# The Partnerships Analysis Tool
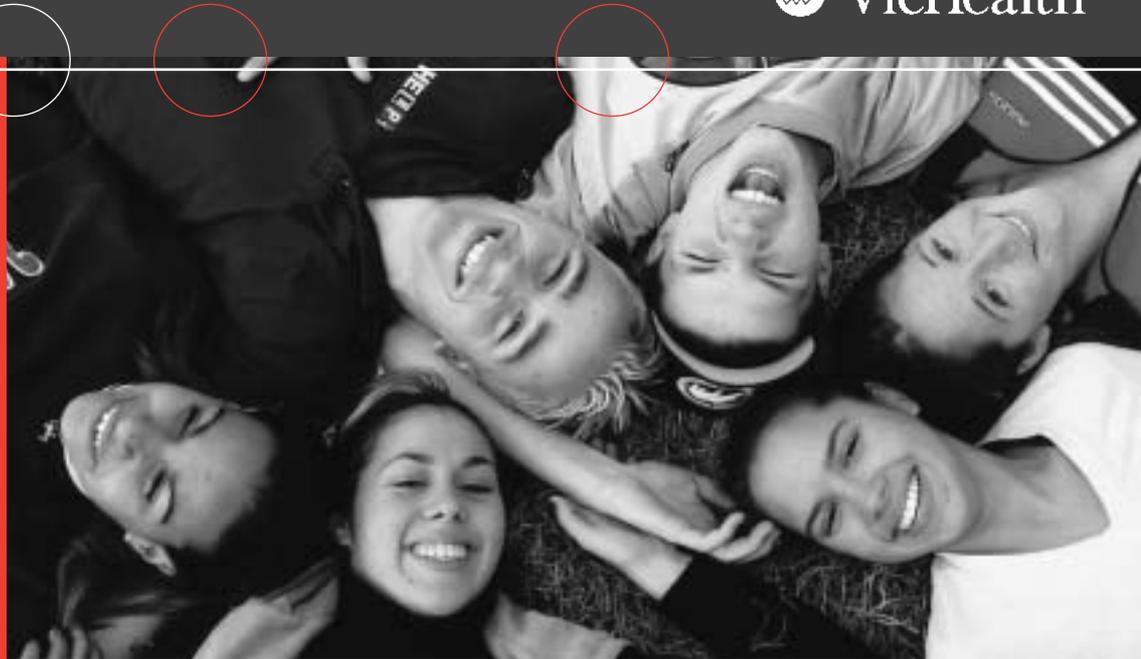
## For Partners in Health Promotion

**VicHealth**

## Supporting partnerships

Based on the evaluation of a range of initiatives funded through the Mental Health Promotion Plan, John McLeod, on behalf of VicHealth, produced *The Partnerships Analysis Tool: for partners in health promotion* to support partnerships. It provides a framework which can assist organisations to develop a clearer understanding of the range of purposes of collaborations, reflect on the partnerships they have established and focus on ways to strengthen new and existing partnerships by engaging in discussion about issues and ways forward.

## Contents

### A resource for establishing, developing and maintaining productive partnerships

The Victorian Health Promotion Foundation considers partnerships an important mechanism for building and sustaining capacity in mental health promotion. This emphasis is particularly relevant when working across diverse sectors and with a range of organisations as VicHealth has under the Mental Health Promotion Plan 1999-2002.

Partnerships are an important vehicle for bringing together a diversity of skills and resources for more effective health promotion outcomes. Partnerships can increase the efficiency of the health and community service system by making the best use of different but complementary resources. Collaborations, joint advocacy and action can also potentially make a bigger impact on policy-makers and government.

If partnerships are to be successful, however, they must have a clear purpose, add value to the work of the partners and be carefully planned and monitored.

The Partnerships Analysis Tool: for partners in health promotion provides a tool for organisations entering into or working with a partnership to assess, monitor and maximise its ongoing effectiveness. VicHealth is pleased to offer this resource and welcomes your comments and feedback.

