



Connecting the Dots

A Partnership Development Guide

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What is a partnership?

In this guide we define partnership as *an agreement between two or more parties to invest in a common goal or objective*. It implies the sharing of resources (such as people, money, space, or equipment), work, risk, responsibility, decision making, power, benefits and burdens. Partnerships can involve few or many partners, be formal or informal, and can last a short time or be permanent.

Partnerships can be with:

- Other non-profit or community groups which share a strong commitment to a joint goal.
- The private sector, such as businesses that may want to support social causes and work with you to achieve common goals.
- Government agencies – Today, governments at all levels regard organizations they fund and work with as partners rather than clients. The accountability required by government means that partnering with them involves some bureaucracy and formality.

Partners do not have to make equal contributions to a partnership – some have more resources than others – but the expectations about the sharing of responsibilities, resource contributions and decision making must be clear.

Why should you partner?

It is often possible to do things in a partnership that might not be achieved alone. When you have groups with different views, resources and skills applying their intelligence and strength to solve a problem together, the result can be like the work of superheroes. One person alone cannot pick

up a car, unless they are a superhero, but 20 or 30 people can do it easily. Similarly, groups of organizations can often figure out ways to get the necessary skills, funds and time to solve community problems.

Through working with other complementary organizations you might:

- develop more complete or creative strategies to solve difficult problems;
- develop wider public support;
- minimize duplication of effort;
- increase the chances of attracting funding or needed expertise;
- share the workload;
- have better use of resources – do more with less (although often this is not the result);
- develop understanding, respect and stronger relationships within the community.

One plus one often adds up to 5 or 6 when community groups partner with each other. However, partnerships set up only to access funding or other resources are rarely healthy - you also need a genuine desire to work together.

What is the downside of partnering?

Partnerships are not for everybody nor are they always the best way to accomplish your goals. They are a tool and you need to determine if the benefits of the tool outweigh the costs. The partnership must contribute to achieving all partners' objectives, not just your own, or a partner will not stay. You must be clear about each organization's objectives and ensure they are totally compatible or be able to reach a compromise that would satisfy each partner.

Organizations can also have different cultures or ways of working together. You will have to be open to doing some things differently. One of the most effective ways for you to work on community economic development and employability projects may be to work with francophone organizations with similar mandates but this might introduce challenges associated to language and culture which will have to be bridged.

Developing effective partnerships is not quick and easy. Trust and joint ways of working must be built and this takes time, effort and patience and can slow down your progress at the beginning. Some energy that might otherwise be spent contributing to the objectives will have to be diverted to partnership building. Greater diversity among the partners being from different sectors (government, business, non profit) is great for creative problem solving but it can take longer to figure out how to work together. Even scheduling meetings can be difficult if you partner with larger organizations with professional staff; they may want to meet during the day which may not work for volunteers with jobs.

Although partnering may allow you to qualify for a grant, usually the funding will not cover the administrative costs associated with working with other organizations.

Conflict is also inevitable in a partnership and you need to be prepared to resolve conflict. You should also be aware that partners don't need to agree on everything, but it is essential to find enough common ground to achieve mutual objectives.

Is this the time to partner?

To decide, you need to ask the following questions:

- What is our vision, mandate, goals, priorities?
- What strengths do we have?
- What weaknesses or challenges do we have?
- Do we need funding, access to grant or funding programs, credibility, facilities, access to volunteers, contacts, skills or expertise (such as communications, problem solving, leadership, technical, accounting, or proposal writing)?
- Do we represent all aspects of the community we wish to serve or do we lack diversity?
- Would partnering make us more likely to succeed in meeting our objectives?
- Are we prepared to take the time and do the work necessary for partnership building, to share our information and to give up some control? Are we prepared to share the credit for our successes? Will the benefits of a partnership outweigh the costs of the resources it will consume?
- What do we have to offer that potential partners would value (knowledge of the issue, community presence, contacts, skills)?

Sometimes it can be useful to start small and do some easy things together to see how well you work together before committing to a partnership.

Who should you partner with?

The natural urge is to reach out to people and organizations you already know but it is better to stop and clarify what you need from a partner to help you achieve your goal (skills, credibility, funds) and who would not be acceptable partners

Identify all possible organizations with a similar interest who could help your goal.

- Non-profit organizations or community groups with similar mandates or goals; this could include Chambers of Commerce, labour organizations, service clubs and church groups.
- Businesses which could make donations of money or goods, or assist with cause-related marketing, event sponsorship, special projects or employee volunteer services.
- Government departments which have funding programs and expertise in areas such as education, community and social services, labour, citizenship and culture, agriculture or rural development and fisheries.
- Local media to help you publicize your initiative.
- Professional facilitators who could help you to run community meetings or work with other partners.
- Francophone organizations with a Community Economic Development or employability focus which may have better access to Quebec funding or grant programs.
- Organizations in neighbouring communities which share similar issues.
- Community leaders who may be too

busy to become a partner but might help to get started and introduce you to useful people.

