INVERCLYDE PARTNERSHIP TOOLKIT

Guidance for assessing, developing and promoting effective partnership working in Inverclyde

This toolkit has been developed from the Mid Devon District Council Partnership Toolkit

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INTRODUCTION

Inverclyde Council through the Inverclyde Alliance is committed to working in partnership and to improving the way we work across the whole family of partnerships in Inverclyde.   There are already a wide range of toolkits tin existence that can be used to add value to partnership working. This toolkit draws from existing good practice and points to a number of appropriate methods to assist partnerships in Inverclyde assess their effectiveness and identify areas whey they need to improve performance.

Partnership working is complex. There are different types of partnerships, for example, statutory strategic partnerships, service delivery partnerships and more informal partnerships. Partnerships may involve public and private organisations as well as the voluntary and community sector. There are also different stages within the life cycle of a partnership.

As mentioned, partnership working is complex and can take up significant time and resources – Partnership working does cost.

For these reasons it is important that partnerships function and deliver the desired improvements and outcomes. This toolkit looks at some of the basic elements of partnership working, offers practical hints on what to do at different stages of a partnerships life cycle, a framework for assessing and improving performance and a process for reviewing partnership working. Its use is encouraged by both Officers and Members to help them in their work with partnerships and as the basis for evaluating the Council's involvement in Inverclyde partnerships.

1 PARTNERSHIP BASICS

1.1
Why work in partnership?

There are many good reasons for working in partnership. However, partnership working can take up a huge amount of time and energy. Before entering into a partnership it is important to know what difference the partnership is going to make. It may be useful to establish the strategic/operational advantages that will be accrued by forming a partnership.

Partnerships can help to:
 • Develop a strategic vision across different organisations and different sectors
 • Develop a joined up and co-ordinated service to local people
 • Identify overlaps and avoid duplication
 • Enhance local democracy by actively involving communities, businesses and the voluntary sector
 • Bring in external funding for shared priorities
 • Tackle cross-sectoral issues and issues too big for any one organisation to tackle on their own e.g. social deprivation
 • Share good practice and communication between organisations on issues of mutual interest
 • Achieve outputs greater than the sum of the individual partners

However, partnerships sometimes exist only because of external pressure. This may come from:
 • Government and statutory requirements
 • External funders
 • Rising public expectation

Even if a partnership is set up primarily because of outside pressure, it is still important that the partnership delivers what it sets out to achieve and adds value to the work of individual partners

In assessing the value of partnership working, Elected Members and officers need to be sure that the benefits of partnership working are fully realised and the cost in terms of time and resources is proportionate to the benefits gained.
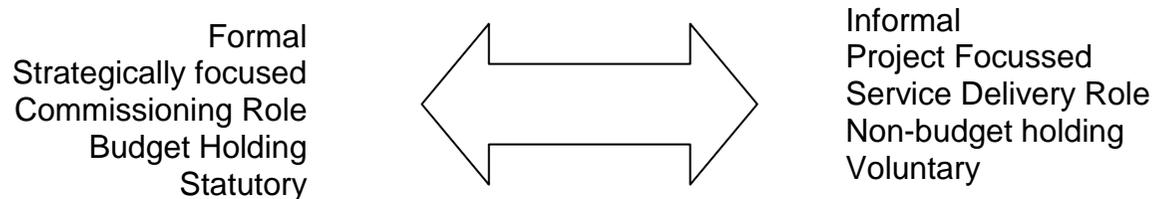
"Together we can do more than we can do alone"

What is a partnership?

There are many types of partnership ranging from informal networking groups to formal statutory partnerships. The Audit Commission in England describes a partnership as:-

"A joint working arrangement in which the partners:

- are otherwise independent bodies
- agree to co-operate to achieve a common goal
- create a new organisational structure or process to achieve this goal, separate from their own organisations" [1]

Beyond this basic definition every partnership is different, depending on why it was set up and how it functions. In order to differentiate different types of partnerships it can be helpful to see where they lie in relationship to the following factors:

Formal   Informal
Strategically focused   Project Focussed
Commissioning Role   Service Delivery Role
Budget Holding   Non-budget holding
Statutory   Voluntary

Broadly speaking there are three types partnerships

Strategic Partnerships	• Looks at strategic issues • May have a commissioning role • May have a budget or have access to funding • May be statutory or voluntary	e.g. Inverclyde Alliance
Steering Groups / Service Delivery Groups	• Administers or manages a project or joint initiative • Has a budget that must be used on the specific project or initiative	e.g. Outcome Delivery Groups Community Engagement Network
Networking Groups	• Primarily for the exchange of information • Does not deliver a service • Does not usually have a budget	e.g. Information Sharing Network

[1] Audit Commission 1998 "*A fruitful partnership: effective partnership working*"

Partnership Life Cycle

This toolkit uses the idea of a 'partnership life-cycle' to identify the stages through which partnerships tend to travel. Depending on which stage the partnership has reached will indicate which tactic is most appropriate for ensuring progress and success. This illustration can be used to identify the partnership's stage in the life cycle.

