Learn Local

Partnership Support Package

Adult, Community and Further Education

Victoria State Government
Education and Training

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of Education and Training

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FOREWORD

The Victorian Government is transforming Victoria into the Education State to better support Victorians develop the skills they need for the job they want at any age. Victorians should feel confident they can transform their lives, their careers and their future. The Learn Local sector plays a critical and unique role providing opportunities for life-long learning, especially for vulnerable and disengaged learners in local communities.

The ACFE Board, through *Learn Local: Focusing on the Future* (2013), identified opportunities for the Learn Local sector to address the challenges it faces. One of these opportunities is the capability to promote durable and sustainable networks and co-location of services to ultimately improve learner pathways.

Learn Local organisations have demonstrated their ability to develop both formal and informal networks and establish partnerships. However consultations with the sector in 2014 indicated that this work is time and resource intensive as well as being difficult to sustain. The ACFE Board was advised that Learn Local organisations need specific supports in establishing formal partnerships.

This *Learn Local Partnership Support Package* is one of the mechanisms of support designed to assist Learn Local organisations in this endeavour. It includes guidance materials and resources specifically designed for the Learn Local sector to establish formal partnerships through the phases of exploration and development, through to implementation and maintenance.

The guidance materials and resources contained in the *Learn Local Partnership Support Package* are built on strong evidence and are underpinned by extensive consultation with a large number of Learn Local organisations experienced in partnerships.

The ACFE Board acknowledges the contribution of Learn Local organisations and thanks them for their wisdom and generosity in contributing to this work. The ACFE Board commends the *Learn Local Partnership Support Package* to you as an important resource to support the Learn Local sector to continue building on its efforts to develop and sustain formal partnerships.

Sue Christophers

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Chair
Adult, Community and Further Education Board

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Section One

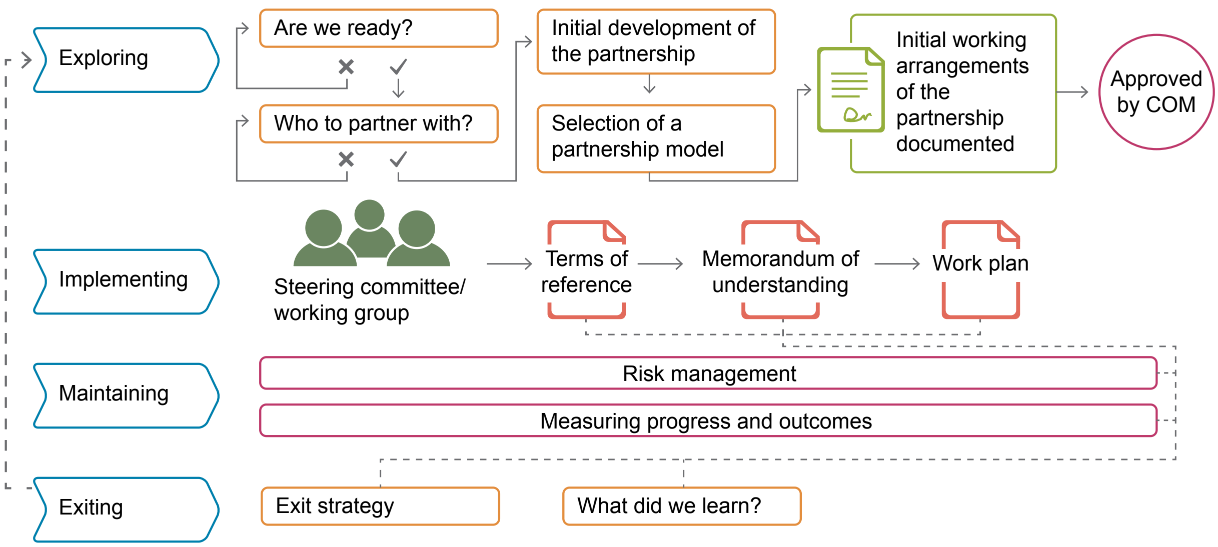
Introduction

1 INTRODUCTION

This package provides partnership guidance to Learn Local organisations. Given the broad and varied nature of partnerships in the Learn Local sector, the package provides general advice that may apply across a range of different partnership types and models. It is designed to be used by Learn Local organisations that may be initiating a partnership, and can also be applied to existing partnerships.

There are four main components to partnership. These are partnership: exploration and development, implementation, maintenance and dissolution (exiting). This package dedicates a section to each of these four components, as illustrated in the flow chart below. Within each section, guidance materials including templates, checklists and case studies are provided. This document begins with an introduction to Learn Local partnerships and provides information about how to navigate the resource. An additional section (section 6) provides general tips and tricks specific to Learn Local partnerships.

The package is designed to be a one-stop-shop and as such includes a full range of materials that may be useful for Learn Local organisations to utilise (and adapt). It also includes links to other useful materials which are available through government and not-for-profit sector websites.



1.1 What is partnership?

There is no single definition of a partnership. Some organisations may use the phrase to describe a governance arrangement, or a shared sense of purpose. For example, an organisation contracting another to deliver a service, or several organisations establishing a network to share information, may regard themselves as 'partners.'

This resource defines a partnership as a mutually beneficial, collaborative and integrated relationship between two or more organisations. Partnerships – either successful or otherwise - fundamentally change how each organisation operates on its own. For more information about and examples of common partnership models in the Learn Local sector, please refer to section 2.4.

1.2 Why partner?

While there is a range of reasons that bring Learn Local organisations to consider partnership arrangements, the driver remains the same: Learn Local organisations achieve more through working in partnership than they can achieve when they work on their own.

Partnerships are especially important for the Learn Local sector. The vocational training sector is adapting quickly to respond to the need for a high-value, high-skill economy and the increasing expectations of Victorians for quality, personalised and lifelong education opportunities. In a context where there are more types of training and organisations for students to choose from, Learn Local organisations must compete and innovate to offer services that meet this need. Partnerships between organisations will assist the sector overall to foster its position within Victorian communities, especially in regional and rural areas.

1.2.1 Benefits and challenges for Learn Local organisations

There are a number of benefits to working in partnership. Partnerships can allow organisations to be more creative, share knowledge and build new skills. Partnerships can motivate organisations who have 'always done things this way.' Importantly, they can also provide an opportunity to share leadership and the workload that inevitably comes with any partnership.

For Learn Local organisations, partnerships can result in benefits such as:

- Offering your community a greater choice of learning programs and pathways. The learning programs your partner offers can be a useful marketing tool when engaging new learners for the first time, or when encouraging existing learners to enrol in another program.
- Improving pathways for learners and community members between services. For example, partnering with a nearby community health service may improve the health and wellbeing outcomes of the more vulnerable members of your community.
- Diversifying your income through, for example, joint fundraising activities, and funding grants.
- Reducing your expenditure through economies of scale.

In spite of the range of benefits a partnership can offer, there are some challenges for Learn Local organisations working in partnership. These include:

- Being clear about the purpose; enthusiasm for a great idea can encourage some organisations to expedite or skip the planning process. The reasons for establishing the partnership must be accepted and understood by all partners.
- Finding sufficient time and resources to commit to what you have agreed. Your partnership is probably not going to yield benefits immediately, so you will need to maintain the momentum even when there are competing priorities.
- Gaining and maintaining buy-in with your Learn Local organisation, from your Committee of Management (COM) through to your part-time and full-time staff. This is especially important during the early days of the partnership when initial enthusiasm can start to wane.
- Overcoming challenges along the way. These might be related to different personalities or different approaches to running the organisation.

1.3 Navigating this resource

The resources provided in the package are intended to be used as a guide for undertaking a range of Learn Local partnership types and models. As such there is no one correct way of using them; rather they are intended to be flexible. For example, section 2.5 explains how the concept of a partnership can be developed and documented in a ‘spirit of agreement,’ however it may be more appropriate for your Learn Local organisation to use this section to develop a memorandum of understanding. There is additional information for developing a memorandum of understanding in section 3.3. Information in section 3.3 can also be used to develop a more formal partnership contract, however legal advice would also need to be sought.

Your organisation may already have developed and implemented a partnership, but would like information about how it can be maintained into the future. As such, it may be more beneficial to refer directly to section 4 which provides resources to measure the success and progress of a partnership, and to manage risks.

This resource has been designed for you to be able to pick up and read the sections that are relevant to the partnership work that you are undertaking; whether exploration and development, implementation, maintenance, or exiting/dissolving. As such, it is not necessary for you to read it from cover to cover, but over time as you progress through different partnership phases.

It includes links to existing partnership resources that you may find useful. These are included at the relevant points throughout the package and can easily be found by looking for this icon.

Templates are provided to assist you at various points through the four stages of partnership. These are included at the end of this package but this icon is provided at relevant points throughout the package for your convenience. You can directly access each template by double clicking on the icons.

1.3.1 Does the package provide all of the information I need to do partnership?

This package provides information and advice for your Learn Local organisation to undertake partnership through the four stages of partnership, namely: exploring and developing, implementing, maintaining, and exiting. Nonetheless, the package is designed to meet the needs of a range of different Learn Local organisations undertaking a range of different partnership activities. As such, there may be factors that are specific to your organisation and your partnership that are not reflected in this resource.

This resource does not provide legal guidance or advice. It does however provide information on the legal matters you may face and at what stages of partnership legal advice may need to be sought. Your Learn Local organisation and partner organisations may also need to seek legal advice for aspects of your partnership that are specific to the work you are undertaking.

Section Two

Exploring and developing a partnership

2 EXPLORING AND DEVELOPING A PARTNERSHIP

In this section you will find information to help your Learn Local organisation decide whether it should commit to implementing a partnership. It provides advice about what to do if your Learn Local organisation is proactively seeking partnership opportunities and what to do if you have been approached by another organisation to join a partnership.

2.1 Understanding your Learn Local organisation's readiness for partnership

This section may be useful to assess whether your Learn Local organisation is ready for partnership.

The first step in exploring the possibility of partnership is reflecting on the readiness of your Learn Local organisation to partner. There are a number of crucial factors your Learn Local organisation should consider before exploring any partnership opportunities.

Template for assessing your Learn Local organisation's readiness

The template in section 7.1 of the package outlines these factors and can be used as a discussion point for internal conversations to inform an understanding about your Learn Local organisation's readiness. The template prompts you to consider whether a partnership is justified. It does this by prompting you to consider what your Learn Local organisation could accomplish by pursuing a partnership, what the opportunity costs may be, and the extent to which it could advance elements of your strategic plan. It prompts you to consider the strengths of your Learn Local organisation, how these strengths could be aligned to partnership activities, and what conditions might need to be in place before your Learn Local organisation explores partnership opportunities. Your responses can also be used later to consider which kinds of organisations you should partner with and to develop and implement the partnership itself.

2.2 Understanding who to partner with

This section may be useful if you have identified a potential partner organisation and want to understand whether they would be a good fit for a partnership

It is vital to gain a strong understanding about potential partner organisations before making a partnership commitment. If your Learn Local organisation doesn't have any potential partner organisations in mind, it may be worthwhile exploring networking opportunities (for more information about networking, see section 6.1).

Template for understanding your partner organisation/s

If your Learn Local organisation has identified a potential partner/s, you can use the template in section 7.2 to consider whether they are likely to be a good fit for a partnership. The template prompts you to collect information about the nature of the potential partner organisation, and to consider whether your organisations share similarities. It also prompts you to consider a range of possible partnership opportunities that might exist, and whether your organisations have worked together before. It has space to allow for reflection of up to three other organisations.

It is important to note that gaining the information needed to complete the template will require some informal conversations or meetings with the potential partners.

Once you have completed the template, you can use it as a stimulus for discussion within your Learn Local organisation. If it is decided that the partner organisations are likely to be a good fit, you can begin to flesh out what your partnership might look like (see section 2.3).

2.3 Initial development of the partnership

This section may help you decide on some essential characteristics of a partnership before committing to its implementation

The purpose of this initial development process is for the organisations to have enough information to be able to make an informed decision before committing. An informed decision will greatly increase your chances of success. As such it is important that partner organisations can agree upon the:

- Purpose of the partnership
- Initial goals, and activities to achieve the purpose and vision
- Potential availability of resources each partner can contribute
- Potential roles and responsibilities of partners.

In addition, you should consider the initial risks a partnership may bring to your Learn Local organisation.

It is important to note that this process involves initial agreement on various functions of the partnership. However, many of these functions would be explored further when partners commit to implementation.

TIPS

Who should be involved in this process?

Key decision makers, including:

- High level people with authority and power to make important decisions on behalf of their organisations, such as the manager, CEO or people with sufficient authority
- Any staff member/volunteer who will be involved in the day to day operation of the partnership
- Your COM
- Subject matter experts and external facilitators if appropriate.

