this destination unique among members of the collaboration?

4. How can we phrase the vision statement so that it is not complicated?

Our draft vision is:

5. After considering our statement, how can we rephrase it so that it is easy to understand and easy to repeat?

Our vision is:

6. Imagining that we have fifteen seconds to communicate the essence of our vision, what short phrase best captures the heart of it?

Our focus is:

DESIRED RESULTS AND STRATEGIES Document 1D

Before we proceed with this step, we need to make sure that we have accomplished the following:

- **Declared Self-Interests**
Attach or note the location of Document 1A—an updated membership roster including member’s personal and organizational self-interests.
- **Recorded Achievements to Date**
Attach or note the location of Document 1B—meeting summaries and record of achievements. Continually accumulate records of achievements.
- **Identified Our Vision and Focus Statements**
Attach or note the location of Document 1C.

We’re now ready to develop statements of our desired results and strategies.

Communal Benefits Outline what we are trying to achieve.

What are our long-term desired results?

What are our short-term desired results?

Are the results we’ve identified tangible? Can we measure them? Can others recognize them?

Desired Results and Strategies Document 1D

Key Strategies Give the key stakeholders perspectives; rate them “for,” “against,” or “persuadable.” Sequence the approach—who talks to whom, and in what order.

Key Stakeholder	Perspective	Rate (F/A/P)	Sequence

Redefined Results Now we restate our desired results integrating stakeholders’ perspectives.

Redefined long-term results:

Redefined short-term results:

Strategic Aim List specific actions to influence stakeholders.

Responsibility	Action Step	Deadline

LETTERS OF COMMITMENT Document 2A

Obtain a letter of commitment from each participating organization. Ask that the letter be on the organization's letterhead and be signed by highest authority possible. Check off the following to make sure they are included:

- Commitment to planning and an understanding that the process takes time
- Acknowledgment of the other partners and their contributions
- Commitment to the vision, focus, desired results, and strategies that have been laid out
- Statement of what the organization expects in return for participation
- Listing of the types of powers that can be committed (connections, expertise, funds, and so forth)
- Areas of authority where the representative can commit resources and act on behalf of the organization

CONFLICT RESOLUTIONS Document 2B

A record of conflict is valuable to show that progress has been made, to revisit resolutions should similar issues arise again, to evaluate accomplishments, and to keep as an historical record. Attach conflicts and their resolutions to meeting summaries or keep them with other milestone documents. Include at least the following in the record:

Date	Type of Conflict	Facilitator and Process Used	Resolutions	Healing Rituals

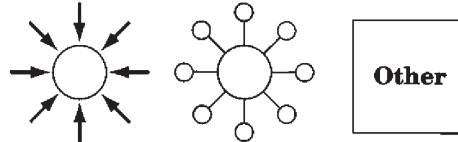
Conflict Resolutions Document 2B

Date	Type of Conflict	Facilitator and Process Used	Resolutions	Healing Rituals

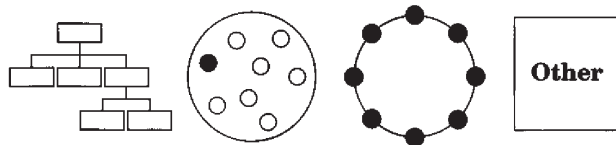
COLLABORATION STRUCTURE Document 2C

Determine how to organize to get work done efficiently. Ask: "What kinds of groups do we need to form in order to do our work? Is it critical for all of us to make all decisions, or can some decisions be made by subgroups? How much must we communicate with one another?"

1. **Structure.** Sketch the collaboration's structure—table, wheel, or other (see page 82 for more information):



2. **Level of Authority.** Decide if authority is hierarchical, individual-based, group centered, or other. Sketch how members relate to each other (see page 83 for more information):



3. **Roles.** Assign specific responsibilities to individuals, small groups, the whole group, and/or staff. Add those responsibilities to the sketch of levels of authority above.

Action Implementation Plan Document 3A

Actions to Be Taken	Who is Responsible	By When	With What Accountability	Cost
<p>Note what information will be shared with whom and who is responsible for doing so. Add this to the communications plan--Document 2D.</p>	<p>Total Cost:</p>			

JOINT AGREEMENTS Document 3B

Use this checklist to create the joint agreements between organizations:

What **degree of closeness** have all organizations agreed on for the joint agreements?
(Interagency committee, single point, lead agency, consolidation, incorporation)

What **authority** will each organization exercise?

Which **responsibilities** will each organization fulfill?

Evaluation Procedures Document 3C

Process Evaluation	Results Evaluation
<p>4. Summarize the collaboration's impact on the member organizations. What has each contributed? How did the collaboration change the way each organization does business?</p> <p>5. Note side effects. Who else becomes involved? How does that help the effort?</p> <p>6. Other:</p>	<p>4. Describe the characteristics of the community being targeted, the number and diversity of people involved, their reaction to the effort and its methods, and changes in the community that might be attributed to this effort:</p> <p>5. Note side effects. Who else becomes involved? How does that help the effort?</p> <p>6. Other:</p>
<p>Now draw some conclusions:</p> <ul style="list-style-type: none"> • What lessons have we learned? • What do we need to change or add? • What previous challenges should we review? 	

PROMOTIONAL PLAN Document 4A**1. First we ask ourselves:**

- What myths can we tell about the results we have achieved?

- What myths can we tell about how the collaboration began and evolved?

- What images (rather than explanations) do we want to convey about what we've done and who we are?

- What symbols can we use to convey those images and tell our stories?

2. Next we draft an image statement and review it with others to determine its impact:**3. Then we refine the statement.**

Our image is:

Succession Planning Document 4B

- How can member organizations enhance their internal leadership?

- How will key stakeholders in the community at large be influenced?

- Who are the potential leaders?

- How will we select, charge, and train them?

- How will present leaders let go of the reins?

- What kinds of forums can we build in the community that generate wide ownership, invite discussion, and challenge assumptions?

A GUIDE TO SYSTEMS CHANGE Document 4C

To begin to change systems, we need to answer the following questions:

- 1. What are present conditions?** Because extensive data exists in most communities, you may have little need to gather more information.
- 2. How do people address those conditions?** Bring in the perspectives of all fields: arts, human services, environment, health care, education, media, and business; and of all sectors: public, private, and nonprofit.
- 3. What is our picture of desired results?** Remember the desired picture is one of structural change, not of providing more programs to alleviate problems.
- 4. How do we map out all the interrelated parts of the system and how they are linked?** In relation to the desired results, describe the impetus for and the blocks to change in each part of the system.
- 5. What are the leverage points in the system?** Leverage points are those places to which you can apply pressure that will move the impetus for change forward and/or reduce the blocks to change. The exertion of leverage needs to have the greatest return for energy expended, so focus on those most likely to move. Often the leverage points are key individuals and organizations, but sometimes there is a community-wide perspective that must be addressed.