Characteristics of each stage

Forming: Start-up phase. Common cause arising from shared interests, opportunities, threats, early enthusiasm
(see section 2)

Frustration: Partners feel in a 'fog', doubts about what each partner brings
(see section 3 to identify what's going wrong).

Functioning: Mature phase. Clear vision and focus. Clear roles and responsibilities.

Flying: Successful achievement of partnership goals. Trust and respect. Partnership serving purpose.

Failing (or floundering):   Disengagement, lack of commitment, breakdown in relations (see section 5).

It is important to be aware of the issues at each particular stage of the life-cycle and regularly review how the partnership is doing. More information about the stages of partnership life-cycle is available at http://www.lgpartnerships.com/resources/learn-part.asp .

2 SETTING UP A PARTNERSHIP

What is the Partnership's Purpose?

At the beginning of a partnership it is important to get the foundations right. The first basic element is to be clear about the purpose of the partnership. Try answering the following questions to see if you can identify why there is a need for a partnership.

Q: What is the partnership trying to achieve?	**A:**
Q: Why is a partnership the best way of meeting this need?	**A:**
Q: What added value will the partnership provide?	**A:**
Q: What will the partnership deliver?	**A:**

If you can answer all these questions with clear and substantial answers then there may well be a case to set up a partnership.

Laying Down the Foundations

Once you are certain there is a need for the partnership to exist, it is important to lay out how it is going to work and how it is going to be governed. These should be written down in the partnership's governing documents. See Inverclyde Alliance Memorandum of Understanding. Public bodies in particular have a duty to make sure that there good governance arrangements in place for the partnerships they are involved with. Good governance arrangements promote good internal accountability between partners and better external accountability to service users. However, the governance arrangements need to be proportionate to the responsibilities and risks involved in the partnership. Creating too rigid and onerous a structure can be as problematic as insufficient structure and clarity over roles and responsibilities.

There is no-one-size-fits-all model for governing partnerships. Governing documents need to be appropriate to the size and function of the partnership.

- An **Informal Networking Group** may well only need a simple terms of reference outlining its main purpose and functions.
- A **Formal Strategic Partnership** should have a comprehensive partnership agreement (or protocol), laying out in more detail the roles and responsibilities of each of the partners and how the partnership/Memorandum of Understanding is going to function. Appendix A gives an outline of the key elements of a Memorandum of Understanding.
- A **Service Delivery Partnership** will probably need a more detailed legal contract or some form of Service Level Agreement (SLA) to ensure that all legal elements are covered.

As a rule of thumb, the more responsibilities the partnership has, or the larger its budget the more detailed the governance documents need to be. Partnerships which are set up as limited companies or charitable trusts will have their own legal requirements for governance purposes.

Building Trust

Successful partnerships recognise the need to develop trusting relationships between partners. When a partnership is first set up it can be helpful to set time aside to allow partners to get to know each other. Understanding and respecting the differences between partners can be just as important as agreeing with each other. Developing the partnership arrangements in an agreement can be a good way of starting this open dialogue, which develops into trust. Remember, a partnership agreement is only as good as the discussions that went into putting it together.

Relationships are not easily forged around a meeting table – create other opportunities for partners to interact and build a supportive network. Partnership working is not easy and sometimes relationships can break down. It is important to deal with discord and dissatisfaction promptly. It is certainly much easier to get over difficulties if time has been given to building relationships in the first place.

If trust has been identified as an issue for improvement the following tool may help:
Smarter Partnerships - http://www.lgpartnerships.com/resources/tools.asp - This links to a checklist for effective working relationships and suggestions for ground rules to help strengthen partner relationships.

Other Sources of Information

How to build a partnership - http://www.renewal.net/toolkits/BuildPartnership/

3 ASSESSING PERFORMANCE

There are several key features of a healthy, successful partnership. These are set out in an assessment framework, which can be used at any stage of a partnership's life-cycle to review how the partnership is performing and to identify areas for improvement. Use the Quick Assessment Tool on page 9 to give a quick picture of how the partnership is doing. This should be done regularly, whether a partnership is at the frustrating or functioning stage, to make sure it is staying on track. It is recommended that the Quick Assessment Tool checklist is done by all partners, perhaps at a meeting, and the results shared to give an overall picture of the partnership's performance. Different perceptions of how a partnership is doing can be just as telling as broad agreement.

