Building Strategic Partnerships to Foster Inclusion

October 17, 2008
Alexandria, VA
Background

Corporation for National and Community Service

Created in 1993, the Corporation for National and Community Service manages more than 1.5 million Americans annually in improving communities through service. The Corporation supports service at national, state, and local levels through:

• AmeriCorps, whose members serve with local and national organizations to meet community needs while earning education awards to help finance college or training;

• Learn and Serve America, which helps link community service and learning objectives for youth from kindergarten through college as well as youth in community-based organizations; and the

• Senior Corps, the network of programs that helps Americans age 55 and older use their skills and experience in service opportunities that address the needs of their communities. Senior Corps includes RSVP, Foster Grandparent Program, and Senior Companion Program.

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Founded in 1988, Campaign Consultation, Inc. works with individuals and organizations – at the local, state, national, and international levels – to advance community development, fund raising, corporate citizenship, diversity, issue advocacy, media & marketing, public policy, and organizational & business development campaigns.

Campaign Consultation, Inc. has extensive experience in helping people acquire the confidence, skills, and resources to design and advance “out of the box” strategies for goal achievement.

Since 1998, Campaign Consultation, Inc. continues to serve as the training/technical assistance provider for all areas related to resource gathering for the Corporation for National and Community Service. Campaign Consultation is currently providing technical assistance for the Resource and Fund Development Initiative as well as the Specific Learning Communities Initiative.

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Building Strategic Partnerships to Foster Inclusion

Collaboration among the service, volunteer, and disability communities offers promising ways to create comprehensive plans to actively engage members and volunteers with disabilities. Yet too often, parties don’t take the time to get to know each other nor agree on common goals. Without this critical step in the process, collaboration efforts can be difficult. This session will describe concrete elements and processes necessary for productive partnerships that enhance inclusion within your program and statewide.

Objectives

Participants will be able to:

- Identify opportunities for collaboration that support the inclusion of People with disabilities in national and community service projects and programs.
- Describe the benefits and challenges of building specific strategic partnerships between CNCS projects and disability-focused organizations.
- Develop an action strategy to engage in specific partnership building efforts.
# Building Strategic Partnerships to Foster Inclusion

## Agenda

<table>
<thead>
<tr>
<th>Overview</th>
<th>30 minutes</th>
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<tr>
<td><strong>Mini-teach and Group Discussion</strong></td>
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<tr>
<td>Characteristics of Partner Development in Economically Depressed Communities</td>
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<td>Types of Partnerships</td>
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<td>Rationale for Collaboration</td>
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<td>Seven Keys to Successful Collaborations</td>
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<td>Stages of Partnership Development</td>
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<tr>
<td>Building Strategic Partnerships</td>
<td>30 minutes</td>
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<td><strong>Small Group Exercises</strong></td>
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<td>Why Be Strategic?</td>
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<td>Questions to Consider for Strategic Partners</td>
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<td>What You Bring to the Table</td>
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<tr>
<td>Identifying Strategic Partners</td>
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<tr>
<td>Opportunities and Challenges of Partnering</td>
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<tr>
<td>Concrete Strategies</td>
<td>20 minutes</td>
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<tr>
<td><strong>Project Action Planning</strong></td>
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<tr>
<td>Reflection and Learning Reinforcement</td>
<td>10 minutes</td>
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</table>
Trainer Background Statements

Susan Hailman
Knowledge Transfer & Utilization Director
Campaign Consultation, Inc.

Susan Hailman is also Project Director for the Resource and Fund Development and Specific Learning Communities Initiatives for the Corporation for National Service. She has been involved in the development and evolution of the ASK to Sustain Learning Experience, Resources Now! National Institute and has developed the distance coaching format offered to national service programs and projects.

She has developed and delivered training and technical assistance for the Center for Substance Abuse Treatment to build its grantees’ capacity to advocate and sustain their activities. Prior to joining the Campaign Consultation team, Ms. Hailman served as the Director of Training for the Enterprise Foundation. She managed a national training and technical assistance project providing services to community development and finance professionals in 123 cities throughout the country.