2.3.1 Purpose of the partnership

The starting point for the initial development of the partnership is to form a strong commitment towards a common purpose and vision. The process for determining a partnership's purpose involves reaching consensus between partners about the basic premise upon which the partnership will operate. This will provide clarity for formulating clear goals and initial activities to focus the work of partner organisations and help them to determine what resources will be required.

The purpose should be developed by relevant people from each organisation with sufficient decision-making ability. It may be that one organisation is driving the partnership and so will make a greater contribution. Nonetheless, all partners should be involved in this process and have the opportunity to contribute.

Template for defining the purpose of the partnership

The template in section 7.3 may be useful as a guide when determining the purpose of the partnership. It includes a set of guiding questions to help your Learn Local organisation to define the purpose of the partnership and space to document a mission statement.

The mission statement can capture the purpose of a partnership by defining the desired characteristic/s of the partnership. If you have completed the template from section 7.2, the information you collected should be useful for this process.

Example of a partnership purpose

To establish a trusting and mutually supportive partnership between the four Learn Local organisations in the Yarra Ridge region in order to provide tailored learning opportunities and wraparound support for vulnerable people in our community.

2.3.2 Forming partnership goals and activities

The goals are broad statements about what the partnership intends to accomplish. They should be directly linked to the purpose of the partnership.

Activities are the steps that the partnership should take to achieve its stated goals. Goals tend to be longer-term intended outcomes or concepts; activities are specific work that will be required to achieve the partnership goals.

Using the example of the partnership purpose above, the flow chart below illustrates how partnership goals can be derived from the partnership purpose, and how these goals can be translated into specific, actionable partnership activities.

Purpose

To establish a trusting and mutually supportive partnership between the four Learn Local organisations in the Yarra Ridge region in order to provide tailored learning opportunities and wraparound support for vulnerable people in our community.

Goals

Build strong relationships between partners

Activities

Development of formal partnership documentation between partners (e.g. MOU)

Development of formal and regular communication channels between partners

Ongoing review and continuous improvement of partnership

Regular opportunities to celebrate the success of the partnership

Goals

Offer a wider range of education courses and create better access to education for vulnerable members of the community

Activities

Research into the educational needs of the vulnerable community members

Increased # of education courses offered in line with research

Increased marketing and promotion of education courses

Co-delivery of education courses across partner agencies

Goals

Improve referral pathways between service providers

Activities

Streamlined enrollment/ application forms and referral processes (no wrong door approach)

Streamlined policies and procedures to increase information sharing

Shared marketing and promotion of the service provided by partner organisations

2.3.3 Resources, roles and responsibilities

Once you have an understanding of the activities of the partnership, the resources required to achieve the activities, and the roles and responsibilities of each organisation, should be clearer.

Prior to agreeing to implement the partnership, agreement should be reached about which organisation will be the lead partner. The lead partner is usually responsible for managing partnership finances. If the partnership is funded through a grant, they will also usually be responsible for the grant application and reporting and acquitting funds. Your Learn Local organisation may need to consider the implications for becoming a partner. For example, there may be implications for deductable gift recipient status or other taxation issues. As such it may be appropriate to seek legal advice.

Agreements should also be reached about what resources each partner can contribute. Consideration should be given to the size of partner organisations and the relative resources (funds, people, skills, knowledge, and infrastructure) they will be able to contribute.

For more information on determining what resources, roles and responsibilities may be necessary to implement a partnership, please refer to section 3.4.

2.3.4 Initial risks

A risk mitigation strategy would usually be developed once partners have agreed to implement a partnership (for more information, see section 4.2). However, it is important to initially identify and consider the risks before committing to a partnership.

Template for identifying initial partnership risks

The template in section 7.4 may be useful as a guide when considering the potential risks of the partnership to your Learn Local organisation. It prompts you to consider a range of partnership risks that are common to the Learn Local sector and whether they might apply to the partnership your Learn Local organisation is exploring. It provides space to document the risks and initial mitigation strategies.

The extent to which the risks are relevant will depend on the type of partnership that is being proposed. For more complex partnerships, such as co-location which involves physical relocation of your Learn Local organisation, a deeper exploration of potential risks, particularly legal risks, should occur.

Depending on the risks identified, it may be appropriate for partners to agree to strategies to mitigate risks prior to committing to implementation.

2.4 Selecting an appropriate partnership model

This section may be useful to gain a general understanding of the different types and models of partnership that Learn Local organisations are engaged in, and what partnership model will be appropriate for your partnership.

Broadly speaking, Learn Local organisations undertake partnerships for the following purposes:

- Shared knowledge and expertise, such undertaking a joint research project, sharing data, sharing training, or establishing a community of practice
- Shared administration, such as bookkeeping, payroll, or marketing
- Shared delivery, such as co-delivering a new program, combining specialist service delivery, or developing an outreach program
- Shared facilities, such as delivering one education program at a number of sites.

These four points illustrate common types of partnership Learn Local organisations undertake. For more information about determining what type of partnership to undertake, please refer to section 2.3.

Once partner organisations are clear about what the partnership will be (the type of partnership), the next step is to consider and agree upon how it will be implemented. This involves adopting a particular partnership model. Some of the most common partnership models in the Learn Local sector include: formal strategic alliances, joint ventures, non-distributing cooperatives and co-location partnerships.

A summary of these partnership models is provided below, as well as examples of common types of partnerships that can be appropriate for the various models.

2.4.1 Formal strategic alliance

A formal strategic alliance partnership model involves organisations entering into a formal agreement to work together around a shared vision or set of goals.

In cases where a formal strategic alliance involves, for example, shared use of facilities owned or leased by one partnership organisation, the partnership may require a legal agreement to manage any risks or costs associated with incidental damage to the property. The governance of the formal strategic alliance may also be more rigorous, to manage the risks involved. However, many formal strategic alliances will not require legal agreements if resources are not being pooled to support the partnership.

CASE STUDY
The Orange Learn Local Alliance

Orange Learn Local Alliance was established as a result of a funding grant from the Department of Education to re-commence delivering pre-accredited training at the former site of an education provider. At the time, there was a shortfall in pre-accredited training delivery in Outer Orange and the site was vacant. Several Learn Local organisations in the region agreed to form the alliance in recognition that it was the most cost-effective delivery option. Members were driven by a shared view that by working together each individual organisation would become stronger in organisational capacity and business development over the longer term.

The alliance developed a Memorandum of Understanding that recognised that members would continue developing and delivering their own programs, but that they would also aim to broaden the delivery and availability of educational programs in their local area. The alliance developed specific business initiatives intended to realise this goal, and developed broad measures of success to help the alliance understand how they were tracking against their goals.

2.4.2 Joint venture

The joint venture partnership model involves two or more organisations undertaking to partner for a specific purpose. The joint venture is often time limited and narrowly defined, and may involve a contractual arrangement. In some cases, a joint venture may be incorporated and becomes a legal organisation, such as a company limited by guarantee or a private company. In cases where a separate legal entity has been created, you will need to be aware of the requirements set out in the Corporations Act 2001 (Corporations Act).

One of the benefits of a joint venture is that it provides both partner organisations with the flexibility to try something new, without the risk of establishing a binding arrangement that does not work.

The joint venture partnership model may be employed for the purposes of shared training delivery. Increasingly common across the Learn Local sector, shared training delivery allows organisations to utilise existing resources, such as under-utilised learning spaces and recurrent funding for pre-accredited programs. Organisations may benefit from having different members of the community accessing the Learn Local organisation, whilst utilising any available budget.

The drawback is that shared training delivery can be complex where it involves accredited training. Organisations wanting to explore shared training delivery for accrediting training should consult in the first instance with the Victorian Registration and Qualifications Authority (VRQA) to understand the requirements.

2.4.3 Non-distributing cooperative

The non-distributing cooperative partnership model involves several organisations coming together through the formation of an overarching governance structure. Each Learn Local organisation maintains its operating structure, but is governed by an overarching entity with representatives from each Learn Local organisation.

Cooperatives can enter into an agreement to share core administrative or other support functions. This could involve co-contributions by partners to employ cleaners, IT support, or accounting staff to prepare annual reports. In these situations, Learn Local organisations can benefit from more effective management of short-term or irregular business needs, and by offering more appealing employment arrangements for prospective staff.

This partnership model is particularly well suited to small Learn Local organisations working within a council area with multiple other Learn Local organisations. It may also be useful for Learn Local organisations in regional areas where there are other agencies undertaking similar types of work.

CASE STUDY

Link Partnership

A number of Learn Local organisations in a region of Northern Victoria have been talking for some time about how to maintain their competitiveness with other education providers in the area. They identify that they offered something unique to learners, but that their visibility was often limited because they did not individually possess a budget for marketing. They decided to take action by generating support for a partnership among local stakeholders. They decided upon drafting a MOU and worked at developing the partnership at all levels of each organisation. Staff across organisations started working on joint funding submissions.

They decided that to achieve the degree of visibility they needed, they required a clear business model for the partnership. They established a non-distributing cooperative with a governing board of directors that represented each Learn Local organisation. Since establishing the co-operative, they have commenced joint delivery of programs, established a separate office and developed branding that is recognised by key stakeholders.

2.4.4 Co-location

Although there are fewer examples, some Learn Local organisations are exploring co-location partnerships. Co-location involves partnering with another organisation or agency next door, or across the road. This could involve a partnership with an agency that is already co-located with your Learn Local organisation, or partnering with an organisation with the intended purpose of re-locating the physical infrastructure.

Co-locating an agency that provides early childhood education and care next to your Learn Local organisation may encourage parents with small children to re-engage with learning. It can also provide an accessible means of providing occasional or day care to adult learners who otherwise would not participate in an education program during the day.

Depending on the arrangement, a co-location partnership may involve additional governance arrangements to support co-operation and collaboration between the Learn Local organisation and the co-located agency. This could include a steering or advisory committee to support both organisations to set up processes and systems to maximise the benefits of the co-location (for example, the development of joint marketing material for the local neighbourhood). Where relocation and construction of new facilities is required, your partnership will want to consider how oversight of this activity is resourced (for example, appointing a dedicated project manager who can manage the timelines associated with the construction of a new facility).

Co-location partnerships that involve physical relocation or construction of facilities require considerable effort and financial resources. Given this, Learn Local organisations should carefully consider the benefits and risks of this model before they proceed. You may want to limit this model to partner organisations that you have worked with successfully before and with whom you have a trusting, honest and respectful relationship.

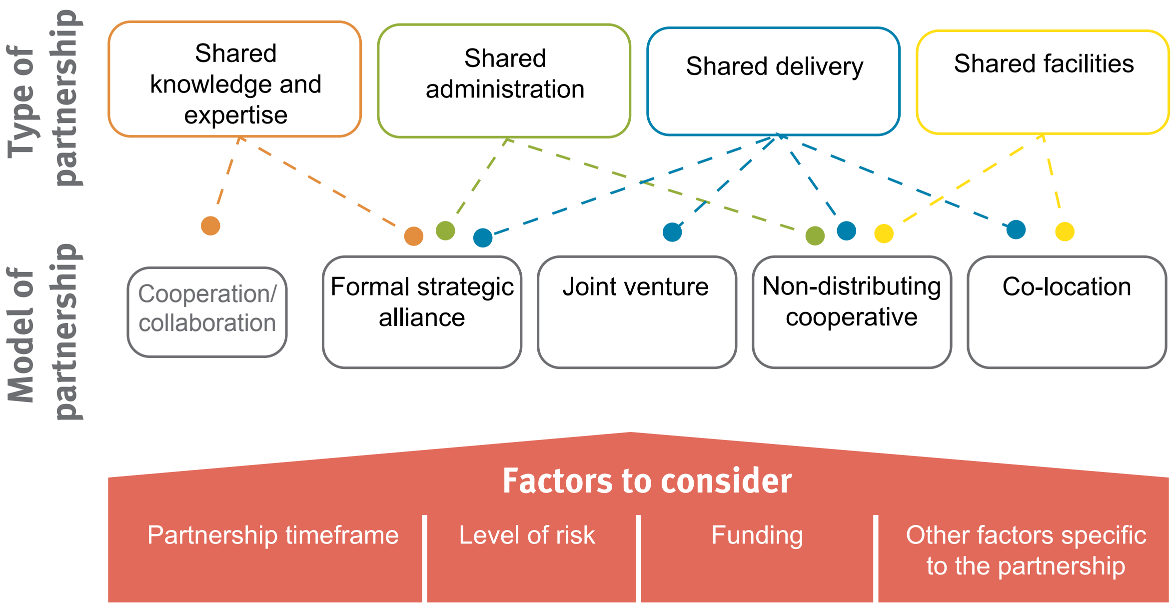
2.4.5 Selecting an appropriate partnership model

As indicated in the image below, the partnership models provide the mechanism for different types of partnership that are common to the Learn Local sector. Cooperation/collaboration is also included, however, it is more appropriately defined as a form of ‘informal joint effort,’ as opposed to a model of partnership. This is because the partnership models listed are underpinned by more rigorous documentation of the working and resourcing arrangements, and require a greater level of effort to implement. Unlike more informal arrangements, too, some joint ventures, non-distributing cooperatives and co-location partnerships may have legal implications if contractual arrangements are involved or new entities are being developed.