- Representatives of the group(s) you wish to serve (e.g. youth, unemployed)

CEDEC staff know both the community and government structures well and might be able to suggest possible partners.

When you have a complete list of possible partners, create a short list:

1. Identify which organizations or people best match your needs and fit with your goals
2. Put yourself in their shoes; would they really want to partner?

Quebec Situation

In Quebec, opportunities for partnering exist at both the federal and provincial government levels as well as at the regional and local level. At the federal level there are several key [departments](#) that support the English community through Sections 41 and 42 of the Federal Government's Official Languages Act. Some departments have regional and local offices to assist different groups with resources to develop partnerships.

For the Quebec government, funding can be accessed - through le [Secrétariat à l'action communautaire autonome et aux initiatives sociales](#) (SACAIS) (or Secretariat for Independent Community Action for Social Initiatives) This is the major source of funding in Quebec for community-based initiatives. You can review how funds in this program have been spent by [department \(sector\)](#), [region](#), [organization](#) etc. There are also opportunities at the regional level. There are 21 regional groups that bring together representatives from the MRCs (la Municipalité régionale de comté) and Mayors of small municipalities to discuss community development issues.

To have a full understanding of these opportunities at the federal and provincial level, [CEDEC](#).

3. Identify who would help you reflect the diversity of your community
4. Identify if you can accept some of the disadvantages that come with each organization – for example, are you prepared to meet the documentation and reporting requirements of a government department?

When you have a short list:

1. Make informal contacts with potential partners to find out their interest or organize a group to discuss:
 - Overview of the issue or problem.
 - What do we need to understand about this issue?
 - What are the barriers to effectively resolving/addressing this problem?
 - How do the organizations work on the issue? What is their vision/mission?
 - How can we address the barriers as a group?
2. communicate in a language they will understand and focus on what they may want to achieve.
3. Be sociable.
4. Encourage ideas from your potential partners.
5. Be open and honest.
6. Focus on seeing if you can find common ground.
7. Identify the partners who also want to work with you.

Getting started – Developing an effective partnership

There is no recipe for creating successful partnerships. Each partnership is unique and the partners need to work through the issues together. Do not assume that a person interested in a partnership understands what being a partner will demand of them. Some partners will want to focus on good process – taking time to build trust and thoroughly deliberate each decision; others will prefer to focus on getting quickly into

action. Some will think big, while others may want a more narrow focus. What is important is to find a balance and to forge a path that everyone can support. Your partnership will evolve at its own pace.

However, there have been many studies done on partnerships and there are some approaches which are common in success stories.

Leadership - Ensure you have a leader with a strong vision and the ability to motivate others who is committed to seeing the partnership through its initial stage; if not, try to recruit someone. Who will be the relationship manager for each partner?

First meetings - First impressions mean a lot. Pay attention to the first few meetings and activities and keep positive with a focus on what you can do rather than what you are not sure about. Take time to build trust and respect.

Purpose – Establish the purpose of the partnership, your mutual mission, vision, the outcomes you want, and what each partner is committing to the partnership.

Alignment - Understand each other's mission and goals and how they will be served by the partnership. Are the cultures compatible? What benefits will each partner get (recognition, connections, inclusion, influence, good will)? It is important for each organization to maintain its own identity and culture and to acknowledge their partners' interests. How will partner contributions be measured? Are there other areas where the partners may be in competition for funding?

Partnership duration – Is it short-term or ongoing? If short-term, establish start, end, milestones, reporting requirements, and a time to review the partnership.

Co-Managing the partnership - Determine:

- Who is accountable for results and for reporting?
- How will decisions be made - majority rule or consensus, inclusive and participatory?
- How often to meet.
- How much advance notice the partners need for meetings.
- If there is a need for subgroups or committees.

- How partners will share responsibility for organizing and leading meetings.
- Who prepares and contributes to the agenda.
- What ground rules you want related to: participation, discussion, confidentiality, constructive feedback, and expected time commitments.
- Role of representatives.
- How partners will handle logistical arrangements.
- How expenditures will be tracked.
- What records are required – financial, meetings, work plans, events affecting the project, evaluation information e.g. statistics).

Communication – Is there respect and trust? Is communication open, frank and constructive or positive? Do all partners listen to each other so the other feels heard? Do you need to build communication skills?

- Define communication processes among partners. How frequently will you meet or teleconference? How will information be distributed?
- How often should you discuss how the partnership is working – allowing time to share grievances and praise?

Effective meetings need:

- An agenda that allows time to discuss each issue.
- To start and end on time.
- Materials circulated in advance.
- Assignment of who is responsible for carrying out each decision and deadlines for completion.
- A record of decisions or minutes to be kept to provide info for reports, evaluations and to avoid misunderstandings.