Before moving to the private foundation arena, Ms. Hailman served as Project Officer / Public Health Advisor for the Center for Substance Abuse Prevention. She oversaw federal alcohol / drug prevention and community partnership training contracts valued at more than nine million dollars annually. Her past experiences related to assessment, marketing, and partnership-building provide Ms. Hailman with a unique understanding of sustainability from both a government and private funding perspective.
Tracy Sofirenko
Technology Project Manager
Corporation for National & Community Service

Tracy Sofirenko is a Technology Project Manager for the Corporation for National & Community Service. He is responsible for managing numerous technology implementation projects including web based systems for volunteers, grantees and Corporation staff. He currently serves as the technical project manager for the My AmeriCorps Portal project.

Additionally, Mr. Sofirenko has conducted outreach activities to promote national service to disability organizations, Corporation grantees, and individuals with disabilities across the country. He is a frequent speaker on National Service topics to disability organizations and vocational rehabilitation programs.

Mr. Sofirenko is a member of the Board of Directors and Chair of the Board’s Outreach Committee for the Washington DC unit of Reading for the Blind and Dyslexic. Reading for the Blind and Dyslexic (RFB&D) is the nation's educational library for those with print disabilities. RFB&D mobilized more than 7,000 volunteers to record text books and other academic materials for students in primary, secondary, and post secondary educational settings.

Mr. Sofirenko is President of the Arlington/ Alexandria/Falls Church chapter of the National Federation of the Blind. The National Federation of the Blind (NFB) is the largest membership organization of the blind in America. This chapter has approximately 60 members and is the largest local chapter in Virginia.
Characteristics of Partner Development in Economically Oppressed Communities

How do these characteristics apply to the community your project serves? How do these characteristics apply to persons with disabilities and the organizations that serve them? Which of these strikes you as meaningful context for consideration and how would this impact how you approach a potential partner organization?

- Oppression as a Thread of Connection
- High Level of Need for Resources, Support, and Feeling of Community
- Varied Sense of Community Dependant Upon Level of Disenfranchisement
- Individuals with Wide Ranging Practical Skills
- Many have Experienced Influx and Loss of Capital and Resources
  - Limited Employment Opportunities
  - Fewer Living Wage Jobs
- Limited Resources and Infrastructure
  - Transportation
  - Medical Infrastructure
  - Educational Options
  - Human Services
- Informal and Alternative Communication Networks
## Types of Partnerships

*Partnerships can happen at several levels.*

<table>
<thead>
<tr>
<th><strong>Communication</strong></th>
<th>Activity that has as its purpose sharing of information and non-material resources.</th>
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<tbody>
<tr>
<td><strong>Coordination</strong></td>
<td>Activity between two or more organizations that has as its purpose prevention of duplication of efforts and assurance of provision of service.</td>
</tr>
<tr>
<td><strong>Cooperation</strong></td>
<td>Activity between two agencies or sectors that aims at some integration of operations, while not sacrificing the autonomy of either party.</td>
</tr>
<tr>
<td><strong>Collaboration</strong></td>
<td>A mutually beneficial and well-defined relationship that involves people from different agencies or sectors of the community joining together to achieve a common goal. Usually, that goal could not be achieved as efficiently (or at all) by any individual organization. The result is a highly shared endeavor in which members eventually commit themselves as much to the common goal as to the interests of their own organizations.</td>
</tr>
</tbody>
</table>
Variables that Change with Level of Partnership

<table>
<thead>
<tr>
<th>Communication</th>
<th>Coordination</th>
<th>Cooperation</th>
<th>Collaboration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low commitment………………………………… …………………….High commitment</td>
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<td></td>
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<tr>
<td>Low formality………………………………… …………………….High formality</td>
<td></td>
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<tr>
<td>Low personal contact…………………………… ………………………….High personal contact</td>
<td></td>
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<td></td>
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<tr>
<td>High autonomy………………………………… ……………………..Low autonomy</td>
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Examples of Levels of Partnership

At the **communication** level, we might share information with other groups regularly to let them know what we’re doing and find out what they’re doing.

At the **coordination** level, we might create a joint calendar of activities so that we can coordinate events and avoid unnecessary conflict.

At the **cooperation** level, we might meet regularly to define the needs of children in our community and agree that the schools will be provided with tutors from agency A, and parent volunteers from agency B, and school nurses from agency C.