Some partnership models are more appropriate for some partnership types compared to others. Either way, there are three specific factors that your organisation should consider to support you to identify the partnership model that is appropriate for your partnership. These are:

- The timeframe for the partnership
- The degree of risk your organisation will be able to tolerate
- The availability of funding to resource the partnership.

Factors to consider when selecting a partnership model



A matrix is provided below to support you to identify your partnership model:

Timeframe	Risk	Funding	Partnership model
Our partnership is a medium to long term arrangement	Partners are only able to accept low level risk	The partnership is able to access a small amount of funding	Formal strategic alliance
Our partnership has a fixed time frame (generally short term)	Partners are able to accept a medium level of risk	The partnership is able to access a moderate amount of funding	Joint venture
Our partnership is a medium to long term arrangement	Partners are able to accept a medium level of risk	The partnership is able to access a large amount of funding	Non-distributing cooperative
Our partnership is a long term arrangement	Partners are able to accept a high level of risk	The partnership is able to access a large amount of funding	Co-location

The selection of the appropriate partnership model may also depend on factors that are specific to your partnership and the organisations involved.

While this section can be used to inform your choice about the appropriateness of a partnership model, if your organisation is planning to implement a partnership that is legally binding, you will need to seek legal advice.

Additional Information

Existing resources that may assist your Learn Local organisation with shared services:

What: Community sector shared services: How to establish shared services – a step-by-step guide

Where: Department of Health and Human Services website

Recommended search terms:

How to establish shared services: a step-by-step guide

Existing resources that may assist your Learn Local organisation with co-location:

What: Moving in together: A co-location guide for neighbourhood houses and learning centres

Where: Victorian Competition and Efficiency Commission website

Recommended search terms:

Moving in together a co-location guide for neighbourhood houses

2.5 Developing a ‘spirit of agreement’

This section may be useful to capture agreed partnership arrangements, and for seeking approval from your COM.

Your COM will need to approve the partnership prior to implementation. Completing a ‘spirit of agreement’ template may support the COM to make an informed decision. It could also serve to bring together the working arrangements that partners have agreed upon.

Template for the spirit of agreement

The spirit of agreement template (section 7.5) prompts you to capture the following information:

- The justification for the partnership
- The purpose of the partnership
- The specific partnership model to be implemented
- The initial goals and activities of the partnership
- The potential availability of resources each partner can contribute
- The potential roles and responsibilities of partners
- The initial risks identified by partners and mitigation.

If you have filled out the templates in sections 7.1 – 7.4 of this resource, they can be used to complete the spirit of agreement template.

2.6 What if my Learn Local organisation has been invited into a partnership?

This section may be useful if you have been approached by another organisation with an offer of partnership.

The steps required to decide whether your Learn Local organisation should accept an invitation to join a partnership may be different than if your Learn Local organisation is proactively seeking a partnership. Nonetheless, much of the due diligence required will be the same. You will need to ensure that:

- Your Learn Local organisation is ready to partner (see section 2.1)
- You have a good understanding about the potential partner/s and that there is organisational fit (see section 2.2)
- You have sufficient buy-in, such as having the opportunity to contribute to the development of the purpose and goals of the partnership (section 2.3)
- You have assessed the initial risks that the partnership may pose to your Learn Local organisation (see section 2.3.4)

Quick checklist for considering whether to pursue a partnership

The checklist in section 7.6 provides a list of items your Learn Local organisation should consider if it has been approached for a partnership.

Additional Information

Existing resources that may assist your Learn Local organisation in preparing for partnership:

What: Partnership practice guide: Guide 1 – preparing to partner

Where: The Victorian Council of Social Service (VCOSS) website

Recommended search terms:

VCOSS partnership guide preparing to partner

What: VicHealth partnership analysis tool

Where: VicHealth website

Recommended search terms:

Vichealth partnership analysis tool

What: Partnership practice guide: Guide 2 – commencing the partnership

Where: VCOSS website

Recommended search terms:

VCOSS partnership guide commencing the partnership

2.7 Case studies: Exploring and developing a partnership

Two case studies are presented below. They provide examples of good practice in relation to exploring and developing a Learn Local partnership. The case studies are further elaborated in section 3.6 (implementing) and section 4.4 (maintaining).

CASE STUDY ONE:

Yarra Ridge Learn Local Partnership

Yarra Ridge is an area on the outskirts of Melbourne with a high proportion of people from low socio-economic background. Fatima manages Riverdale, one of four Learn Local organisations in the Yarra Ridge region. Riverdale specialises in back-to-work, employment ready courses, but has recently become aware that an increasing number of its service users have drug and alcohol dependency and mental health issues.

Fatima arranges to have lunch with Scott who manages the neighbouring Birrarung Learn Local which has had success in supporting service users with these health issues. Fatima and Scott have known each other for two years and have developed an open and trusting working relationship. They recognise there could be advantages to working together and, if they include two other Learn Locals in Yarra Ridge, they could really improve and expand the delivery of courses and support to their community.

They arrange a meeting with Maria and Tuong, managers of the two other centres, and share their idea. The four of them brainstorm how they could work together and what a successful program would look like. They agree on some important fundamentals, notably that working collaboratively is far more effective and leads to better outcomes than working competitively. They realise they have many shared values, enjoy working together and that they are well placed to help their community with the particular challenges it faces.

Over the next six months they meet regularly to discuss the respective strengths and weaknesses of their organisations and what each could contribute. They read each other's annual reports and share feedback from their staff. Over this time they develop a tight knit relationship that is respectful and trusting. They are enthusiastic about working together on a long-term, collaborative project.

Finally, they put pen to paper and write a "spirit of agreement" which includes the background and purpose of the partnership, broad goals and initial activities, and how they can work together to deliver a high quality and sustainable program. They also agree that a formal strategic alliance will be the appropriate partnership model to implement.

Elements of best practice:

- All parties develop a good working relationship before any agreement is made
- The process of reaching an agreement is gradual and takes a number of months
- The people involved have a shared vision and shared core values
- They are open and honest with each other about what they can contribute
- They are able to agree upon and write an informed and realistic outline of the project.

CASE STUDY TWO:

Clifton Community Cafe

Clifton Community Café is a community-wide initiative developed by a partnership of Clifton Neighbourhood Learning Centre, the Philipstown Council, Clifton Youth Centre, and the Ability Group, a small local charity that supports young people with an intellectual disability.

Philipstown Council covers a wide geographical area that includes people from diverse cultural backgrounds and different socio-economic groups. There is a significant cohort of disaffected and disengaged youth in the area.

Bianca is the manager of the Clifton Neighbourhood Learning Centre; she has over twenty years' experience working in this space and has managed a number of large scale collaborative projects. Bianca has worked with the Clifton Youth Centre previously and has a good professional relationship with Navid, the chair of their Committee of Management (COM), and a number of their staff.

The idea for a community café comes out of a discussion between Bianca and Navid who recognise that their respective organisations have complementary strengths and that if they combine forces they could create something of enormous benefit to the young people in their community. A partnership like this would give them some great skills and provide a pathway to employment.

They approach Philipstown and the Ability Group to partner with them. The Ability Group does great work and has an excellent reputation, but very minimal funding; a partnership might offer them significant benefits. Plus, from previous experience, Bianca knows they stand a better chance of securing funding if they apply as a group.

Bianca and Navid meet regularly with a representative from the Philipstown Council and the chair of the Ability Group COM. Over about eight months they thrash out their vision for the community café and clarify their expectations of the project. They are able to work through occasional disagreements and develop an open and trusting relationship. They have lengthy discussions about the fact that each partner will have a different role and will contribute in a different way. Finally, they develop and submit a detailed funding proposal. The funding proposal includes an agreement that the partnership will be implemented as a joint venture.

Elements of best practice

- The partnership is led by someone with the appropriate skills and experience to manage a diverse group of organisations working together on a long-term project
- Each member of the partnership recognises that there are potential power imbalances that need to be managed; disagreements are worked through
- The partnership is developed over time and is based on mutual respect and trust
- There is a recognition of the strengths and weaknesses of each organisation and what each can contribute to the project.

Section Three

Implementing a partnership

3 IMPLEMENTING A PARTNERSHIP

This section of the resource provides information about how to implement a partnership. The advice provided is general and applies across a range of different partnership types and models.

3.1 Partnership governance

This section may be useful to understand the initial steps for developing and implementing a Learn Local partnership.

Governance is about decision-making and accountability within an organisation. It relies upon structures and processes to enable the organisation to function effectively. It supports organisations to conform to community and stakeholder expectations about openness and integrity.

In the context of a Learn Local partnership, governance:

- Supports the involvement and participation of all partner organisations
- Maintains communication
- Fosters coordination and cooperation between staff across multiple organisations
- Supports accountability for the goals and activities of the partnership, especially where financial transactions are involved
- Supports oversight of high-risk aspects of the partnership, such as community consultation or engaging consultants.

Governance allows a partnership to function effectively without detracting from the other work Learn Local organisations are undertaking to service their local communities.

3.1.1 Governance structures

The size and composition of the governance structure will depend on the size and nature of the partnership. It will also depend on the risks associated with your partnership. For example, if you are implementing a co-location partnership that involves constructing or renovating new facilities, you may want to establish a project board comprised of senior representatives from your Learn Local organisation and your partner organisation, such as the COM, chair or the CEO.

For less formal or low risk partnerships, a working group may be sufficient to drive activities to support its objectives.

Often, a dual governance structure will be appropriate for implementing a partnership. In this case, you could establish a steering or advisory committee to maintain oversight and a working group to implement and manage the partnership.

Steering or advisory committee

The role of these types of governance structures is to steer, rather than manage. Typical roles for this structure include:

- Providing input into the development of the partnership
- Providing advice and endorsing partnership budgeting decisions
- Identifying and monitoring risks to the project or partnership
- Monitoring timelines and milestones
- Defining and measuring the success of the partnership
- Providing oversight and accountability for activities.

The steering or advisory committee will develop and endorse the key planning documents to guide the partnership, such as the Memorandum of Understanding (for more information, see section 3.3) and work plan (for more information, see section 3.4)

Working group

In contrast to the steering or advisory committee, the role of the working group is to implement the day-to-day partnership activities. Typical roles for the working group could include:

- Administration and reporting for the steering or advisory committee
- Marketing of the partnership activities
- Outreach with local communities
- Program delivery
- Fundraising activities
- Implementation of policies and procedures.

Staff members from each partner organisation should be represented on the working group, and can include volunteer, part and full-time program and management staff. A working group may meet more regularly than the steering or advisory committee, but may be dissolved once the work plan has been achieved.

In the case of Learn Local organisations engaged in a partnership, the manager or CEO may be represented on both the steering or advisory committee and working group. This is often the case for smaller Learn Local organisations. Cross-representation between two levels of the partnership governance structure can ensure each governance group does not work in isolation.

3.2 Developing Terms of Reference

This section may be useful to develop the working arrangements of a steering or advisory committee.

The first agenda item for a steering or advisory committee at its establishment meeting is to develop and agree to its Terms of Reference (TOR). The TOR provides the guiding principles on how members of the steering or advisory committee will engage, discuss and make decisions. While there may be considerable ‘good will’ across the partnership, the TOR serves as an important reminder to all members about how they should show consideration for each partner organisation.

The TOR should generally cover:

- In broad terms, the purpose of the steering or advisory committee
- The frequency and timing of meetings
- The membership, including the role of the chair and how they are selected
- Decision-making processes (for example, if quorum is required for key decisions, whether consensus or majority voting is preferred)
- Conflict resolution
- The roles and responsibilities of members.

The roles and responsibilities of the members on the steering or advisory committee are particularly important. From the perspective of partnership accountability, members should be strongly encouraged to read all papers prior to a steering or advisory committee meeting. This ensures all steering or advisory committee members understand the implications of any decisions made, especially where decisions impact on the operations of individual partner organisations. The Chair has a responsibility to ensure members are informed, and defers decisions in instances where members are not sufficiently prepared.

Being clear about roles and responsibilities is also important for ensuring that members understand their obligations to avoid actual or perceived conflicts of interest. Some members of a steering or advisory committee may be involved in or run a commercial business; in such cases, they should not profit financially from the partnership. Reflecting this expectation in the TOR may help you to avoid having difficult conversations later into the partnership.

Regarding decision-making processes, it is important that the TOR clearly articulates lines of delegated authority. For example, you will need to determine whether decisions made by the partnership steering or advisory committee require approval from the individual COM of partner organisations before they are binding.

Ideally, the TOR should be subject to review annually, especially where there is a significant change in membership or when staff leave a role and are replaced.