The fuller assessment framework and associated standards are set out in Section 4 Going Deeper – Improving Performance.

QUICK ASSESSMENT TOOL

Features of a Successful Partnership

	Yes	Yes, partially	No

Direction & Leadership

	Yes	Yes, partially	No
2.			
• The partnership has a clear purpose and an agreed vision of what it wants to achieve			
• There is clear leadership within the partnership & partners have trusting collaborative relationships			
• There is a clear structure with appropriate governing documents and financial & legal controls			

Organised to Deliver

	Yes	Yes, partially	No
3.	4.	5.	
• It has an effective structure which is able to make decisions and deliver outcomes			
• There is adequate administrative and technical support			
• It is sufficiently resourced to deliver outcomes			

6.

Action and Outcome Focused

	Yes	Yes, partially	No
7.	8.	9.	
• It effectively uses statistics and feedback from consultation to inform its decisions			
• There are clear priorities with a comprehensive action plan			
• It can prove it is making a difference			

Effective Performance Management

	Yes	Yes, partially	No
10.	11.	12.	
• There is good performance management with SMART targets and performance indicators			
• All actions are owned, with clear responsibilities and lines of accountability			
• Partners deliver what they have signed up to do			

Inclusive Approach

	Yes	Yes, partially	No
13.	14.	15.	
• Membership is representative of the full range of stakeholders			
• There are rigorous processes to engage with beneficiaries			
• The partnership actively promotes equality			

Committed to Learning and Development

	Yes	Yes, partially	No
16.	17.	18.	
• The partnership learns from good practice and feedback from stakeholders			
• It develops skills and expertise of partnership members			
• It regularly evaluates and adapts to a changing environment			

4 GOING DEEPER – IMPROVING PERFORMANCE

The following section provides more information and guidance about the features and standards that make a successful partnership. You can use this section to help you identify actions to improve the performance of the partnership. As well as the self-assessment tool, there are sections on good practice with spaces to jot down any ideas and actions needed to take improvement forward. The notes include pointers to other web-based resources which may be of use in strengthening your partnership.

In order to move improvement's forward you will need to create an Improvement Plan with enough detail to make sure that the actions identified will actually achieve the improvements needed. Use the template opposite or something similar to develop your Improvement Plan.

18.1.1
Key Features of a Successful Partnership

Direction and Leadership

Organised to Deliver

Action and Outcome Focused

Effective Performance Management

Inclusive Approach

Committed to Learning and Development

Improvement Plan

Standard	Action Needed	Intended outcome	Resources required	Responsible person / group	Deadlines
18.2					

Direction & Leadership

The partnership has a clear vision, strong leadership and partners harness their energies to achieve more than they could on their own

	Yes	Yes, mostly	Yes. partially	Very little	Not at all	Points to Consider
1. Does the partnership have a clear purpose and an agreed vision of what it wants to achieve?						• Are all members of the partnership clear about what it is trying to achieve? • To what extent has the vision been developed through consultation with all relevant stakeholders and with local communities? • How well has the vision been developed into clear objectives and priorities that are both robust and realistic?
2. Is there clear leadership within the partnership?						• Is the vision owned and agreed by all partner organisations? • Is there a partner that takes a lead in championing the effective working of the partnership?
3. Are partners committed to working together towards the shared vision?						• Do partners have good, collaborative working relationships? • Does partners' commitment translate into a willingness to share resources, show flexibility & overcome problems together?
4. Is the partnership aware of the wider context within which it operates and does it have clear links and relationships with other relevant partnerships?						• Does the partnership understand the links and relationships with other local & regional partnerships? • Are there good lines of communication between the partnership and other relevant partnerships and organisations? • Does the partnership take into account relevant national, regional and sub-regional developments and strategies? • Does the partnership avoid duplication by working with other partnerships?
5. The partnership has documented governance arrangements with proper financial and legal controls?						• Does the partnership have appropriate governance arrangements appropriate to its size and responsibilities? • Does the partnership have a governing document which details all relevant roles and responsibilities? • Are there detailed financial and legal controls?

Vision

A common vision and a clear sense of purpose are central to the success of partnership working. Without these, a partnership should not be operating. There are several tools that can help partnerships develop a vision and SMART objectives.