When we **collaborate**, we create a new service like a 5-day-per-week after school program with services, staff and volunteers from all of our agencies.
Rationale for Collaboration

- Coordinated planning
- Cost-effectiveness
- Expands reach of programs
- Builds and restores fabric of community
- Promotes ownership and institutionalization
  - Integrates goals
  - Increases support over the long haul with local resources
  - Evolves structures and delivery mechanisms
- Develops spokespersons for the effort
- Increases partnership opportunities
- Reduces “Lone Ranger” initiatives
- Expands the community’s ability to respond comprehensively to community needs
Seven Keys to Successful Collaborations

• Trust!

• Shared Vision

• Skilled Leadership

• Process Orientation

• Cultural Diversity

• Membership-Driven Agenda

• Multiple Sectors

• Accountability
Stages of Partnership Development

There are many useful models through which to view strategic partnerships. The key to sustaining collaborative efforts is to understand that the process of partner development takes time, energy, clarity, and attention. All partners need to feel as if they are both giving and receiving in the partnership, and all must be willing to hang in through the times of tension and ambiguity to get the fruit at the end of the process.

Tuckman Model of Group Development:

Bruce Tuckman’s model explains that as a group develops maturity and ability, relationships are established, and the style of leading, partnering, and interacting must adapt with the evolution of the partnership and individuals within. (B.W. Tuckman, 1965). Partnerships develop in the same way:

The partnership progression is:

- **Forming**
- **Storming**
- **Norming**
- **Performing**
Stages of Partnership Development
(continued)

Forming – stage 1

High dependence on the convener for guidance and direction. Little agreement on team aims other than received from convener. Individual roles and responsibilities are unclear. Conveners must be prepared to answer lots of questions about the partnership’s purpose, objectives, and relationships. Processes are often ignored. Members test tolerance of system and participating organizations. A convener must be willing to both hold out images of success, while leaving room for others to shape that image.

Storming – stage 2

Decisions don’t come easily within group. Partnership members vie for position as they attempt to establish themselves in relation to other team members and the convener, who might receive challenges from team members. Clarity of purpose increases but plenty of uncertainties persist. Cliques and factions form and there may be power struggles. The team needs to be focused on its goals to avoid becoming distracted by relationships and emotional issues. Compromises may be required to enable progress. The convener role evolves to initiate coaching relationships.
Stages of Partnership Development
(continued)

Norming – stage 3

Agreement and consensus begins to form among partnership members who respond well to facilitative attempts. Roles and responsibilities are generally clear and accepted. Big decisions are made by group agreement. Smaller decisions may be delegated to individuals or small teams within group. Commitment and unity is strong. Securing the structure of relationships and work frees energy for more positive activities and emotions to emerge. The team discusses and develops its processes and working style. There is general respect for shared leadership by the team. The role of the convener becomes facilitative and empowering.

Performing – stage 4

The partnership is more strategically aware; the team knows clearly what it is doing and why. The team has a shared vision and is able to stand on its own feet with little need for an assumed role of leader. There is a focus on over-achieving goals, and the team makes most of the decisions using criteria agreed amongst the membership. The team has a high degree of autonomy. Disagreements may occur but now they are resolved within the team positively and necessary changes to processes and structure are made by the team. The team is able to work towards achieving the goal, and attend to relationship, style, and process issues along the way. Team members look after each other. The team responds effectively to delegated tasks/projects.
## Building Strategic Partnerships