The page below provides information for accessing TOR templates.

Additional Information

Existing resources that may assist your Learn Local organisation to develop a TOR:

What: Terms of Reference template

Where: Department of Education and Training website

Recommended search terms:

Department of education terms of reference template

What: Model of terms of reference for community groups (UK)

Where: Canterbury City Council website

Recommended search terms:

Guidance for voluntary and community sector organisations

3.3 Developing a Memorandum of Understanding

This section may be useful to develop the working arrangements for a partnership.

Once you have formed your governance structures for the partnership, you and your partners can develop the Memorandum of Understanding. A Memorandum of Understanding (or MOU) documents the purpose, goals and objectives a partnership. It may also outline any agreement on communication, information sharing and consultation processes. It should also include provisions for dispute resolution (see section 4.3.2) or exiting the partnership (see section 5). Importantly, it is not a legal document although it may identify the authorising environment for the partnership, such as the CEOs of the organisations concerned, or the steering or advisory committee. To help avoid any uncertainty about whether an MOU is legally binding, you should make sure it contains a specific statement to the effect that it is not intended to create legally binding obligations.

If you require a document that is legally binding, it is important that you seek legal advice. If partners agree that the MOU should be legally binding, it effectively becomes a partnership contract. As such, you can use information from this section, in conjunction with legal advice, to develop a partnership contract.

You should draft the MOU with relevant members of the partner organisation/s. Depending on the type of partnership you have entered into and the level of change this represents for your Learn Local organisation, you can also use the drafting of the MOU as an opportunity to engage and discuss the partnership with program or coordinator staff. Establishing buy-in for the goals of the MOU may assist where staff within your Learn Local organisation are undertaking activities to support the partnership. If you have developed a spirit of agreement (see section 2.5), it may be helpful to use this as the basis for drafting the MOU.

The page below provides information for accessing MOU templates.

Additional Information

Existing resources that may assist your Learn Local organisation to develop a MOU:

What: Memorandum of understanding template

Where: Not For Profit Law website

Recommended search terms:

Not for profit law memoranda of understanding

What: Memorandum of understanding template

Where: Department of Education and Training website

Recommended search terms:

Department of education memorandum of understanding

3.4 Resources and responsibilities: Developing a work plan

This section may be useful to document how a partnership will be implemented.

Once the MOU agreement is in place, the steering or advisory committee should develop and implement the work plan. Whereas the MOU documents the purpose, goals and objectives of the partnership, the work plan documents the key activities and milestones required to achieve them.

Template for developing a work plan

A template for a work plan is included in section 7.7. To develop the work plan, the steering or advisory committee should discuss the skills and resources needed by the partnership, when they are needed and who will be responsible for them. For example:

What human resources will be necessary?

- Do you need to employ an outreach worker to engage with the community?
- Do you need to engage more support to manage the accounts associated with funds for the partnership?

What financial resources will be necessary?

- Do the partners have sufficient budget to establish a 'pop-up' shop for the partnership to promote its programs at the local farmer's market? Who will be responsible for the additional fundraising needed?

What technical resources/skills will be necessary?

- Does the partnership need an external facilitator to assist with developing a business plan for co-location? Does the partnership need a graphic designer to create new marketing material? Is legal advice needed on setting up a joint-use agreement for the use of shared facilities?

Your work plan will also require you and your partner organisations to identify key staff who can deliver on aspects of the partnership. Having a good sense of the strengths of your Learn Local organisation and your partner organisation (for more information, see section 2.2) will help you to align your existing resources to the work needed to implement the partnership.

While your partnership will vary depending on the scope of work you have agreed to, you will need to identify key staff against some or all of the following activities. Agreements about these arrangements should be documented in the MOU:

- Strategic planning
- Media and marketing
- Communications
- Policies, procedures and compliance
- Reporting and measuring the partnership performance
- Office administration
- Sourcing additional partnership funds from philanthropic organisations and government
- Facilities management
- Reporting
- Finance.

The work plan should also include other key milestones that partners need to monitor and respond to such as reporting milestones for grants received to support the partnership. In the case of partnerships supported by a grant, the lead partner is responsible for managing the funds and for reporting and acquittal.

In addition to providing clarity on accountabilities and timelines, the work plan also provides a useful framework for reporting to the steering or advisory committee. The working group can then communicate what activities have been implemented and where there might be challenges to implementation.

TIPS

Developing a useful work plan

The usefulness of your work plan depends on you and your partnership.
Consider the following:

- Be as detailed as possible. If your partnership is undertaking work that is new, it may take time and it may involve a series of steps. For example, you might need to employ someone, or you might need to provide training to existing staff before you can get started. Ensure you include all steps along the way to manage the expectations of all partners.
- Be realistic. In the majority of cases, achieving the objectives of the partnership will take time. Staff who are involved in implementing the work plan will more often than not be working on additional activities above their current workload, such as delivering programs or managing child care. They may also be volunteers, or working only part-time. Recruiting new staff, if needed, is also time-consuming. Ensure you are realistic about how long it will take for key activities to be actioned or you will set your partnership up for early disappointment.
- Be honest when you report on your progress. When you provide the report to the steering or advisory committee about progress, clearly identify what activities are not progressing. One of the key roles of the steering or advisory committee is to provide support through identifying possible solutions to challenges when they arise. Challenges will inevitably arise – including a lack of time to complete the activities – so being upfront will ensure the partnership isn't derailed by issues that can be addressed.

3.5 Marketing and communication for partnerships

This section may be useful for information about how a partnership is communicated to others.

Depending on the nature of the partnership, it may be beneficial for a partnership to adopt its own marketing strategy or brand. A brand can capture the purpose and vision of the partnership through design and key messages while also enabling partner organisations to maintain their own individual identity and relationship with their local community. Marketing the partnership can extend to other benefits, such as cross-promotion of other services offered by partner organisations.

If shared marketing would be of value to your partnership, ensure it is included in the work plan. You will need to develop a plan about how you will communicate the partnership and the frequency of communications.

For more complex partnerships such as co-location, you may also want to engage external expertise (e.g. a graphic designer) to develop logos, letterheads and fliers. The steering or advisory committee should endorse engaging external expertise and discuss when the shared marketing material will be used.

In many communities in Victoria, the internet, and especially social media, has become a vital communication and marketing tool for Learn Local and other not-for-profit community organisations. It can be a great way for your Learn Local organisation to promote its services, and to communicate with your community about its plans for a partnership.

Social media use can bring reputation and legal risks, especially given the lack of control you may have over content once it is posted online.

Additional Information

Existing resources that may assist your Learn Local organisation to implement a partnership:

What: Partnership practice guide: Guide 4 – partnership governance, models and leadership

Where: VCOSS website

Recommended search terms:

VCOSS partnership guide

What: Working with other organisations: Summary of the legal issues to consider when working with other not-for-profit organisations

Where: Not for Profit Law website

Recommended search terms:

Not for profit law working with other organisations

3.6 Case studies: Implementing a partnership

Two case studies are presented below. They provide examples of good practice in relation to implementing a Learn Local partnership. The case studies are further elaborated in section 2.7 (exploring and developing a partnership) and section 4.4 (maintaining a partnership).

CASE STUDY ONE:

Yarra Ridge Learn Local Partnership

After a lengthy period of relationship building, information sharing and discussion, the four managers of the Yarra Ridge Learn Locals decide to work together to formalise their alliance, and prepare written documentation in accordance with their "spirit of agreement."

Given the relatively small number of people involved, they decide upon a working group and establish some Terms of Reference. They meet once a month, taking it in turns to host each meeting at their respective organisations; staff and volunteers involved in the project are also invited.

They begin by developing a Memorandum of Understanding (MOU) which includes the organisational structure and details the contribution, roles and responsibilities of each Learn Local. Because of the lengthy lead-in time – and the discussions they've already had – they are able to develop this quickly and easily. They distribute the MOU to their respective Learn Local committees for feedback to ensure each individual organisation has buy-in to the partnership. Part of this process also involves seeking legal advice, to discuss the particular contractual obligations of partners under the formal strategic alliance partnership model.

They then move onto the details of the project, clarifying content, timelines and budget. They develop a plan for outreach, marketing and promotion and establish a clear structure for the on-going management of the partnership work. At alternate meetings they invite guests to advise on specific areas: a council worker, a long-term tutor and a marketing expert.

Finally, they produce a joint brochure with a new logo and branding advertising the courses and support services available. They work together to distribute the brochure to the local community, and share it on a newly developed "Yarra Ridge Courses and Classes" website. They streamline and centralise the enrolments procedure and develop a pool of tutors who can teach in any one of the Learn Locals.

The response from the community is extremely positive. The new "Yarra Ridge" website receives a tenfold increase in views and there is a subsequent 20% increase in enrolments.

Service users are happy with the range of courses on offer and the additional support services, and staff involved in the project feel a strong sense of achievement and satisfaction.

Elements of best practice

- A 'Spirit of Agreement" is developed and guides the development of the project
- A detailed Memorandum of Understanding is established which includes all the key issues
- There is on-going consultation to ensure all staff have an investment in the project
- Where necessary, external people are invited to contribute advice or expertise
- All four LLs work together closely in a cooperative and collaborate manner.

CASE STUDY TWO:

Clifton Community Cafe

Once the funding is secured for the Clifton Community Café, the partnership establishes a steering committee to guide the implementation of the project and oversee the budget. The steering committee discusses in detail what each partner will contribute to the project and prepares an agreement that covers: resources, space, staffing, volunteers and money. A working group is also established to overseas the day to day running of the project. Given partners have agreed that the Café will be incorporated as a legal entity, partners engage a lawyer to agree on the contractual arrangements of the partnership.

Clifton Neighbourhood Learning Centre and Clifton Youth Centre work with the Philipstown Council to review data gathered by the council that will inform the project. Between them they research the demographics of their potential catchment area and assess the likely customer base for the café. They look at figures for unemployed youth and the areas where those youth are concentrated.

The steering committee reviews the research and suggests a limited trial of one day a week involving a small number of young people. While the trial is underway, the working group starts to develop a more detailed TOR, and clarifies the governance structure and communications policy for the partnership. They meet once a month, but email and talk in between.

A plan for the advertising and promotion of the café is developed, and an outline of the recruitment and training program for the young people. The working group meets with the Ability Group to identify the specific training and support needs of the young people with intellectual disabilities who will be working in the café. This is a new area for the Clifton Neighbourhood Learning Centre and they rely heavily on the expertise of the Ability Group.

After a successful trial period, all members of the partnership agree to run the project for four days a week. They invite the Philipstown Mayor to officially open the café and the local Leader newspaper to cover the story. The young people start to make and sell coffee and, in time, to contribute to the running and management of the café.

Elements of best practice

- Legal advice is sought in order to clarify and put in place the legal arrangements for the partnership
- A steering committee is established which identifies the contribution of each partner in a number of key areas
- Significant research is undertaken before implementation of the partnership
- The project is run on a trial basis to enable all parties to assess the success and challenges of the project before it proceeds
- The specific knowledge base and expertise of the various parties is respected and used effectively.

Section Four

Maintaining a partnership

4 MAINTAINING A PARTNERSHIP

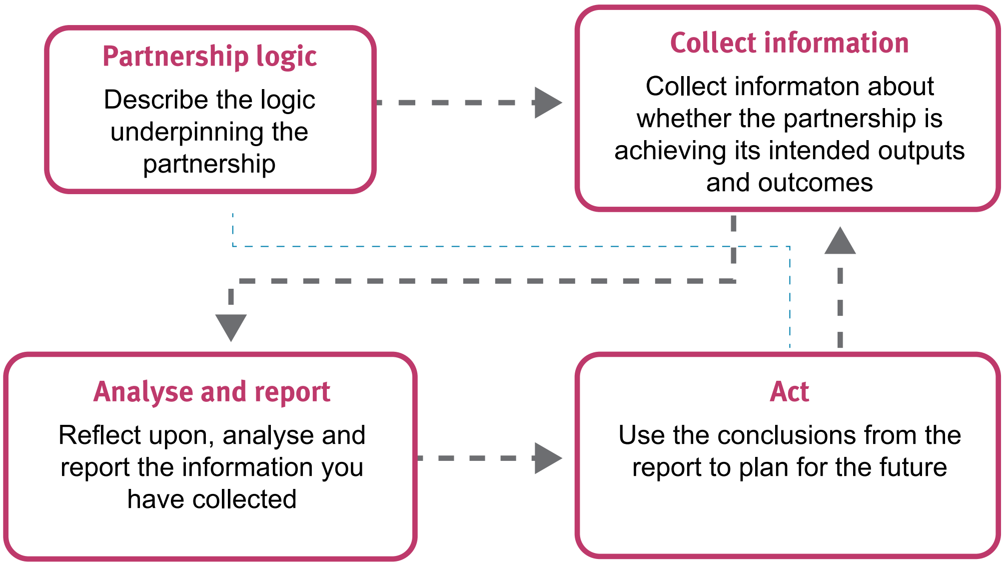
This section of the resource provides information about how to maintain a partnership. It provides guidance for developing a partnership logic to define, measure and monitor the success of a partnership. Risk mitigation strategies are also provided.