Rob Moodie
Chief Executive Officer
VicHealth

# Assessing the Purpose of the Partnership

## What is the aim of the tool?

The aim of this tool is to help organisations involved in health promotion projects to reflect on the partnerships they have established and monitor their effectiveness.

The tool is divided into **three activities:**

**Activity One** explores the reason for the partnership. Why is the partnership necessary in this particular project? What value does the partnership add to the project?

**Activity Two** involves designing a map which visually represents the nature of the relationships between agencies in the partnership.

**Activity Three** involves completing a checklist which defines the key features of a successful interdepartmental, interagency or intersectoral partnership. The checklist is designed to provide feedback on the current status of the partnership and to suggest areas that need further support and work.

## Activity 1: How to assess the purpose of the partnership

**Activity 1** is designed to explore and clarify the purpose of the partnership. In order to complete it we suggest you adopt the following approach:

1. Have each participant write five answers to each of the following questions on a piece of paper and rank them in order of importance:

   – Why is the partnership necessary in this particular project?

   – What value is it trying to add to the project?

2. Compare individual lists by starting with the reasons that are most important and following through to those that are least important.

3. Look for the points of consensus, but also be aware of any differences.

4. Do organisations have a clear understanding of what each one can contribute to the partnership?

## How to use the tool

The tool is designed to provide a focus for discussion between agencies. Wherever possible, the activities should be completed by participating partners as a group. The discussion involved in working through the activities will help to strengthen the partnership by clarifying ideas and different perspectives. In some cases, it may indicate that the partnership is not working as intended.

Where a lead agency has initiated or is coordinating the partnership they would normally assume responsibility for facilitating the three activities.

Completing the activities will take a number of hours because there will be a variety of perspectives among the partners and different evidence will be cited as a way of substantiating the views people hold. The various stakeholders need time to reflect on the partnership and how it is working. The discussion that occurs around completing the tasks will contribute to the partnership because ideas, expectations and any tensions can be aired and clarified.

The tool can be used at different times in the partnership. Early on, it will provide some information on how the partnership has been established and identify areas in which there is a need for further work. A year or so into the partnership, it provides a basis for structured reflection on how the partnership is developing and how inter-partner relationships are forming. With longer-term partnerships, it may be worth revisiting the tool every 12 or 18 months as a method of continuing to monitor progress and the ways in which relationships are evolving.

The tool may also be useful to a lead agency as a tool for reflection when forming and planning partnerships.

# A Map of the Partnership

## Background

The concept of partnerships used in this tool implies a level of mutuality and equality between agencies. There are different types of partnerships in health promotion, ranging on a continuum from networking through to collaboration (see below).

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*A continuum of partnerships in health promotion*

*A distinction can be made between the purposes and nature of partnerships. Partnerships in health promotion may usefully be seen to range on a continuum from networking through to collaboration.*

- **Networking** involves the exchange of information for mutual benefit. This requires little time and trust between partners. For example, youth services within a local government area may meet monthly to provide an update on their work and discuss issues that affect young people.

- **Coordinating** involves exchanging information and altering activities for a common purpose. For example, the youth services may meet and plan a coordinated campaign to lobby the council for more youth-specific services.

- **Cooperating** involves exchanging information, altering activities and sharing resources. It requires a significant amount of time, high level of trust between partners and sharing the turf between agencies. For example, a group of secondary schools may pool some resources with a youth welfare agency to run a 'Diversity Week' as a way of combating violence and discrimination.

- **Collaborating.** In addition to the other activities described, collaboration includes enhancing the capacity of the other partner for mutual benefit and a common purpose. Collaborating requires the partner to give up a part of their turf to another agency to create a better or more seamless service system. For example, a group of schools may fund a youth agency
to establish a full-time position to coordinate a Diversity Week, provide professional development for teachers and train student peer mediators in conflict resolution.

Adapted from: Himmelman A 2001, 'on coalitions and the transformation of power relations: Collaborative betterment and collaborative empowerment', American Journal of Community Psychology, vol. 29, no. 2.

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Not all partnerships will or should move to collaboration. In some cases, networking is the appropriate response. The nature of the partnership will depend on the need, purpose and willingness of participating agencies to engage in the partnership.