Ten steps to SMART objectives: http://www.natpact.nhs.uk/uploads/Ten%20Steps%20to%20SMART%20objectives.pdf
Creating Healthier Communities (p97 onwards): http://www.neighbourhood.gov.uk/publications.asp?did=1382

Clear Leadership

Effective partnerships require a driving force. The most successful partnerships usually have a collaborative ethos rather than being dominated by an individual organisation. Commitment from all partners to the agreed vision can often provide the driving force necessary to lead the partnership. It may be necessary for one organisation to take a lead role without dominating. Problems can arise when leadership is weak. It is therefore important to address this issue if it becomes a problem. See the following resource if you think leadership is a problem: Smarter Partnerships - http://www.lgpartnerships.com/resources/tools.asp

Being Connected

The local partnership landscape is very complex, with a number of different partnerships operating at county and district level. These partnerships vary in size, membership and function. Partnerships are expected to be aware of the wider context within which they are operating and make links to other partnerships where appropriate. Partnerships should consider how they deliver or support the delivery of other partnership's objectives and where possible create opportunities for joint working to support mutual aims.

Key Findings	Actions Needed

Organised to Deliver

The partnership is efficiently run with an effective structure and sufficient support and resources to deliver against its objectives

	Yes	Yes, mostly	Yes. partially	Not at all	Don't Know	Points to Consider
1. Does the partnership have an appropriate structure which supports decision-making and delivers outcomes?						• Are there clear roles and responsibilities within the partnership structure? • Are decision-making processes clear and understood by all those involved? • Are there leads for each of the partnership's actions?
2. Are the right people involved at the appropriate level of the partnership?						• Do members of the partnership have the authority to speak for and commit resources from their organisations? • Are they able to exert influence within their organisations? • Do individual representatives of partner organisations understand their role and responsibilities within the partnership?
3. Are meetings well run, with effective agenda management?						• Are meetings productive, with an effective chair and appropriate agenda management? • Are meetings well run, promote debate, discussion and common decision making, enable conflicts to be aired and dealt with and enable issues to be resolved?
4. Is there effective administration and support for the partnership?						• Does the partnership have effective arrangements for organising meetings and communication between meetings? • Do members of the partnership feel informed about all the relevant issues?
5. Are there sufficient financial and staff resources to enable the partnership to meet is aims and objectives?						• Do partner organisations contribute appropriate resources to the partnership? • Does the partnership have access to sufficient range of staff with the relevant skills and expertise? • Is there any evidence of joint funding / pooling of budgets? • Is the partnership successful in identifying and levering in external resources?

Effective structures

Having a clear process for making decisions and a structure that helps the partnership to deliver its outcomes is essential if the partnership is going to function properly. Many partnerships find that a small decision-making executive group with action-focused delivery groups is the best way to enable this. However, it is essential that these groups are linked with clear lines of accountability and proper reporting systems. This can be quite difficult to achieve in a voluntary partnership.

Getting the right members involved

Getting the right members is an issue that has a huge impact on the success of a partnership. It is not just a matter of getting the right organisations involved, but also of getting the right representative from that organisation with enough mandate to make decisions on behalf of the organisation and commit resources. It is important to keep the membership of the partnership under review, particularly as circumstances change. If membership is identified as an issue that needs tackling the following link may be useful: Deciding Partnership Roles and Membership www.renewal.net/Documents/RNET/Overview/How%20To/Decidingpartnershiproles.DOC
19.

Administrative support

For the partnership to run smoothly and to be sustainable it is important that administrative support arrangements are adequate, and that additional support from partners is available when required. This is partly a resourcing issue.

Good communications is a vital element of administrative support. It is important that all partners feel fully informed and involved in the partnership. You may need to develop a communications plan that details how effective and accessible communications should take place with both internal and external audiences. For an example see: http://193.112.136.165/pdf/Communications%20Strategy.pdf

Key Findings	Actions Needed

Action & Outcome Focused

The partnership has clear objectives based on evidence of need and can demonstrate that is delivering improvements

	Yes	Yes, mostly	Yes. partially	Not at all	Don't Know	Points to Consider
1. Are policies and strategies based on a) accurate information about the nature of specific problems and b) evidence of what works in determining responses.						• Does the partnership maintain a rigorous evidence base using national and local statistics to identify need? • Does the partnership regularly consult with service users? • Does the partnership understand best practice in terms of what works
2. Has the partnership a clear action plan to achieve their priorities?						• Is the partnership's vision developed into clear objectives? • Are objectives SMART? • Is the partnership able to plan actions that will bring about long-term changes?
3. Are there appropriate processes to deliver partnership priorities?						• Are there agreed lead roles for taking forward partnership actions with clear lines of accountability? • Subgroups or delivery groups have been set up where appropriate? • Are all the relevant organisations involved in the delivery groups?
4. Is there clear evidence that partnership working is providing added value?						• The partnership works effectively and harness the energy of partners to achieve more than just the sum of their parts • The added value can be demonstrated in the form of opportunities or efficiencies that have happened as a result of closer working with partners
5. Can the partnership point to practical achievements on the ground and the contribution that its activities are making to improving the quality of life for local people?						• Is making an identifiable and measurable contribution which can be evidenced by an agreed set of indicators and well-chosen relevant local indicators • Is there evidence that the partnership has influenced decision-making and delivery with the partner organisations? • Is there evidence that the achievements are recognised and valued by the local community?