4.1 Measuring progress and outcomes

This section may be useful as a framework to understand and measure the success of a partnership.

Continually monitoring the success of your partnership is the best way to ensure its longevity. It gives you the opportunity to collect specific information to make informed decisions about what's working well, what needs to be improved and how improvements can be made. It also increases accountability and transparency.

Ideally, partners will set up the framework for measuring partnership progress and outcomes at the beginning of a partnership, however, if you are in an established partnership with no current framework in place, it can be retrofitted. The partnership logic below offers a framework for defining and measuring partnership progress and outcomes.



4.1.1 Partnership logic

Partnership logic is a tool partners can use to build a high-level understanding and consensus amongst partners about a partnership, and provides a framework for measuring progress and outcomes. It can also be referred to as an outcomes logic model.

A partnership logic unpacks how a partnership would operate in the ideal world. It provides a clear, linear picture of the intended 'theory of change' from the activities and outputs generated through a partnership (what you do) through to the outcomes you would expect to achieve (what happened as a result of what you did).

Template for a partnership logic

A partnership logic template is provided in section 7.8. Instructions for completing the template are provided here.

Context

The first component of a partnership logic is to define the context of the partnership. This can be a brief statement that explains the purpose of the partnership (see section 2.3.1, for further information).

Inputs

These are the things that 'come into' the partnership, including funding, resources, staff, skills, existing relationships. Inputs are typically:

- Human resources – full-time and part-time staff, volunteers, consultants
- Financial resources – grants, budget
- Capital resources – space, buildings, offices
- Services – existing programs
- Technology – computer hardware and software, communications equipment
- Materials – office supplies, consumables
- Knowledge – pre-existing research or knowledge that led to the development of the partnership
- Relationships – pre-existing networks and relationships
- Skills and training – the pre-existing skills of the people who are involved in the partnership.

Partnership activities

Activities are the actions that are needed to implement the partnership. Another way to think about activities is to understand what is being done with the partnership resources (i.e. the inputs). Typical activities include:

- Recruitment of partner organisations and staff
- Creation of a partnership governance model
- Development of a work plan
- Development of a MOU
- Risk assessment
- Development of an outcomes framework.

- Work specific to the partnership, e.g.:
  - Development of marketing and communication strategies
  - Streamlining of enrollment/application forms and procedures
  - Streamlining of referral policies and procedures
  - Development of innovative training/education courses
  - Enrollment of students
  - Compliance.

Outputs

Outputs are produced by the partnership activities. As such there should be a direct link between the activities and outputs articulated in a partnership logic. They are generally measurable and form the basis for collecting information about whether the partnership has completed what it has set out to do. Typical outputs can include:

- A partnership steering or advisory committee/working group/governance group
- A work plan
- A MOU
- A risk assessment framework
- An outcomes measurement framework or partnership logic
- Outputs specific to the partnership, e.g.:
  - Number of staff working in the partnership
  - A communications and marketing strategy
  - Number and type of streamlined enrollment/application forms and procedures
  - Number and type of streamlined referral policies and procedures
  - Number and type of training and education courses
  - Number of classes offered per course
  - Number of students enrolled
  - Number of students attending
  - Confirmation of VRQA or ASQA compliance and confirmation of ACFE Board accreditation.

Short, medium and long-term outcomes

Outcomes are the positive changes that have occurred for people, or partner organisations, as a result of the activities and outputs generated through the partnership. They can be derived from the goals of the partnership but are intended to be more specific and measureable. Measurement of your short and medium-term outcomes will provide insight into whether your partnership is progressing towards or achieving its goals and its overarching purpose.

Short-term outcomes are those that the partnership can expect to achieve immediately. They are not directly within the control of the partnership (these would be outputs) but are immediate changes that could be expected as a result of the activities and outputs. As such, they should be directly linked to the activities and outputs listed. Achievement of these outcomes indicates progress towards the partnership's longer-term goals.

Medium-term outcomes are the changes that are assumed to take place after the achievement of the short-term outcomes. They are often broader than the short-term outcomes and so require a certain leap of faith to attribute the partnership activities and outputs to them.

Long-term outcomes are the ultimate goals of the partnership. These may have already been identified by partners at the beginning of the partnership. As a rule of thumb, there should be no more than two or three long-term outcomes. By definition, they are not within the control of the partnership and are not measurable. They are linked to the partnership by hypothesis and logic only.

Typical short, medium and long-term outcomes might include:

Short-term outcomes	Medium-term outcomes	Long-term outcomes
• Clear and regular communication occurs between partners • Improved cooperation and collaboration between partners • Partner organisations value the partnership • Increased awareness in the community about training and education programs • Increased number of enrollments in education programs • Increased number of referrals from partner organisations • Clients experience more streamlined enrollment and referral across partner organisations.	• Partners communicate openly and transparently • The partnership is resilient • Wider segments of the community participate in our education programs • Clients have better access to training and education that is right for them • Clients are better linked in to the supports they require • Clients receive holistic support across partner organisations.	• Strong relationships, underpinned by trust, respect and openness are embedded into the culture of partner organisations • The community is more engaged in education, leading to improved employment and further training outcomes • Improved mental health outcomes for community members.

Assumptions

Underlying assumptions also need to be documented as part of a partnership logic. The aim is to document the assumptions that underpin the design of the partnership. If some outcomes have not been achieved it may be because some of the assumptions have not held true. Typical assumptions could include:

- The partnership has been adequately resourced
- The partnership will benefit all organisations involved
- Segments of the community do not have sufficient access to education and training options
- Streamlining application, enrollment and referral processes and procedures is an effective way to provide holistic services to our clients.

TIPS

Developing a partnership logic

- If your partnership has developed a work plan, the activities and outputs listed an be refined to list the activities and outputs in the partnership logic template
- If your partnership has articulated a purpose and goals, these can be used to further refine and develop your intended partnership outcomes
- Be realistic about what you can achieve within a particular timeframe
- Since the nature of the partnership may change over time, the partnership logic should be reviewed and refined annually.

4.1.2 Collecting information to measure the success of the partnership

If you have completed the partnership logic template you will have a better idea about the kinds of information you will need to collect to assess whether the partnership is performing as intended.

It may be beneficial to draw up a document that outlines all the information that needs to be collected, how it is to be collected and how often. Some tips are offered below about the kinds of information it could be useful to collect.

Collecting information about whether the partnership has delivered its planned activities and outputs

If your partnership has a work plan (for more information, see section 3.4) this can be used to determine whether the activities and outputs of the partnership have been achieved within their intended timeframes. Partner organisations may already collect data that can be used to assess whether the partnership has delivered its intended activities and outputs, such as student enrollment data. It may also be necessary to collect new information. For example, if a partnership has been implemented for the purpose of creating a single point of contact |for clients across organisations, it may be beneficial to collect information about the number and nature of client referrals.

Collecting information about whether the partnership is achieving its outcomes

For partnerships that have been in place for less than one year, information should be collected on the achievement of short-term outcomes. Medium-term outcomes should be assessed after the second or third year of a partnership and information collected should be longitudinal (i.e. measuring change over a period of time). Long-term outcomes are usually aspirational. As such it may not be appropriate to assess them.

If you have completed the partnership logic template, you can develop a set of questions to assess the extent to which the partnership has achieved the stated outcomes. These questions can be asked of the relevant stakeholders through a survey, interview or focus group. An example of the kinds of questions that can be helpful to ask is provided below.

Example questions to assess partnership progress:

Short-term outcome from partnership logic	Questions to assess whether the outcome has been achieved	Method
Clear communication occurs between partners	To what extent do you agree to the following? • Information sharing between partner organisations is effective? • Since the partnership was implemented, I have a greater understanding about the work of the organisations in the partnership? Scale: Strongly disagree, Disagree, Neutral, Agree, Strongly agree In what ways has communication between partner organisations improved over the past year? In what ways could communication between partner organisations be improved?	Survey / interview of staff from partner organisations

TIPS

Collecting information to measure the success of the partnership

- Ask quantitative questions e.g. to what extent do you agree…
- Ask qualitative, open-ended questions e.g. in what ways…, please provide an example of…
- Focus on the positives by asking what's working well
- Ask questions to test the assumptions underpinning the logic of the partnership
- The following kinds of data may be useful:
  - Surveys, interviews and focus groups of key stakeholders e.g. staff and clients
  - Existing data collected by partner organisations e.g. administrative data, work plans and annual reports
  - Case studies
  - Photographs
  - Observations
- Consider whether ethics approval and consent is required to consult with some stakeholders e.g. vulnerable members of the community, or young people
- Ensure confidentiality and de-identification of data collection where appropriate
- Build information gathering tools into existing forms/applications or processes if possible.

4.1.3 Assessing, reporting and acting upon the information you have collected

Once the information you have collected has been collated, you may find it helpful to plan a report structure under the following headings:

- Achievement of activities and outputs
- Achievement of short-term outcomes
- Achievement of medium-term outcomes
- Partnership strengths and areas for improvement
- Key findings and recommendations.

If you have completed the partnership logic template, you can use it as the basis for analysis and reporting. This should help you to interpret the data with the goals of your partnership in mind. Share the report with key stakeholders to ensure that your conclusions make sense to them.

Annual partnership planning days can be an ideal opportunity to use the report findings to reflect on the progress of the partnership and the outcomes it has achieved. They can also provide an evidence-based platform upon which some of the activities and outputs for the following year can be planned.

For more information about annual partnership planning days, please see section 6.6.

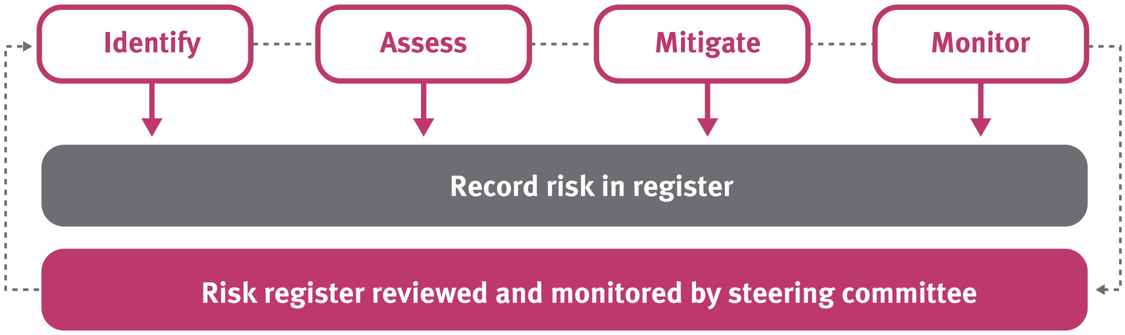
4.2 Risk management and mitigation

This section may be useful to consider and manage partnership risks.

When organisations come together in a partnership, there are a number of factors that may negatively impact on its effectiveness, regardless of the type or model of partnership involved. For example, there could be divergence in organisational cultures, differing expectations and goals, and power imbalances in relationships between individuals and organisations. These can limit genuine participation and create a lack of trust amongst partners. The importance of developing robust risk mitigation strategies is therefore central to maintaining a partnership.

This section provides a risk mitigation framework and information about how the framework can be embedded into a partnership. It also provides advice about a number of risk mitigation processes that could be helpful including induction planning, dispute resolution processes, and negotiating power imbalances.

4.2.1 Risk register



Risk register

A risk register template is provided in section 7.9. Instructions for completing the template are provided here.

Identify

Risk management is a process that would usually be managed by the partnership's steering or advisory committee or governance board. If partners have identified and documented initial risks as part of the exploration and development process (for more information, see section 2.3.4) these could be incorporated into the risk register template.

Work with your partners to identify risks to the partnership, and include different people from different aspects and levels of the organisations. Document anything that could prevent the activities and goals of the partnership from being achieved. The risk register template provided in section 7.9 includes some risks that are common to Learn Local Partnerships.

Assess

Once partners have documented all risks, it may be appropriate to assess the level of risk. You can do this by considering whether each risk has a low, medium or high likelihood of occurring and whether the consequences of it occurring are low, medium or high. The steering or advisory committee should regularly assess the risk level to determine whether the likelihood or consequence has changed. Risks that are assessed as ‘low to medium’ likelihood and ‘low to medium’ consequence may only require occasional monitoring and are unlikely to require significant application of resources. Risks assessed as ‘medium to high’ likelihood and ‘medium to high’ consequence may warrant an extensive risk mitigation strategy or immediate action.