As a partnership moves towards collaboration, the more embedded it will need to become in the core work of the agencies involved. This has resource and structural implications. In particular, collaborative partnerships require the support and involvement of senior agency personnel, since project workers may be relatively junior or on short-term contracts. This can affect their capacity to mobilise the agency resources required for collaboration.

## Working at partnerships

Working collaboratively is not always easy. Rae Walker, in her review on collaboration and alliances,[1] acknowledges the challenges and tensions created by working collaboratively as well as the importance of deciding when partnership is not an appropriate or effective strategy. Walker also describes the critical factors for successful collaboration including the need for partners to establish a process ensuring that organisations develop a shared vision and objectives. Ongoing monitoring and shared reflection of how the partnership is working is critical to strengthening and sustaining relationships between organisations and achieving effective outcomes.

**Available at**
www.vichealth.vic.gov.au

[1] Walker R Sep 2000 Collaboration & Alliances: A Review for VicHealth.

# A Map of the Partnership

## The mapping exercise

This mapping exercise is designed to place all of the partners in relation to each other. Lines are drawn between them to show the strength and nature of the relationship. Mapping the relationship is a way of clarifying roles and the level of commitment to the partnership. This is important as partners may have different understandings or expectations of what their involvement means. If done collectively, this exercise can help to strengthen a partnership because people are able to raise issues of concern. This provides an opportunity to address areas in which there is a lack of consensus.

It is interesting to note patterns in the relationships and how these change over time. Many partnerships are strong on networking and coordinating but considerably weaker on collaborating. Completing the map provides an opportunity to look at ways in which relationships can be strengthened and made more effective.

### Activity 2: Completing the Mapping Exercise

1. Look at the examples below then follow this suggested approach to complete the mapping exercise:

2. List all the agencies involved in the partnership. The lead agency (if there is one) can be placed in the centre.

3. Using the legend below, link the agencies in terms of the nature of the relationship between them. The lead agency is likely to have a relationship with all of the others; however, there may also be important links between partners that do not rely on the lead agency.

4. The strength of the links between partners should be based on evidence of how the partnership actually works rather than how people might like it to work or how it may work in the future. Where possible cite concrete examples as evidence of the strength of the coalition.

## Mapping Example

**A project to increase participation for young people at risk.**
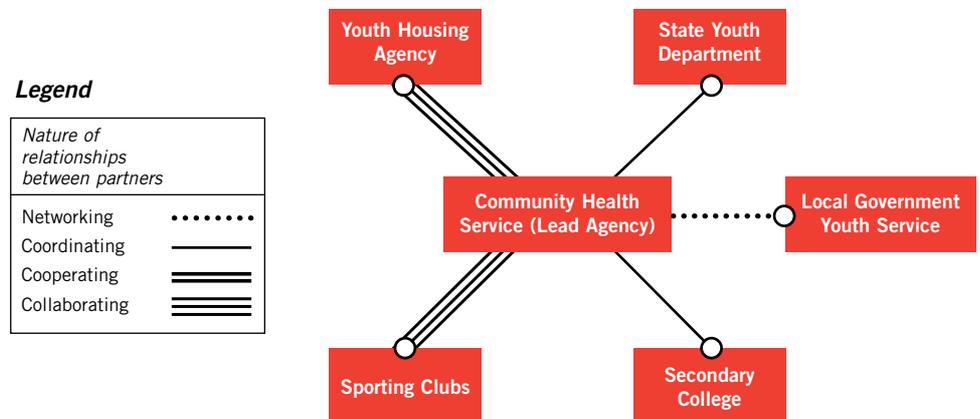


**Legend**

Nature of relationships between partners

| Networking | ∙∙∙∙∙∙∙∙ |
| Coordinating | ───── |
| Cooperating | ═════ |
| Collaborating | ≡≡≡≡≡ |