- Define communication processes with community –who will speak to media?
- Define conflict resolution process – expect problems and disagreements and plan for dealing with it. How will disagreements be resolved?

Workplan – This is the road map for your initiative. Define objectives and activities and who will do what and when so everyone will be clear and committed to action and the schedule. If you can, start with a few early winners, some simple short-term tasks that will create a sense of accomplishment while learning to work together.

Resource requirements - What resources (financial, expertise, staff, equipment, office space, training, technology) are required and who will provide them? How available are each partner’s staff or volunteers? If grants or funding is required to move forward, who has the contacts and expertise in proposal writing?

- Did we achieve our goals? If not, why not?
- What changes occurred because of our initiative?
- Do community members feel the initiative was useful?
- Did staff, volunteers or, community members learn new skills?
- Are the outcomes worth the time, money and effort put into it?

b. Process

- Do partners review goals and outcomes?
- Are all the steps in the workplan being done and according to schedule?
- Is the project within budget?
- Do performance measures need to be revised?
- Did we learn from our missteps and failures?
- Do partners raise concerns or issues in a timely way?

Celebrate every success – Celebration helps keep everyone committed

- Use the power of positive feedback – never miss a chance to let people know they’ve done something worthy and valuable to the partnership.

What is in a work plan?

- Clear measurable goals.
- Clear steps to reach each goal.
- People responsible for each step.
- Start and end dates for each step.
- Resources needed for doing steps.
- People who will approve or report on steps.
- Timetable for meetings to review progress.
- How you will collect information.
- How you will make sure steps get done correctly and on time.
- When and how you will report on progress and achievements.

Do you need to formalize the partnership?

Partnerships can be sealed with a handshake, an exchange of letters, a written agreement or letter of understanding, or a contract. If a lot of money, legal liability, copyright or intellectual property issues are involved, you need legal advice before drawing up a contract. Most often a written agreement is recommended and should include many of the issues hammered out in your early meetings. An

agreement affords all players protection by stating the important expectations and is especially important in the event that problems or issues arise. Include:

- purpose, scope and measurable objectives of the project/partnership

Evaluate project results

- What is success? Will we know it when we see it? How will we measure it?
- a. Outcomes

- roles and responsibilities
- financial obligations
- implementation and milestones
- reporting mechanisms
- benefits to each partner
- duration of agreement
- evaluation procedures
- dispute resolution mechanism, and
- a method of termination.

although in the rest of Canada national refers to the Government of Canada).

- Municipalities
- Foundations
- Private sector

Requesting funding

If you need coffee or doughnuts donated, a phone call or visit to a local business may be all you need to make your request. Before making the contact, you will need to be prepared to explain what your organization is about, its vision, the nature and benefits of your current project, and your specific needs.

If you need money, then likely you will need to write a funding proposal or complete a funding application form. Governments and large foundations are usually bureaucratic, can have rigid funding schedules, detailed application requirements and they can take a long time to make decisions. Before applying, you need to understand



Partnership Agreement

Are you looking for funding?

If you need funding (or donations of goods and services) for your initiative, CEDEC staff can assist you to identify appropriate funders. If you are a new organization without a track record of successful projects you will likely also need a sponsor or an established organization to manage funds for you and the CEDEC can suggest those as well. For example, [CEDEC](#) is one possibility of a financial trustee that can help unincorporated bodies to manage funds for a community-based project.

Funding Sources

The most likely sources of funding would be:

- Federal government departments with an interest in community economic development or employability - through either a head office or a Regional office in Quebec.
- Provincial government departments with an interest in community economic development or employability (note: in Quebec, this level of government is often termed “national”

Know about your funder:

- Name, address, telephone and fax numbers, e-mail address, contact person’s name and title. (from the switchboard or web page).
- The goals, mission and concern of the funder, including its areas of interest and funding criteria. (web page).
- Usual size of grant.
- Their decision-making process - when can you expect a decision?
- The deadlines for submission of proposals?
- Application or proposal format requirements and guidelines.
- What reports will the funder want during the project? What information will you need to collect for them?

Know yourself

- Who you are, what your identity is – your vision, goals, structure, membership.
- What your strengths and weaknesses are, and what opportunities and threats confront you.
- Your track record (what you –your organization or individual members- have achieved in the past that will give a funder confidence that you are a “good risk.”).
- If you don’t have a track record, what credible sponsors or patrons might be willing to write letters of support for you?
- Do you meet the funding criteria?
- Do you have the skills to make the application or can you access them?
- Do you need another partner?

what the funder wants in terms of goals, target populations, and concerns and also what their requirements are in terms of information requirements, format and timing. There must be a good fit to make it worth proceeding.