Mitigate

Risks can be prevented, reduced or accepted. Risk prevention involves putting measures in place to prevent the risk from having any impact. Risk reduction involves putting measures in place to reduce the likelihood or consequence of the risk occurring. Risk acceptance involves agreement between partners to accept the consequences of a risk because it does not outweigh the benefits of partnership. In some circumstances it may be necessary to set aside contingency resources to be used if a risk occurs. The risk register template in section 7.9 provides some mitigation strategies to common risks that face Learn Local partnerships.

Monitor

There should be regular opportunities for the partnership, most often through the steering or advisory committee, to monitor and re-assess the risks in the risk register. This should include a re-assessment of the likelihood and consequence of existing risks and the effectiveness of the mitigation strategies. New risks should also be considered and added to the register. It can be beneficial to list risk monitoring as a standing agenda item at particular points in time over the year in the partnership work plan (for more information, see section 3.4).

4.3 Other risk management considerations

This section may be useful for inducting new people into a partnership and managing disputes and power imbalances.

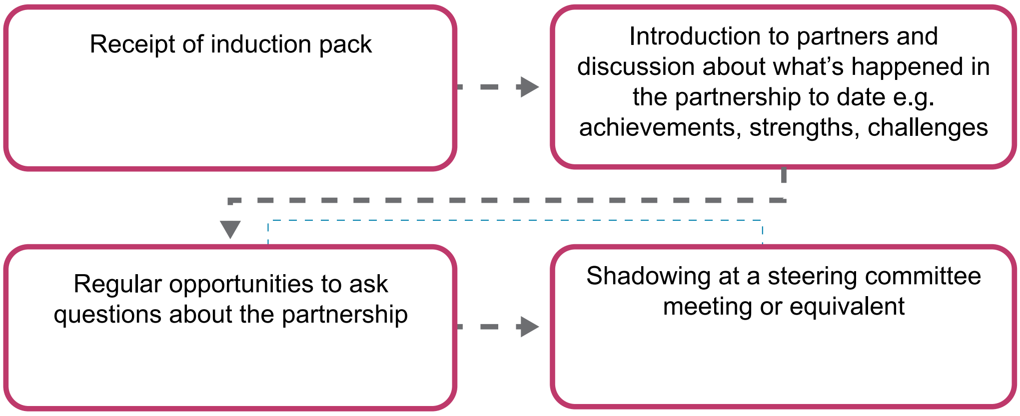
4.3.1 Induction planning

When a key person who is instrumental to the day-to-day running of a partnership leaves an organisation, there is a risk that the partnership will suffer. Often, this is because the driving force behind the partnership was embedded in the person, rather than the organisation. One way to mitigate this risk is to ensure partnership induction processes are in place for relevant new staff. It can also be helpful to give partners advanced warning about a change in staff and to let them know that it may take time before the new staff member gets up to speed.

Below is an example of a simple partnership induction process. Ideally, the staff member overseeing the induction would be the key person who is leaving the organisation or someone else who has had strong involvement in the partnership. Before the induction, it would be useful to prepare an induction pack, which includes key documentation from the partnership, such as:

- The MOU/partnership agreement, TOR, reports etc.
- Information that clarifies the new staff member's role in the partnership
- Any resources created through the partnership (e.g. information flyers, marketing plan)
- Meeting schedules/important dates
- Recent/relevant meeting minutes.

It may also be appropriate to update the TOR to include the new staff member.



4.3.2 Dispute resolution

Partners should agree to a specific process for quickly resolving disputes should they arise. A common partnership dispute resolution process is outlined below.

Acknowledgement and negotiation

In the first instance, partners should attempt to settle a dispute internally by acknowledging the issue and discussing strategies to address the issue. There are no specific processes to follow when attempting to negotiate an issue internally. As a general rule, ensure that all relevant parties' views and perspectives are heard.

Mediation

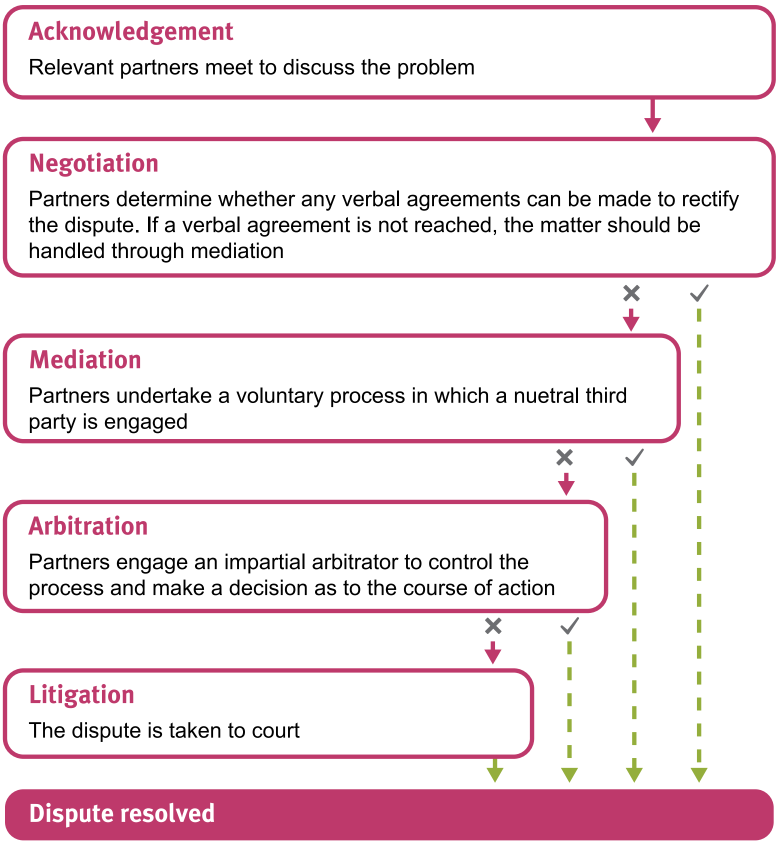
This involves the use of a neutral, third-party to facilitate negotiation between parties. The role of the mediator is to help parties explore different ways of resolving the issue. If mediation is used, it is important that all of the relevant details of the dispute are documented. It may be appropriate to seek legal advice from this point of the dispute resolution process onwards.

Arbitration

If agreement cannot be reached through mediation, partners can enter a process of arbitration to avoid taking the dispute to court. Arbitration involves the submission of the dispute to a neutral, third-party who controls the process and makes a decision about the dispute. The decision can be legally binding if parties have previously agreed to be bound by the decision.

Litigation

The final process for dispute resolution is for parties to file a lawsuit and settle the matter in a court.



4.3.3 Negotiating power imbalances

Partnerships involving organisations of different sizes (e.g. funds, people, skills, knowledge, and infrastructure) will invariably face an imbalance of power in the relationship. Where this is the case, the first step in managing this imbalance is to acknowledge that it exists. This could be a conversation between partners at a steering or advisory committee meeting or equivalent, where partners discuss where the imbalances lie and what implications they may have for the partnership. Key points of consideration for Learn Local partnerships may include:

- The relative capacity for partners to contribute cash and in-kind resources to the partnership
- The impact of a partnership on the identity of partner organisations
- The impact of a partnership on the geographical boundaries within which a Learn Local operates.

Once these issues have been discussed, it may be appropriate to document working agreements that encapsulate the power imbalances, such as the number of meetings a smaller organisation can attend, or develop specific risk-mitigation strategies to reduce the likelihood of an issue negatively impacting upon the partnership.

Additional Information

Existing resources that may assist your Learn Local organisation to maintain a partnership:

Partnership practice guide: Guide 3 – sustaining the partnership

VCOSS website

Recommended search terms:

VCOSS partnership guide sustaining the partnership

Addressing problems: Partnership troubleshooting

Department of Education and Training website

Recommended search terms:

Addressing problems partnership troubleshooting

4.4 Case studies: Maintaining a partnership

Two case studies are presented below. They provide examples of good practice in relation to maintaining a Learn Local partnership. The case studies are further elaborated in section 2.7 (exploring and developing a partnership) and section 3.6 (implementing a partnership).

CASE STUDY ONE:

Yarra Ridge Learn Local Partnership

Once the program is up and running successfully, the working group identify two clear tasks: to look after, maintain and develop the on-going partnership, and to manage, administer and evaluate the joint project.

Regular, formal, minuted meetings are held to review the partnership against the original spirit of agreement and MOU. Each individual Learn Local is provided with an opportunity to share successes, failures and concerns. While acknowledging the importance of the partnership for long-term sustainability, the working group is also keen to ensure that the individual identity of each organisation is maintained.

There is discussion about how the partnership is working and whether it can be improved; the original goals and activities of the partnership are reviewed and adapted. Clear lines of communication are established and, where disagreements or conflict arise, managers formally mediate between parties. If necessary, formal dispute resolution procedures are used.

Once a year, the four Learn Locals get together for an externally facilitated planning day. This provides another opportunity to deal with any issues that may have arisen, and to formally assess the success or otherwise of the partnership. The Learn Locals jointly evaluate the outcomes of the previous year and set goals for the year ahead.

The project is constantly monitored both formally and informally, with a detailed evaluation undertaken at the end of the first year. Numbers of website views and enrolment in courses continues to rise.

Written evaluations by service users show an increased level of satisfaction with the courses and services Yarra Ridge offers. The local Leader newspaper covers the story of the partnership and confirms the reputation of Yarra Ridge as a relevant, quality education provider. After the first six months of implementation, local employers start to approach Yarra Ridge looking for future employees.

Elements of best practice

- The project is constantly measured against its original purpose and goals
- Aspects of the project are changed or adapted where necessary
- A process is in place for dealing with different levels of conflict or disagreement
- Formal and informal qualitative and quantitative evaluation is undertaken
- Lessons from past practice are incorporated into future planning.

CASE STUDY TWO:

Clifton Community Café

Once the café is up and running the partnership is able to concentrate on the on-going maintenance of the project. The steering committee still provides big-picture advice, but takes a back seat to the working group.

Key decisions about the partnership and key learnings are recorded and disseminated to partners, members of the COM and staff once month. This is particularly helpful for new staff and ensures the smooth continuation of the project when Navid leaves suddenly owing to ill-health.

The working group starts to develop some specific deliverables and Key Performance Indicators (KPIs) and establishes an evaluation framework. A weekly record is kept of issues that arise in the café both in relation to the young people employed there, and the administration and management of the café. Staff are encouraged to record the successes as well as the problems.

Feedback is sought from the young people themselves and from their supervisors. The number of customers using the café is recorded and, periodically, customers are asked to complete a short written survey.

After the young people have worked in the café for six months a detailed questionnaire is sent home which they complete in conjunction with their parents. This provides the partnership with some excellent qualitative data that can be measured against their KPIs.

The evaluations suggest that working in the café is providing the young people with a pathway to paid employment as hoped. There are other positive, unexpected outcomes. The young people are more involved in the local community and are also participating in courses run by the Clifton Neighbourhood Learning Centre. The partnership is able to report all these findings to their funding body.

Bianca and the Ability Group are particularly heartened to note that the young people with intellectual disabilities have surprised everyone and are making a valuable contribution to the project and are indeed ‘blossoming’.

Elements of best practice

- The steering committee and working group are able to adapt easily to the different stages of the project
- Effective strategies are implemented to manage staff changes
- Good, varied quantitative and qualitative data is gathered and used effectively to measure outcomes of the project
- There are some important unexpected positive outcomes that can reasonably be regarded as the result of a well-run project.

Section Five

Exiting or dissolving a partnership

5 EXITING OR DISSOLVING A PARTNERSHIP

This section may be useful to set up processes for exiting or dissolving a partnership and maximising learnings from a partnership.

Most partnerships will eventually come to an end. This may be because the partnership was time-bound, because it achieved the goals it set out to achieve, or because it was no longer beneficial for a partner or all partners. As such, partners should adopt an agreed process for exiting or dissolving the partnership.

The process will be dependent on the partnership model. For example, ending or exiting a non-distributing cooperative partnership will involve more rigorous processes and may have legal implications that will need to be addressed. By contrast, ending or exiting a formal strategic alliance partnership is relatively straight forward, and will likely not have legal implications. In either case, there are common elements that can be agreed upon and adopted regardless of the partnership model.

5.1 Setting up an exit strategy

Partners should agree to a specific process that is articulated in the MOU (for more information, see section 3.3). This would generally include the following information:

- The grounds that would result in the termination of a partner's involvement or an end to the partnership
- The steps to be taken to end the partnership, such as:
  - A dissolution period where no new business is conducted by an exiting partner or by the partnership itself
  - A winding-up period where assets are collected and distributed and liabilities are paid and/or distributed, or where an exiting partner's equity interest is cached out
  - Termination of the partnership or a partner's involvement via a termination agreement
- The rights and obligations of partners in the process, such as:
  - Communicating the reason for the termination of the partnership or partner's involvement
  - The period of notice required for terminating the partnership or a partner's involvement
  - How the value of an exiting partner's equity interest will be determined and the manner in which they will be paid
- What happens to any partnership resources, including funds, people, skills, knowledge, programs and infrastructure
- How decisions about the dissolution of the partnership or exiting of a partner will be communicated to relevant stakeholders.