Evidence-based policy making

All partnerships need to make sure they have sufficient sound evidence on which to make decisions. This partly comes from a good understanding of the relevant statistical information and the use of relevant national and local indicators. However statistical evidence needs to be balanced with evidence from local consultations and feedback from users and other beneficiaries. In deciding on what actions to take the partnership also needs to know what works by being aware of best practice nationally.

In developing an evidence base the following websites may be useful:

The audit commissions website: http://www.audit-commission.gov.uk/areaprofiles

Office of National Statistics: http://neighbourhood.statistics.gov.uk

Data for Neighbourhood Renewal: http://www.data4nr.net/introduction/

20.

Added Value

Ultimately the success of a partnership can only be measured by what it delivers. Unless the partnership has a direct service delivery role it is sometimes difficult to measure the benefits that working in partnership brings but it is important to try and do so. The added value could be demonstrated in the form of opportunities or efficiencies that happen as a result of closer working with partners. It is helpful to review with partners the benefits or added value that you seem to gain from your partnership. Doing so will help to keep partners active and on board.

This tool may help you review the added value of your partnership:

Smarter Partnerships: www.lgpartnerships.com/resources/lead-benpart.asp

Key Findings	Actions Needed

Effective Performance Management

The partnership has a robust performance management system in place and can demonstrate progress on its targets

	Yes	Yes, mostly	Yes. partially	Not at all	Don't Know	Points to Consider
1. Does the partnership have a robust performance management system which include clear milestones, outcomes, performance indicators and delivery dates?						• Are indicators, targets and milestones for each partnership project defined and measured? • Define action, set targets (outcomes) assign responsibility and accountability, and establish methods for diagnosing problems with actions? • Regularly monitors change against agreed indicators • Has the partnership adopted a locally relevant and determined set of quality of life indicators? • Is there a clear process for monitoring progress towards the partnership priorities?
2. Is the financial position monitored and reported regularly to the partnership?						• Is there an appointed accountable body that is responsible for the finances • Is there an agreed process for the regular financial monitoring and reporting?
3. Do partners deliver what they have signed up to do?						• Is there a clear understanding of what individual partners have agreed to do on the partnership's behalf? • Does the partnership have a process for monitoring and reporting on partner inputs and outputs?
4. Is there evidence that the partnership is providing value for money?						• Is the partnership aware of the cost-effectiveness of partners' contributions to the partnership?
5. Do partners share information to support planning and management?						• Has the partnership a common approach to collecting, analysing and sharing information between partners?

Performance Management
Partnerships are expected to have clear performance management systems in place with targets and outcomes set down to facilitate the achievement of its objectives. Monitoring arrangements should be in place to make sure partnerships demonstrate progress on a regular basis, are providing value for money, are taking remedial action where necessary, and identifying their successes and achievements.

The **Improvement Network website** contains useful information on performance management for partnerships.
Neighbourhood Renewal Unit - http://www.neighbourhood.gov.uk/publications.asp?did=200
LAA Toolkit - http://www.lbwf.gov.uk/laa-toolkit.pdf

Value for Money
Value for money needs to be a key governance issue for partnerships. Resources are not being used effectively if partnerships spend too much time in meetings discussing process issues instead of focusing on achieving their objectives. A regular review of value for money should be undertaken and should be an integral part of the performance management arrangements of the partnership. This self assessment tool will help you to evaluate performance in delivering good value for money.
CIPFA ' Improving Financial Management and Effectiveness in Public Service
www.cipfa.org.uk/panels/financial_management/fm_model.cfm

Key Findings	Actions Needed

Inclusive Approach

The partnership actively involves all key players - public, private, community and voluntary sectors, and actively promotes equality.