**Nature of relationships**

| Community Health Service | ➜ is the lead agency, coordinates funds and project steering group. |
| State Youth Department | ➜ provides funds for the project and requires report at completion of funding. |
| Sporting Clubs | ➜ provides sports facilities, equipment and a coach. |
| Youth Housing Agency | ➜ provides office for project workers, coordinates and provides transport for young people to travel from school to the club. |
| | ➜ provides training for volunteers, sports coaches and generalist workers about youth issues, in particular it promotes this project. |
| Secondary College | ➜ refers young people to project. |
| Local Government Youth Service | ➜ member of steering committee. |

# A Checklist for Partnership in Health Promotion

## Activity 3: Providing feedback using a checklist

In this activity, partners rank themselves against each of the items in a checklist (pages 6-7) describing the key features of a successful partnership. The checklist is designed to provide feedback on the current status of the partnership and suggest areas that need further support and work.

The questions address the major issues of forming and sustaining meaningful partnerships.

**There are three ways to complete the checklist:**

• The lead agency can fill in the checklist and present the results to a meeting of the partnership. Canvassing the various partners' views at a meeting is a way of testing out the accuracy of the lead agency's perceptions.

• Each partner can be given a copy to complete independently. They can compare and discuss the results at a meeting. This approach ensures the views of every partner are given equal weight.

• The checklist can be completed as a group activity. This approach will tend to emphasise consensus among members.

The checklist is a global measure that accepts there will be different perceptions. Consequently, there is some value in citing different examples that either confirm or test the global result. For example, most partners may be working well but one or two may be seen to be less cooperative. The 'outliers' need to be considered but they should not skew the dominant response. Similarly, a partnership may rate well against some of the key features and not in others.

**To use the checklist on the following two pages follow the suggested approach:**

1. Make copies of the checklist and, working as a group, consider each of the statements in relation to the partnership as a whole.

2. For each statement, rate the partnership on a scale, with a rating of one indicating strong disagreement with the statement and a rating of four indicating strong agreement.

3. Look at the scores in each section as this will show trends and illustrate areas of good practice as well as helping to identify aspects of the partnership in which further work needs to be done.

4. Consider aggregating the scores across the sections and using the accompanying key to establish an indication of the overall strength of the partnership. This will also provide a basis for monitoring aspects of the partnership over time. Aggregations are a gross measure; but can be good starting points for discussions about the project and the partnership.

## What use is a checklist?

Checklists act as summaries of complex actions and interactions between various stakeholders. They are valuable because they synthesise the factors that contribute to a successful partnership and direct attention to the range of issues to be considered in assessing effectiveness. They point out the things to look for and consider. They can also guide future action as well as providing a focus for reflecting on the current state of affairs.

# The Checklist

Rate your level of agreement with each of the statements below, with 0 indicating strong disagreement and 4 indicating a strong agreement.

| | Rating | | | | | |
|---|---|---|---|---|---|---|
| | 0<br>Strongly disagree | 1<br>Disagree | 2<br>Not sure | 3<br>Agree | 4<br>Strongly agree | |
| **1. Determining the need for the partnership** | | | | | | |
| There is a perceived need for the partnership in terms of areas of common interest and complementary capacity. | | | | | | |
| There is a clear goal for the partnership. | | | | | | |
| There is a shared understanding of, and commitment to, this goal among all potential partners. | | | | | | |
| The partners are willing to share some of their ideas, resources, influence and power to fulfil the goal. | | | | | | |
| The perceived benefits of the partnership outweigh the perceived costs. | | | | | | **TOTAL** |
| **TOTAL** | | | | | | |

| | 0<br>Strongly disagree | 1<br>Disagree | 2<br>Not sure | 3<br>Agree | 4<br>Strongly agree | |
|---|---|---|---|---|---|---|
| **2. Choosing partners** | | | | | | |
| The partners share common ideologies, interests and approaches. | | | | | | |
| The partners see their core business as partially interdependent. | | | | | | |
| There is a history of good relations between the partners. | | | | | | |
| The coalition brings added prestige to the partners individually as well as collectively. | | | | | | |
| There is enough variety among members to have a comprehensive understanding of the issues being addressed. | | | | | | **TOTAL** |
| **TOTAL** | | | | | | |