5.2 Before making the decision to exit the partnership

If your Learn Local organisation has determined that the partnership is not providing the intended benefits that it ought to, it may be worthwhile considering whether there are elements that could be fixed, before making the decision to terminate the partnership or a partner's involvement. It could be that there are relatively simple changes that could be made to turn the partnership around. Section 6.6 includes a process for reflection and future planning. While this section is labelled as an 'annual planning day,' the process may be appropriate to undertake at any time of the year.

5.3 Consolidating learnings from a partnership

Every partnership experience will provide invaluable learnings, regardless of whether it was considered successful or not. The best way to capitalise on these learnings is to review the partnership once it has been dissolved or once your Learn Local organisation's involvement has ceased. It might be beneficial to develop a survey that asks key stakeholders about the strengths and weaknesses of the partnership, and what could be applied to future partnerships. For more information about measuring the success of a partnership, please see section 4.1.

5.4 Celebrating the partnership

Once the partnership has been dissolved or once your Learn Local organisation's involvement has ceased, it can be worthwhile to celebrate the success of the partnership. This may include formally recognising key people involved, acknowledging outcomes and failures and discussing future partnership opportunities with the organisations involved.

Additional Information

Existing resources that may assist your Learn Local organisation to end or dissolve a partnership:

Dissolve a partnership: End your partnership legally to avoid future financial problems

Business Victoria website

Recommended search terms:

Business Victoria dissolve a partnership

Section Six

General tips and tricks

6 GENERAL TIPS AND TRICKS

This section provides general Learn Local partnership tips and tricks.

6.1 Networking and promoting your Learn Local organisation

If you're not at the stage where you know with which organisation/s you would like to explore partnership, it might be beneficial for your Learn Local organisation to increase the amount of networking it does. This could include:

- Attending Learn Local/ACFE provider regional forums
- Attending conferences organised by peak bodies and associations
- Picking up the phone and organising an informal catch up with people from other relevant organisations to get a better understanding about the services they provide and to explain the services your Learn Local organisation provides. This could include meeting with:
    - Other Learn Locals in your area or Local Government Area
    - Other education providers, such as Registered Training Organisations
    - Schools
    - Council
    - Other service providers, such as those providing mental health services or drug and alcohol support.
- Undertaking a mapping exercise to identify which organisations in your area may be suitable for a partnership.

Have some informal conversations about the work you do, what services you deliver and to whom, and ask them about their work. Once you begin to form relationships with people in the sector, it should be easier to explore what partnership opportunities exist.

6.2 Strong, effective partnerships take time

The documented working arrangements of a partnership, such as TORs, MOUs and a spirit of agreement can be developed over a relatively short period of time. What does take time to develop are the human aspects of partnership that are necessary for success. These include strong relationships between partners underpinned by trust, respect, open, honest and regular communication, effective leadership, and a shared purpose and vision. TORs, MOUs and a spirit of agreement can become the framework through which these aspects are developed. While they do not guarantee that your partnership will be successful, they will give it the best chance of succeeding.

With this in mind, it is important to recognise that once the working arrangements of a partnership are established, it may take some time for trust to be developed, for open and honest communication to occur and for strong relationships to be formed. A strong partnership also requires a shift in the culture of an organisation; this too can take time. Try to be as realistic as possible when setting milestones or partnership deliverables. Change will not happen overnight.

6.3 Communication between a committee of management and the CEO/manager

Often (but not always) the CEO or manager of a Learn Local will drive partnership activities. Where this is the case, it is vital for the COM to be engaged and on-board from the initial stages of partnership development. There are a number of key factors the COM will need to consider before it approves a partnership opportunity. These include, but are not limited to the following:

- The appropriateness of the partnership
- The partnership purpose and vision
- The potential benefits of the partnership
- The potential risks the partnership poses, such as the implications for:
    - The identity/brand of the organisation
    - The organisation's reputation
    - Power and decision-making abilities

Sections 2.3 and 2.4 of this resource provide information about how to gain clarity on these issues and how they can be documented for your COM's consideration.

6.4 Communication between partner organisations

Ensure there is open and regular communication between partner organisations and staff at different levels within each organisation. Strategies to achieve this include:

- Providing relevant staff with the opportunity to contribute to decision making where appropriate
- Regular email updates about progress to all staff members/volunteers involved in the partnership
- Developing formal channels for regular communication and information sharing (e.g. regular meetings)
- Thinking about whether it is appropriate for one person from each organisation to be a central conduit for formal communication between partners to avoid miscommunication
- Exploring various free web-based products to improve communication efficiency between partner organisations:
    - Google Groups (for facilitating and recording online discussions and sharing documents)
    - Drop Box or Google Documents (cloud-based services for sharing and storing files including documents, photos and videos)
    - Google Calendar (a shared calendar for setting reminders and keeping track of meetings and other important events)
    - Survey Monkey (an online survey tool which could be used to collect evidence in order to measure the success of your partnership).

6.5 Meeting processes

Meetings are one of the main channels through which partners communicate. The most important decisions about a partnership will usually be explored during steering or advisory committee/working group meetings or planning sessions. Below are some meeting processes that your Learn Local organisation may find useful for holding effective meetings.

Before the meeting

- Have a clear invitation that articulates an objective (if there is an agenda make sure it is known to those participating and that any relevant background documentation is circulated along with the agenda)
- Ensure the right people are in the room (who is important to have at the table for these discussions?)
- Put times to the agenda items so everyone knows how long each discussion is estimated to take
- Have a clock that is visible to everyone so everyone can share in the responsibility of keeping time.

During the meeting

- Dedicate three roles at each meeting: chairing or hosting, minute taking, and time keeping
- Rotate the roles so everyone gets a chance to experience the responsibility of chairing, taking the minutes and time keeping
- Include a 'check-in' at the start of the meeting and a 'check-out' at the end of the meeting so everyone gets a chance to speak. The check-in could include asking people what they hope to gain from the meeting and the 'check-out' could include asking people the most important thing they'll take away from the meeting.
- Consider a set of agreements:
  - One person speaking at a time (and no side conversations)
  - Listening to understand
  - Speaking intentionally
  - Read these out at the start of each meeting to remind everyone and welcome newcomers to your meeting culture
- Start and end the meeting on time
- Ensure everyone has a chance to participate fully. For important decisions consider going round the table to hear from each participant and use a straw/thumb vote system to help establish the level of agreement: thumbs up = agree, thumbs down = don't agree, thumbs sideways = more information/discussion required.
- Thank everyone for their participation and appreciate those who volunteer for tasks
- Consider appointing the roles for next meeting at this meeting while you have everyone present and attentive.

After the meeting

- Write up and distribute minutes as close to the meeting time as possible to keep momentum going and to remind everyone of the tasks they agreed to complete
- Consider using a meeting template to document meeting actions, the person responsible for each action, and the timeframes within which the actions are to be completed.

6.6 Annual reflection and planning days

Allocating time for reflection and planning for the future can be very beneficial for a partnership. It allows partners to:

- Reconnect to the purpose of the partnership
- Celebrate achievements
- Reflect on their experience of the partnership
- Think about the ways in which the partnership has developed, the ways the service environment might have changed, and what this means for the direction of the partnership
- Incorporate evidence and learnings from the previous year into planning for the future.

A typical partnership planning and reflection day would be facilitated by an external person to ensure that power relationships do not impact on the quality of discussion, and to ensure that every partner has the opportunity to contribute. A planning day might also involve the following:

Reflection

- Review of the operational environment:
  - What changes have occurred internally that have impacted on the partnership?
  - What is different about the current service environment compared to this time last year?
- Overview of the work plan:
  - What activities and outputs have/have not been achieved?
- Overview of findings from any evaluations/reviews/feedback that explores partnership outcomes (see section 4.1):
  - What outcomes/goals, Key Performance Indicators (KPIs) have/have not been achieved?
  - Has the environment changed so the expected outcomes did not eventuate?
  - Do the outcomes/goals, KPIs need to be changed or adjusted?
  - Were there any unintended benefits or outcomes realised?
  - What are the key learnings that should be considered into the future?
- Review of the Terms of Reference (see section 3.2):
  - Does the purpose and role of the steering/advisory committee need to change?
- Review of the Memorandum of Understanding (see section 3.3):
  - Do the purpose and goals in the MOU require updating?
  - Do the roles and responsibilities of partners need to change?
  - Are the partnership roles and responsibilities allocated to the right people or partners?
- Review of the risk register (see section 4.2):
  - Do risks need to be removed or added?
  - Do the likelihood and consequence of partnership risks need to be reassessed?

Planning

- What should the partnership start doing?
  - What implications do the environmental changes we have identified have for our work?
  - What activities will we need to undertake to progress the new goals/outcomes we have identified?
  - Are there new or innovative ways that we could be working?
  - Do we need to improve the way we are working in some areas of the partnership?
  - Are there any other people or organisations that should be involved in the partnership?
- What should the partnership keep doing?
  - What are we doing well that we should keep doing?
  - What activities and goals/outcomes still need to be achieved?
- What should the partnership stop doing?
  - What are we not doing well that we should stop doing?
  - What activities and goals/outcomes are no longer relevant?
  - What goals/outcomes have now been achieved and what does this mean for the partnership activities and outputs?
- Update the work plan (see section 3.4):
  - Document activities to be undertaken for the coming year based on agreements during the annual reflection and planning session.

6.7 Where to get support

This section may be useful to understand where and how to seek support for your partnership

At some point during the life-cycle of the partnership, you or your partnership organisation/s may require external support or advice. This may involve informal advice from your Regional Office of the Department of Education and Training.

6.7.1 Seeking legal advice

The nature of the partnership will dictate whether your Learn Local organisation should seek legal advice. Partnerships with higher levels of integration, such as co-location of facilities, must seek legal advice before any contractual agreement is signed.

Additional Information

For a summary of the legal issues you should be aware of see:

Working with other organisations: Summary of the legal issues to consider when working with other organisations

Where: Not for Profit Law website

Recommended search terms:

Not for profit law working with other organisations

6.7.2 Seeking a consultant

Prior to sourcing an external consultant you and your partners should develop a clear idea of the skills or knowledge you require and for what period of time. Engage your partner organisations in an open dialogue about the need for external support and about their preparedness to contribute to the financial cost of this support. It is important to have this conversation before you source the support; raising the question of payment may be, at best, uncomfortable or, at worst, damaging to the partnership, if you leave the discussion until after an invoice has been issued.

Ideally, once you have identified the need for additional support with your partnership organisations, you should develop a scope of requirements. This may only be a page, but should identify what is needed in terms of skills and deliverables (the tangible output, such as a plan or strategy), the required timeframe and the budget available. This will help manage expectations when you come to engaging potential consultants.

6.7.3 Engaging a facilitator for dispute resolution or planning sessions

If your partnership starts to break down, or you need to have open and honest discussions about the direction your partnership is taking, there can be clear benefits from engaging a facilitator to work with you. A facilitator can:

- Ask the difficult questions and challenge the assumptions and beliefs of the group. This allows your partnership to address the key issues that are stopping you realising your goals.
- Use their coaching skills to listen actively, ask questions, and paraphrase and synthesise the ideas of the group. This improves communication within your partnership and keeps all partners focused on what is required rather than focused on who is to 'blame.'

Ensure you develop a scope of requirements before you commence discussions with potential facilitators.

Section Seven

Templates

7 TEMPLATES

The templates provided in this section are designed to assist your Learn Local organisation at various stages of partnership.

By clicking on this icon, you can navigate back to the template's relevant section in the package.

All of the templates in this section have editable versions that can be accessed via the Microsoft Word-based version of this resource.

7.1 Assessing your Learn Local organisation's readiness to partner

UNDERSTANDING YOUR LEARN LOCAL ORGANISATION'S READINESS

The key strengths and weaknesses of our Learn Local organisation are…

Hint – these could be strengths in people, skills, resources, and services provided. Weaknesses could include a lack of skills or expertise in areas of your business (e.g. marketing or payroll) or a particular cohort in your community that you have difficulty servicing.

Our organisation can accomplish more by implementing a partnership…

Could we attract learners or community members who are currently out of reach of our Learn Local organisation?

Could we strengthen referral and learning pathways for people accessing services our Learn Local organisation provides?

Could we increase our organisational capacity by combining back of house services with another organisation (e.g. finance, human resources, marketing)?

What else could we accomplish through partnership?

Hint – what aspects of our strategic plan could be advanced by pursuing a partnership?

What are the possible opportunity costs of undertaking a partnership?

Hint – if we decide to pursue a partnership, what other activities or achievements will be restricted as a result?