	Yes	Yes, mostly	Yes, partially	Not at all	Don't Know	Points to Consider
1. Does the partnership make sure that its membership reflects the full range of stakeholders?						• Is the membership of the partnership representative of all stakeholders in the public, private, community and voluntary sector, including hard to reach groups? • Does the partnership regularly review its membership to make sure key stakeholders are represented?
2. Does the partnership ensure that all the partners are fully engaged and have the capacity to be involved with the partnership?						• Does the partnership enable community and voluntary sector representatives to participate fully in its work? • Does the partnership use appropriate methods to encourage involvement and to generate enthusiasm and ideas e.g. focus groups, away days, visits etc.
3. Does the partnership actively involve service users and the wider community as appropriate?						• Does the partnership have processes for consulting and communicating with users and the wider community? • Has the partnership invested in capacity building to facilitate the participation and involvement of users and the wider community?
4. Does the partnership work democratically and is it accountable to stakeholders?						• Is the partnership managed and chaired so as to be able to provide an inclusive and impartial overview? • Are decisions are open to scrutiny e.g. through public meetings, minutes being recorded and being made available publicly? • Does the partnership provide information on its activities and feedback on consultations to user and the wider public?
5. Does the partnership actively promote equality and diversity reaching out and addressing the needs of disadvantaged groups and areas?						• Takes active steps to reach out to and address the needs of disadvantaged neighbourhoods and groups and those that are traditionally under-represented? • Does the partnership use specific methods to measure the impact of policies and actions on particularly vulnerable groups i.e. equalities impact assessment, rural proofing etc. • Does the partnership have an Equalities Policy?

Involvement
Partnerships should operate inclusively and reflect the diversity of local organisations and residents in their decision-making processes. Decisions need to be made about membership, how to recruit members and how to address difficult issues which affect the functioning of the partnership e.g. size, balance, representativeness, coverage. The following link provides a wealth of guidance documents and tools that may assist with these decisions: www.renewal.net - Deciding partnership roles and recruiting members
Not every stakeholder group can become a member of a partnership, but there needs to be effective consultation to make sure their needs and views are taken into consideration.

Equality
Partnerships that involve public authorities and carry out functions or policies relevant to their duties are expected to actively promote equality and have a functioning equalities policy in place that covers race, disability, gender, age, sexuality and religion. All partnerships should be asking how they involve the hard to reach and how their needs and views are taken into consideration.

Key Findings	Actions Needed

Committed to Learning and Development

The partnership learns from best practice, encourages learning and development and is willing to change

	Yes	Yes, mostly	Yes, partially	Not at all	Don't Know	Points to Consider
1. Does the partnership learn from and disseminate best practice?						• Does the partnership takes active steps to learn from best practice in other organisations and other areas? • Does the partnership actively disseminate knowledge and best practice amongst partners? • Can it demonstrate making use of best practice to develop its processes and actions?
2. Does the partnership use and learn from monitoring information and feedback from stakeholders and service users						• Does the partnership use information from its monitoring and review processes to shape its future direction and plans? • Does the partnership use performance indicators to assess its actions? • Does the partnership actively seek feedback with stakeholders and service users?
3. Does the partnership provide opportunities to develop their skills and capacity?						• Does the partnership understand the training needs of member organisations and their representatives? • Are training and development opportunities provided for individuals and organisations involved in the partnership? • Can the partnership demonstrate the effectiveness of training and development activities?
4. Does the partnership regularly review its membership, policies and strategies						• Does the partnership regularly review and challenge what it does and why it does it, the need for its continuing existence and the activities it carries out? • Does the partnership have a flexible approach, changing course when needed to reflect changing needs, problems and opportunities

Learning from Best Practice

Partnerships need to consider how they inform themselves of what others are doing, and how best practice can feed into partnership activities. There may be networking opportunities with similar partnerships or web-based resources that can help the partnership to be in touch with good practice nationally.

Committed to developing skills and expertise

For any partnership to achieve its objectives it must make sure that members are equipped with the appropriate skills, knowledge and attitude for partnership working. The skills involved in partnership working are not necessarily innate but need to be learnt, maintained and developed. It is likely that partners will have different levels of expertise and knowledge.

One way to support new members is through an induction pack or guide. This could include a training needs analysis which could highlight for individual members areas of knowledge or skills for development. A training needs analysis can be as simple or complex as needed to fulfil a "quick fix" or longer term development. The results from partners about what their needs are can then form the basis of a training plan for the partnership.

Review and Evaluate

Regular reviews and evaluation of the partnership is vital if performance is to be maintained. Circumstances change, different opportunities may arise and the partnership needs to be able to adapt to the changing environment. Having a timetable for regular reviews of performance and periodic internal and external evaluation can help to keep the partnership on its toes and performing well.

Key Findings	Actions Needed

5 ENDING A PARTNERSHIP

As the life cycle approach suggests, there comes a time where a partnership may need to end. Ending a partnership does not have to be seen as a failure.

There are many reasons why it might be the right decision to end a partnership:

- Certain partnerships may under perform badly, reach the end of their usefulness, or need to be combined with other partnership arrangements
- Circumstances change and if a partnership has not been reviewed regularly, it is possible that it may flounder for a period of time with no clear direction
- A partnership may stop fulfilling its original purpose, or it may not be needed for that purpose any longer
- A partnership may have achieved its goals and is no longer needed in that particular form

With every review, at each stage of the partnership life-cycle, it is important to regularly ask the following question:
Is the partnership's job done, or is there more to do? If there is more to do, it may be that a failing or floundering partnership is not ended, but re-formed with a renewed focus and started again at the beginning of the life cycle.