*Adapted from Team Technologies*

### Characteristics of Each Stage

<table>
<thead>
<tr>
<th></th>
<th>Forming</th>
<th>Storming</th>
<th>Norming</th>
<th>Performing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Focus</strong></td>
<td>Own Needs</td>
<td>Others Issues</td>
<td>Rules &amp; Processes</td>
<td>Collective Results</td>
</tr>
<tr>
<td><strong>Trust</strong></td>
<td>Assess partners</td>
<td>Trust Authority</td>
<td>Trust the Processes</td>
<td>Trust the People</td>
</tr>
<tr>
<td><strong>Relationships</strong></td>
<td>Surface/Collegial</td>
<td>Positioning/Conflict</td>
<td>Cautious</td>
<td>Productive</td>
</tr>
<tr>
<td><strong>Feedback</strong></td>
<td>Covert</td>
<td>Overt</td>
<td>Constructive</td>
<td>Fluid/Reciprocal</td>
</tr>
<tr>
<td><strong>Decision making</strong></td>
<td>Fragmented</td>
<td>Tense</td>
<td>Careful</td>
<td>Natural</td>
</tr>
<tr>
<td><strong>Role understanding</strong></td>
<td>Unclear</td>
<td>Ambiguous</td>
<td>Clear</td>
<td>Intuitive</td>
</tr>
<tr>
<td><strong>Products</strong></td>
<td>Individual</td>
<td>Incomplete</td>
<td>Risk Averse</td>
<td>Innovative</td>
</tr>
<tr>
<td><strong>Knowledge Transfer</strong></td>
<td>Strategic</td>
<td>Clipped</td>
<td>By the Book</td>
<td>Free Flowing</td>
</tr>
<tr>
<td><strong>Performance</strong></td>
<td>Individual Effort</td>
<td>Low Output</td>
<td>Consistent</td>
<td>High Quality Results</td>
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In your experience, where have you found the greatest challenges in moving partnerships forward successfully?

What might you do as a collaborative partner to support movement to the next stage?
Why be Strategic?

STRATEGY – a carefully devised plan of action to achieve a goal or the art of developing or carrying out such a plan.

A strategy:

- defines the outcome or objective an organization is attempting to achieve
- produces the implementation steps used to achieve the objectives
- determines the range of activities that will be used to meet organizational goals

The formulation of strategy requires a fit among:

- The opportunities in the external environment
- The strengths and weaknesses of the organization
- The personal values of the key implementers
- The broader societal expectations of the organization

To begin thinking strategically about your current relationships and partnership opportunities, consider the questions on the following page...
Questions to Consider for Strategic Partners

- How does the potential partner’s mission align with ours?

- What is the potential partner’s role in the community? Whom does it serve?

- How do the programming, services, and products of our two organizations complement one another?

- What are the resources (people, money, expertise, relationships, facilities) and the gaps that each organization brings to the table?

- What new opportunities become possible by combining forces?

- What are any potential risks or conflicts in partnering with the organization?
What You Bring to the Table

Example:

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>CHALLENGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong leadership</td>
<td>Small staff</td>
</tr>
<tr>
<td>Monthly newsletter</td>
<td>Lack of funding</td>
</tr>
<tr>
<td>Positive image</td>
<td>Lack of volunteers</td>
</tr>
</tbody>
</table>

What do you bring to the table?

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>CHALLENGES</th>
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## Identifying Strategic Partners

*Write down a goal or activity that you want to work with other organizations to achieve. What could be the contributions of each partner organization?*

<table>
<thead>
<tr>
<th>Organization</th>
<th>Contributions and Other Benefits</th>
<th>Opportunities and Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Civic Organization (Rotary International)</td>
<td>Volunteers, Donations, Business Acumen, Sponsorship</td>
<td>Reach a broad segment of the business population. Tend to have pet projects, might be difficult to engage in new effort.</td>
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</table>
Opportunities and Challenges of Partnering

Opportunities of Partnering...
*What can this partnership help you do that you can’t do alone?*

Challenges for Partnering...
*What will you need to do or not do to nurture this partnership that you do not do now?*
## Concrete Strategies

*Identify concrete actions you could take within the next month that would produce the greatest movement toward increased strategic partnerships.*

**Overall Vision/Goal for the partnership** (state concrete, measurable results):

**Action Timeline** (by when would you like to have reached your goal):

<table>
<thead>
<tr>
<th>Partnership Action Item</th>
<th>Goal of Action</th>
<th>Action steps or information needed to initiate action</th>
<th>Stakeholders to be engaged</th>
<th>By when?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Initiate collaboration with vocational rehabilitation agency explore potential partnership</td>
<td>Example: Explore what they have to offer partnership and what we would provide</td>
<td>Example: Set brainstorming meeting with key stakeholders to identify potential strengths and challenges</td>
<td>Example: Our agency ED, recruitment manager, Bd member with links to Voc Rehab agency</td>
<td></td>
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</tbody>
</table>
Closing Session

- Next Steps
- Announcements
- Evaluation
- Thank You

“One of the Top 100 Inner City Companies in the U.S.” – Inc. Magazine/ICIC”