Allow several weeks to prepare for and complete the funding application or proposal. You will need to persuade the funder to give your project money. You need to present yourself as a sound, accountable organization, competent to achieve its objectives. For more information about proposal writing there are several references [listed here](#).

Most large funders will have application forms and guides to assist you in completing them. The types of information you may be asked to provide include:

- Information about the organization
 - Contact information for the organization and contact person - name, address, phone number, email address, etc.

- Membership of your board of directors and executive– names, titles, date elected or appointed.
- Your mandate (attach constitution and bylaws).
- Geographical scope – local, regional, provincial.
- Incorporation status – date and certificate of incorporation if you are incorporated.
- Charitable status – registration number and date if you have charitable status.
- Budget and Financial Statements.
- Affiliation with other organizations.
- Information about the proposed program, project or activity:
 - Name of project.
 - Duration.
 - Description – from a few sentences to a page:
 - Links to program funding criteria – as outlined in the application call letter.
 - Activities and what problem they are addressing.
 - Expected outcomes over the long term.
 - This year’s expected results and performance indicators.
 - Schedule.
 - Forecast of expenses and requested funding.
 - A list of other persons or partners, with contact information, who are supporting the project and in what way – attach letters confirming financial support or in-kind contributions, contracts and signed agreements.
- Authorized Signature with proof of authorization.

Reporting to funders

Your funders will want to know how you spent their money and will likely specify how often and in what format your reporting should be provided. You need to set up your record keeping system at the beginning to make it easy to provide this information. Often the funder will want you to report on the contributions of each partner including financial,

space, staff time and volunteer time. You may have to put a dollar value on non-financial contributions. A tool to help you value the time of your volunteers can be [found here](#).

What does it take to maintain a partnership?

Spend the time to make the partnership work – the care and nurturing of a partnership does not happen by accident. You need to keep paying attention to all the areas identified in developing an effective partnership noted previously. Some key points:

- Keep the vision/goal of the partnership in focus.
- Nurture trust, open communication and respect so the group will maintain the ability to work together and to adapt to emerging issues.
- Maintain committed leadership to navigate the challenging waters of working together and keep enthusiasm high.
- Keep the organization's plan current - a good road map will ensure activities are strategic and focused.
- Meet commitments.
- Celebrate success together - Monitor and measure progress, accomplishments and short-term victories.
- Review how the partnership is working for each partner on a regular basis. Allow the partners to share grievances and praise. Adapt your agreement if necessary.
- Deal with conflicts as they arise.

How is the partnership performing?

Not all partnerships need to survive. Partners should evaluate the situation regularly to see if it is effective and if it should continue. The partners should ask:

- Is everyone still committed to the shared vision?
- Are the goals of each partner being met? Should the measurable goals be changed?
- Is the partnership being managed effectively?
- Are the partners comfortable with the information flow?
- What has each learned from the experience?
- Have the partners been flexible enough to respond to changes in the agenda?

- How well have conflicts been handled? Are new skills needed?
- Is it time to dissolve? Should one partner take over the project? Should the initiative be ended? How can the partnership end while maintaining respect for each other?
- Do you want to expand the partnership, increase your commitment, or add partners? Do you want to form a more permanent organization? (see section below)

Things have gone well; do you want to form a more permanent organization?

You have been successful working together and your individual visions are in complete alignment. You are considering a merger or forming a permanent organization. What form should it take? Your options are either a charitable or a non-profit organization.

The Canadian Revenue Agency defines a non-profit (or not-for-profit) as a club, society, or association that's organized and operated solely for social welfare, civic improvement, pleasure or recreation, or any other purpose except profit.

You can incorporate your organization either provincially or federally and the process is much the same as it is for incorporating a company. Without incorporating or registering, your organization will not be legally recognized as a non-profit, nor will your group's name be protected against use by other legal entities. To get started you would need to:

- Do a name search to ensure it is unique.
- Apply for a certificate of incorporation.

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- Select individuals to serve on the board of directors.
 - Develop vision and mission statements.
 - Establish bylaws and board policies.
 - Open a bank account and establish cheque signing procedures. Non-profit organizations are exempt from income tax, provided they are established and operated exclusively for non-profit purposes. However, they must file an income tax return.

CEDEC Identity Statement

In communities across Quebec, CEDEC shares its experience in planning and developing partnerships with the aim to strengthen local economies and employability of the English-speaking and broader community.

Below are links to government web pages that deal specifically with nonprofit incorporation.

[Canada Revenue Agency](#)

[Revenu Quebec](#)

[Non-profit organizations and taxation](#)

[Quebec Enterprise Registrar](#)

[Creating a Non profit Legal Person Guide](#)



For more information, or assistance, developing partnerships related to community economic development and employability, please contact CEDEC - www.cedec.ca.

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