It is important to bear in mind that for some members of a partnership, a change of this sort may be seen as undesirable. For example, members may have invested considerable time and energy to a partnership and see a decision to end it as a criticism; others may have some particular interest in maintaining the status quo. Ending or reforming a partnership therefore needs to be carried out carefully and sensitively.

More information about ending a partnership is available at http://www.lgpartnerships.com/resources/learn-ending.asp
This tool treats ending partnerships as a change issue, with the approach depending on what you want to do in the future.

If you are starting up a partnership and/or developing a partnership agreement, it is recommended to include an 'exit strategy' in the agreement so that partners are clear about the circumstances for terminating the partnership.

6 REVIEWING PARTNERSHIP INVOLVEMENT

In the current climate of greater collaboration between agencies and enhanced community engagement, organisations can find themselves involved in a large number of partnerships. This can take a considerable amount of time and resources. It is therefore important to periodically review one's involvement in partnership working. Public bodies have a particular responsibility to make sure that public money is well spent and that the partnerships they are involved with are well governed, well managed and deliver improvements for the wider community. One way to do this is to undertake a regular review of partnerships.

Step 1 **Mapping partnership involvement**
The first step is to identify the organisation's level of involvement with partnerships. List all the partnerships the organisation is involved with, together with their main areas of activity. You may be surprised at the number of partnerships you is involved with, and quickly identify where there are potential overlaps and duplication.

Step 2 **Selecting key partnerships for evaluation**
It would be impossible to evaluate every partnership. To make the process more manageable it is better to focus on key partnerships - the ones that most meet your organisation's priorities, the needs of the area, and Government requirements. Make an initial assessment of their relative importance to your organisation's key priorities and the partnerships performance and effectiveness.

Step 3 **Evaluating partnership involvement**
Once you have selected the partnerships to look at, you need to have evaluate your involvement using a set of agreed criteria. Areas to look at include:
  • Does the partnership contribute to corporate objectives?
  • Is the partnership well governed - are roles and responsibilities defined and financial and legal liabilities covered?
  • How well is the partnership working? (use the quick assessment tool on pg 10 to get a snapshot)
  • What resources does the organisation put into the partnership?
  • What benefits does the organisation get from its involvement?
  • What does the partnership deliver for the wider community
  • Does the partnership provide value for money?
  • What risks are involved in the partnership?

20.1.1

Step 4 **Streamlining involvement**

Once you have done an evaluation of key partnerships there may be some hard decisions to make. Does your organisation need to be involved in these partnerships and what level of involvement is appropriate? Prioritising your organisation's involvement in partnerships may not necessarily mean selecting those that are the most focused and best organised. Sometimes the most important ones need the most effort to improve their performance. Remember there are other options other than withdrawing.

• Allow another body to represent your interests
• Set a time limit for involvement
• Remain involved
• Remain involved, but at a different level, for example a watching brief, or attendance when the agenda is relevant to the organisation

Step 5 **Planning Improvements**

Once you have decided to continue involvement , you may still want to make sure your involvement is productive by improving the performance of the partnership. Use Section 4 to identify areas for improvement and to draw up an action plan. Two key areas to look at are:

• Clarifying roles and responsibilities within the partnership
• Formalising partnership arrangements through developing robust partnership agreements

Step 6 **Regular Review**

Finally, when you have evaluated your organisation's involvement in key partnerships, this involvement needs to be regularly reviewed against changing needs and priorities.

- Review the fitness of partnership agreements or other governing documents to changing circumstances
- Review the performance of key partnerships
- Review the risks of being involved

Other Resources

A Tool for Evaluating Economic and Regeneration Partnerships
http://www.sheffieldfirstforhealth.net/resources/docs/partnershipevaluationtool.pdf

Audit Commission: Governing partnerships   http://www.audit-commission.gov.uk/reports/NATIONAL-REPORT.asp?CategoryID=&ProdID=1CDA0FEF-E610-463c-B3F3-220F607B1A2C

7 FURTHER RESOURCES

 Partnership Self- Assessment Toolkit: A practical guide to creating and maintaining successful partnerships
www.lgpartnerships.com

How to build a partnership
www.renewal.net

Partnership Portal - Service Level Agreements
www.ourpartnership.org.uk

General information on partnership working
www.audit-commission.gov.uk

Partnership Checklist
www.improvementnetwork.gov.uk

A Tool for Evaluating Economic and Regeneration Partnerships
http://www.sheffieldfirstforhealth.net/resources/docs/partnershipevaluationtool.pdf