| | 0<br>Strongly disagree | 1<br>Disagree | 2<br>Not sure | 3<br>Agree | 4<br>Strongly agree | |
|---|---|---|---|---|---|---|
| **3. Making sure partnerships work** | | | | | | |
| The managers in each organisation support the partnership. | | | | | | |
| Partners have the necessary skills for collaborative action. | | | | | | |
| There are strategies to enhance the skills of the partnership through increasing the membership or workforce development. | | | | | | |
| The roles, responsibilities and expectations of partners are clearly defined and understood by all other partners. | | | | | | |
| The administrative, communication and decision-making structure of the partnership is as simple as possible. | | | | | | **TOTAL** |
| **TOTAL** | | | | | | |

| | 0<br>Strongly disagree | 1<br>Disagree | 2<br>Not sure | 3<br>Agree | 4<br>Strongly agree | |
|---|---|---|---|---|---|---|
| **4. Planning collaborative action** | | | | | | |
| All partners are involved in planning and setting priorities for collaborative action. | | | | | | |
| Partners have the task of communicating and promoting the coalition in their own organisations. | | | | | | |
| Some staff have roles that cross the traditional boundaries that exist between agencies in the partnership. | | | | | | |
| The lines of communication, roles and expectations of partners are clear. | | | | | | |
| There is a participatory decision-making system that is accountable, responsive and inclusive. | | | | | | **TOTAL** |
| **TOTAL** | | | | | | |

| | Rating | | | | |
|---|---|---|---|---|---|
| | 0 *Strongly disagree* | 1 *Disagree* | 2 *Not sure* | 3 *Agree* | 4 *Strongly agree* |
| **5.   Implementing collaborative action** | | | | | |
| Processes that are common across agencies such as referral protocols, service standards, data collection and reporting mechanisms have been standardised. | | | | | |
| There is an investment in the partnership of time, personnel, materials or facilities. | | | | | |
| Collaborative action by staff and reciprocity between agencies is rewarded by management. | | | | | |
| The action is adding value (rather than duplicating services) for the community, clients or the agencies involved in the partnership. | | | | | |
| There are regular opportunities for informal and voluntary contact between staff from the different agencies and other members of the partnership. | | | | | **TOTAL** |
| **TOTAL** | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| **6.   Minimising the barriers to partnerships** | | | | | |
| Differences in organisational priorities, goals and tasks have been addressed. | | | | | |
| There is a core group of skilled and committed (in terms of the partnership) staff that has continued over the life of the partnership. | | | | | |
| There are formal structures for sharing information and resolving demarcation disputes. | | | | | |
| There are informal ways of achieving this. | | | | | |
| There are strategies to ensure alternative views are expressed within the partnership. | | | | | **TOTAL** |
| **TOTAL** | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| **7.   Reflecting on and continuing the partnership** | | | | | |
| There are processes for recognising and celebrating collective achievements and/or individual contributions. | | | | | |
| The partnership can demonstrate or document the outcomes of its collective work. | | | | | |
| There is a clear need and commitment to continuing the collaboration in the medium term. | | | | | |
| There are resources available from either internal or external sources to continue the partnership. | | | | | |
| There is a way of reviewing the range of partners and bringing in new members or removing some. | | | | | **TOTAL** |
| **TOTAL** | | | | | |

### Aggregate Score

| | | | | | TOTAL |
|---|---|---|---|---|---|
| Determining the need for a partnership | | | | | |
| Choosing partners | | | | | |
| Making sure partnerships work | | | | | |
| Planning collaborative action | | | | | |
| Implementing collaborative action | | | | | |
| Minimising the barriers to partnerships | | | | | |
| Reflecting on and continuing the partnership | | | | | |
| **TOTAL** | | | | | |

### Checklist Score

| | |
|---|---|
| 0–49 | The whole idea of a partnership should be rigorously questioned. |
| 50–91 | The partnership is moving in the right direction but it will need more attention if it is going to be really successful. |
| 92–140 | A partnership based on genuine collaboration has been established. The challenge is to maintain its impetus and build on the current success. |