Page 1 of 2

See section 2.1

UNDERSTANDING YOUR LEARN LOCAL ORGANISATION'S READINESS

How ready are we?

	✓ or ✗
Our Learn Local organisation has sufficient capacity to undertake a partnership Hint – think about the capacity of your part-time staff, the Learn Local Organisation manager, and the COM	
(If no) What would we need? Hint – this could be fundraising or access to philanthropic or government funding, or in-kind support	
Our Learn Local organisation would be able to contribute resources to a partnership Hint – this could be people, skills, knowledge, programs, or infrastructure	
(If yes) What resources could we contribute to a partnership?	
Our Learn Local organisation has previous partnership experience	
(If yes) What have we learned from previous experiences that should be considered or applied to a new partnership?	
Key staff members at our Learn Local organisation are open to the possibility of exploring partnership opportunities	
(If no) Why are key staff members not open to the possibility of exploring partnership opportunities?	

Page 2 of 2

See section 2.1

7.2 Understanding your partner organisation

UNDERSTANDING YOUR PARTNER ORGANISATION

Snapshot information about the potential partner organisation/s

What are the key services delivered by our organisation?

Where are they delivered and to whom?
Hint – this could be pre-accredited as well as other community programs

What are our organisation's values and vision?

What are our organisational strengths and weaknesses?
Hint – these could be in skills, resources, and pre-accredited and accredited programs

What type of organisation are they? (e.g. Learn Local, council, RTO, school)

What are their organisational values and vision?

What are their organisational strengths and weaknesses?

What is the history between our organisations?

Page 1 of 2

See section 2.2

UNDERSTANDING YOUR PARTNER ORGANISATION

Considering the above information…	ORG 1 (✓ or ✗)	ORG 2 (✓ or ✗)	ORG 3 (✓ or ✗)
Are there opportunities to reduce the duplication of services or programs in our area?			
Are there opportunities to address service gaps in our area?			
Are there opportunities to improve referral and learning pathways for learners and other community members?			
Are there opportunities to share human resources and/or administrative functions?			
Are there opportunities to jointly deliver a service or program?			
Are there opportunities to improve the delivery of a current service or program?			
Are there opportunities to share or combine infrastructure?			

Are there any other potential synergies?

Do our organisations have similar aspirations for our communities? Hint –do we have similar objectives for our communities?			
Are our organisations a good fit? Hint – do we have similar goals, ideologies and values?			

In what other ways are our organisations a ‘good fit’?

If our organisations have worked together before, did we work well together? Hint – did we share a common purpose or vision, could we communicate openly and honestly, did we develop a sense of trust and respect?			

If there is history between our organisations, what are the positive and negative aspects about our history that we can build upon and/or learn from?

In what ways could a partnership improve our organisations by utilising our strengths and supporting each other’s weaknesses?

See section 2.2

7.3 Defining the purpose of the partnership

DEFINING THE PURPOSE OF THE PARTNERSHIP

Snapshot information about the potential partner organisation/s

What do partners most want to achieve through the partnership? Hint - what are the aspirations for the partnership?
What are the limits for the scope of the partnership?
What is reasonable for us to achieve?
Who are the key stakeholders (e.g. beneficiaries of the partnership) and what will a partnership achieve for them? Hint – this could be your learners, your volunteers, your broader community or the prospective community members you wish to attract
What values or principles from partner organisations can and should be incorporated into the partnership?

Considering the answers to the above questions, the purpose/s for the partnership is/are…

Page 1 of 1

See section 2.3.1

7.4 Identifying initial partnership risks

IDENTIFYING INITIAL PARTNERSHIP RISKS

Initial risks...

Does the financial viability of potential partner organisations need to be considered for this partnership to succeed?
Hint – annual reports or other documents may provide some insight but should be supplemented by an open and honest conversation with your potential partners

Are any of the potential partner organisations experiencing legal issues that could negatively impact on the partnership?

If the partnership involves joint employment of staff or use of infrastructure, what are the implications for the partnership?
Hint – it may be necessary to access property information and employment contracts

If our Learn Local organisation decided to pursue the partnership, what is non-negotiable?
Hint – this could be about ensuring all current staff are retained, that your brand is maintained, or that your Learn Local organisation retains the ability to make decisions about particular aspects of its operations

What compliance implications could this partnership have?
Hint – will the partnership impact on VRQA or ASQA compliance and ACFE Board registration?

What implications could the partnership have on existing contractual arrangements?
Hint – will the partnership impact on current contracts with government?

Will it be necessary to seek legal advice before committing to the partnership?
Hint – partnerships that are being incorporated as stand-alone, legal entities should seek legal advice

What other risks might the partnership have for our organisation and for our clients?

Considering the answers to the above questions, the initial risks of the partnership are…

Considering the initial risks identified, the strategies to mitigate these risks are…

Page 1 of 1

See section 2.3.4

7.5 Spirit of agreement template

SPIRIT OF AGREEMENT TEMPLATE

Spirit of agreement

The justification for the partnership is….
Hint – outline what your Learn Local organisation cannot achieve without the partnership

The purpose of the partnership is…

The partnership model we have decided to implement is…

The goals of the partnership are...

The initial activities of the partnership will be…

The partnership will be resourced in the following ways…
Hint – what resources (funds, people, skills, knowledge, and infrastructure) have partners committed and will other funds (e.g. philanthropic, fundraising or government) be accessed?

See section 2.5

SPIRIT OF AGREEMENT TEMPLATE

Spirit of agreement

The roles and responsibilities required to undertake the partnership are…

Lead partner is:

ROLE	NAME AND	RESPONSIBILITY

The initial partnership risks are…

The strategies to mitigate these risks are…

Agreement made on: _______________

Signed by: _______________ _______________

On behalf of: _______________ _______________

See section 2.5

7.6 Quick checklist for considering whether to pursue a partnership

To use this checklist:

Indicate with a ✓ or ✗ if your Learn Local organisation has considered the following issues. Where you have marked ✗ take notes in the column furthest to the right outlining the course of action to be taken.

CONSIDERING WHETHER TO PURSUE A PARTNERSHIP

Things to consider when deciding to pursue a partnership	✓ or ✗	Notes or action to be taken if ✗
Our organisation is ready to consider partnership	☐	
The reasons for entering into the partnership are clear and valid for all partners	☐	
The organisations are likely to be a 'good fit'	☐	
The strengths of each organisation have been discussed between partners and these strengths are being aligned to partners' potential roles in the partnership	☐	
The weaknesses of each organisation have been acknowledged between partners	☐	
The purpose behind the partnership is clear for all partners	☐	
Partners have initially agreed to a clear set of partnership goals	☐	
Partners have agreed on a lead partner	☐	
Initial risks have been identified by key partners and initial strategies have been mapped out to mitigate these risks	☐	
Partners have discussed whether it is necessary to seek legal advice about the partnership arrangement	☐	
The COM/leadership at each organisation has agreed to the partnership	☐	
Partners have initially mapped out and allocated the roles and responsibilities that will be required to implement the partnership	☐	

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See section 2.6

7.7 Developing a work plan

The template below can be adapted to develop a work plan for your partnership. It can be expanded for partnerships with several objectives.

WORKPLAN TEMPLATE

Objective	Activity	By when	By whom	Status
To deliver a tailored program to adult learners currently not attending a Learn Local organisation	Develop Terms of Reference		Steering or advisory committee	Complete
	Develop a Memorandum of Understanding		Steering or advisory committee	In progress
	Develop an outcomes measurement framework		Steering or advisory committee	Delayed
	Develop a risk mitigation strategy		Steering or advisory committee	Not commenced
	Develop Position Description for skills needed to engage learners	Within one month	Manager at organisation x	Not commenced
	Recruit outreach worker	Within two months	Manager at organisation x	Not commenced
	Develop program content	Within two months	Program coordinator at organisation x	Not commenced
	Develop marketing strategy	Within four months	Outreach worker/manager	Not commenced
	Distribute marketing information	Within five months	Manager at organisation x	Not commenced
	Commence delivering program	Within six months	Program coordinator at organisation x	Not commenced

See section 3.4

7.8 Partnership logic

Name of Partnership: Partnership XXX

Context: A brief statement that explains the purpose of the partnership.

INPUTS	ACTIVITIES	OUTPUTS	SHORT TERM OUTCOMES	MEDIUM TERM OUTCOMES	LONG TERM OUTCOMES
XXX Staff, consultants $ XXX – XXX office space XXX research or knowledge that led to the development of the partnership XXX networks and relationships XXX Skills and training	Recruitment of partner organisations and staff Creation of a partnership governance model Development of a work plan Development of a MOU Risk assessment Development of an outcomes framework Work specific to the partnership, e.g. marketing & communications strategies, streamlining or enrollment processes etc.	A partnership steering committee/ working group/governance group A work plan A MOU A risk assessment framework An outcomes measurement framework or partnership logic Outputs specific to the partnership, e.g.: Number of staff working in the partnership etc.	Clear and regular communication occurs between partners Improved cooperation and collaboration between partners Partner organisations value the partnership Increased awareness in the community about education programs Increased number of enrollments in education programs Increased number of referrals from partner organisations Clients experience more streamlined enrollment and referral across partner organisations	Partners communicate openly and transparently The partnership is resilient Wider segments of the community participate in education programs Clients have better access to training and education that is right for them Clients are better linked in to the supports they require Clients receive holistic support across partner organisations	Strong relationships, underpinned by trust, respect and openness are embedded into the culture of partner organisations The community is more engaged in education, leading to improved employment and further training outcomes Improved mental health outcomes for community members

ASSUMTPIONS:

The partnership has been adequately resourced	The partnership will benefit all organisations involved	Segments of the community do not have sufficient access to education and training options	Streamlining application, enrollment and referral processes and procedures is an effective way to provide holistic services clients

See section 4.1.1

RISK REGISTER

Risks at partnership formation

Identified risk	Likelihood	Impact	Mitigation strategy	Date last reviewed
Partners are too busy to commit to the work required to implement the partnership			A working group/committee has been established to oversee the implementation of the partnership (for more information, see section 3.1.1)	
A lack of ownership by staff members at the partner organisations over the partnership			Relevant staff have been consulted and have had the opportunity to contribute to the formation of the partnership from the initial stages of development (for more information, see section 2.3)	
A lack of trust between partners			An effective governance structure and formal and regular channels for communication have been developed to facilitate trust-building and mutual understanding of issues (for more information, see section 3.1 – 3.4 and section 6.3 – 6.5)	
Robust contracts not drawn up to underpin the partnership			MOU (or other relevant contract depending on the partnership model) that describes high-level processes, scope of the work, roles and responsibilities (for more information, see section 3.2 and 3.3)	
Other?				

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See section 4.2.1

RISK REGISTER

Operational risks

Identified risk	Likelihood	Impact	Mitigation strategy	Date last reviewed
Unclear intellectual property arrangements			Clear guidelines regarding the production, use and ownership of intellectual property are articulated in the MOU/partnership agreement	
The partnership has implications for compliance (e.g. VRQA and ASQA compliance and ACFE Board accreditation) and other existing contractual arrangements			Partners have agreed to contact relevant agencies regarding compliance and existing contractual arrangements and will communicate the outcome with partner organisations	
The partnership is not meeting its objectives			There is a framework in place to continually measure progress and outcomes with learnings incorporated into annual strategic planning (for more information, see section 4.1 and 6.6)	
Provider identity is compromised by the partnership			The partnership is incorporated as an individual entity, separate to the partner organisations Marketing and social media policies outline requirements for using partner logos and other intellectual property as articulated in the MOU/partnership agreement (for more information, see section 3.5)	
A partner does not meet service delivery targets in a satisfactory or timely way			Encourage joint ownership of problems and solutions between partners Dispute resolution processes are in place and articulated in the MOU/partnership agreement (for more information, see section 4.3.2)	
Other?				

See section 4.2.1

RISK REGISTER

Ongoing risks to the partnership

Identified risk	Likelihood	Impact	Mitigation strategy	Date last reviewed
Change of key staff at partner organisations, which negatively affects the dynamics of the partnership			Induction plan for new members is in place (for more information, see section 4.3.1)	
A dispute occurs between partners			Dispute resolution process in place and is articulated in the MOU/partnership agreement (for more information, see section 4.3.2)	
It has been decided that a partner will exit the partnership			Exit strategy process in place and articulated in the MOU/partnership agreement (for more information, see section 5.1)	
Ongoing partnership risks are not being assessed			The risk register is listed as a standing agenda item at X number of meetings per year	
Changes in government policy			Test the policy objectives with the purpose and goals of the partnership, and allow for flexibility to incorporate these changes into the partnership. Annual planning days can facilitate this (for more information, see section 6.6)	
Managing change			The partnership conducts annual planning days (for more information, see section 6.6) during which any changes to the partnership are agreed upon and documented.	
Other?				

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See section 4.2.1