Suffolk Partnership Evaluation Toolkit
www.suffolk.org.uk/toolkit.html

Stockport Partnership Toolkit
http://193.112.136.165/pdf/PartnershipsToolkit_May06.pdf

There are many toolkits developed with particular types of partnership in mind – some of the following may be useful depending on the type of partnership being assessed:

Health Development Agency - The Working Partnership: http://www.ourpartnership.org.uk/anncmnt/anitem.cfm?AnnID=30
Learning Partnerships: http://www.dfes.gov.uk/learningparttoolkit/documents/LearningPartnershipsPriorities.pdf
Community Safety – The Nacro Guide to Partnership Working - http://www.nacro.org.uk/data/briefings/nacro-2001062503-csps.pdf
Step-by-step guides to help deliver Neighbourhood Renewal - http://www.renewal.net/Toolkits.asp

A MEMORANDUM OF UNDERSTANDING/PARTNERSHIP AGREEMENT

A Partnership Agreement / Protocol should lay down the purpose and principles of partnership working and the roles and responsibilities of member organisations and their representatives. It should also clearly set out the roles and responsibilities of any sub groups or officers of the partnership. A typical agreement will include, in varying levels of detail, the following elements, depending on the size and complexity of the partnership.

Purpose of the Partnership

1. Name

2. Purpose   What is the purpose of the partnership?

3. Shared Principles   Are there any underlying values the partnership wants to maintain?

4. Aims and Objectives   What are the key objectives of the partnership?
                                    How is it going to achieve this purpose?

Membership & Structure

5. Membership   What is the basis for membership of the partnership?
                                    Who is on the partnership and who do they represent?
                                    When will membership be reviewed?
                                    Are there rules for the status of different members? (e.g. co-option, substitutions)

6. Structure   What is going to be the structure of the partnership?
                                    Is there going to be an executive? Are there going to be sub-groups / working groups?
                                    What are the accountabilities between different levels of the partnership or partnership family?
                                    How does the partnership relate and link to other partnership working on similar issues/ working in the same area? (a diagram may be useful?

Roles and Responsibilities

7.	Roles & Responsibilities	What are the roles and responsibilities of individual partners, and their representatives?

7.   Roles & Responsibilities   What are the roles and responsibilities of individual partners, and their representatives?
Are there any specific roles that need to be undertaken by individual partners e.g. accountable body?
What are going to be the accountabilities between partners?

There may need to be individual sections on:
- Roles and responsibilities of Executive
- Roles and responsibilities of Chair
- Roles and responsibilities of Executive members
- Roles and responsibilities of key officers
- Role of accountable body

20.2
Functioning of the Partnership and its subgroups

8.   Resourcing   How is the partnership going to be resourced?
What financial contributions will partners be making?
What staff time will partners commit to the partnership?
How will resources be managed?

8.   Conduct of Meetings   How are meetings going to be conducted?
What is the notice and frequency of meeting?
How are decisions going to be made – voting arrangements, quorum rules, representation and substitution?

9.   Reporting and Monitoring   What arrangements are in place for managing and monitoring performance?
What arrangements are in place for managing and monitoring finances?
How and when will performance be reviewed?

10.   Information Sharing   What information will agencies need to share?
How will this be done? (Including overcoming any technical or legal barriers

11.	Code of Conduct	What arrangements are in place for guiding the conduct of individual members of the partnership? How will declarations of interest be managed?
12.	Resolution of Conflict?	What processes are in place for resolving disputes that may arise between partners? How will problems be prevented?

Fiscal and Legal Requirements

13.	Financial Controls	Is there a clear budget set for revenue and capital purposes? What arrangements are in place for monitoring the partnership's budget? How will action be taken where there are major variances in the budget? What arrangements are in place to limit the financial liabilities that the partnership can incur? What financial procedures / controls are in place? What mechanisms are in place to review the financial procedures on a regular basis?
14.	Legal Accountabilities	What arrangements does the partnership have for seeking relevant legal advice? How and when will the partnership receive legal advice What arrangements are in place to ensure that the partnership is not able to commit potentially fraudulent or illegal transactions? Does the Council Solicitor or a representative from legal services receive regular reports on new initiatives and progress of the partnership?

Future Changes

15.   Changes to the Agreement   How and when is the agreement going to be reviewed?
                                      How can the agreement be changed?

16.   Ending the Partnership   What are the arrangements for dissolution of the partnership?

Signing off the Agreement

16.   Signatures of partners   All key partners should sign and date the Agreement.

CONTACT POINT

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