

**BUILDING EFFECTIVE RELATIONSHIPS**

**IDENTIFYING AND SELECTING THE RIGHT CORE PARTNERS**

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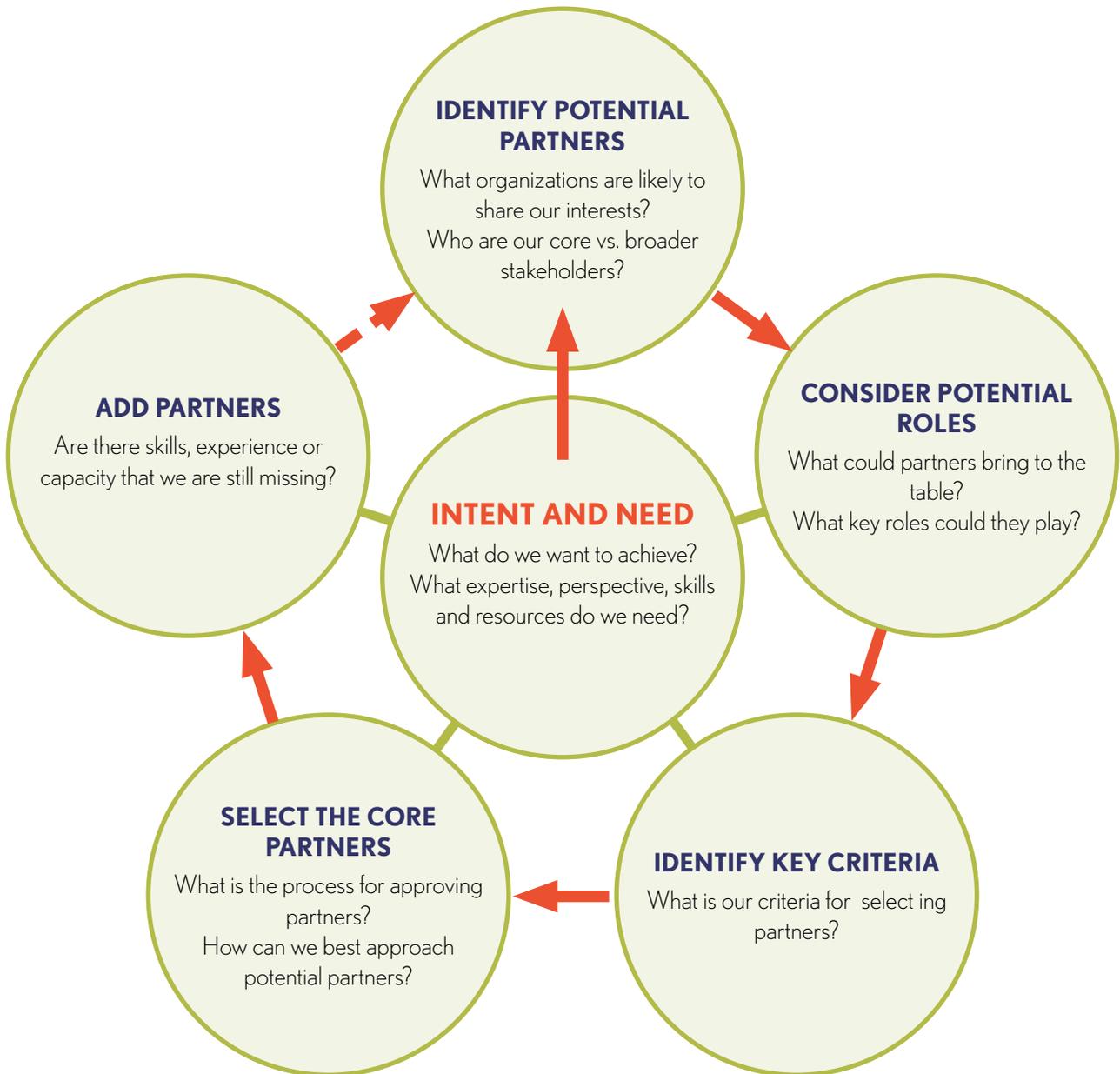
**PURPOSE**

Establishing a committed group of core, strategic partners who participate in the collaboration is critical. Whether the collaboration is just forming or is evolving, you need to work through a process to identify and select the right partners.

**HOW TO USE THE TOOL**

- Follow the steps for selecting the right partners. Be sure to continuously come back to your core purpose and the expertise, perspectives, skills and resources you'll need to achieve it

**PROCESS TO MAP AND REFLECT ON INVESTMENTS IN COLLABORATION**



## 1. DEFINE THE INTENT AND NEED

Start with a picture of what is to be achieved by the collaboration. This will continue to evolve as more partners become involved. Think about the needs within your organization and in the community. Consider what outcomes could be achieved by working with others. Don't set these in stone early in the formation of the collaboration. It will need to be honed by partners as they join.

Also, broadly identify the expertise, perspectives, skills and resources that might be required to achieve the intent. For example:

Expertise/Perspective	Skills of	Resources
<ul style="list-style-type: none"> <li>• Understanding of community/ population, issues and/or opportunities</li> <li>• Collaboration experience</li> <li>• Credibility and connections with key stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Convening and relationship management</li> <li>• Team building</li> <li>• Facilitation and mediation</li> <li>• Financial and human resource management</li> <li>• Fundraising and grant writing</li> <li>• Project planning and management</li> <li>• Quality and risk management</li> <li>• Outreach, communication and marketing</li> <li>• Research and evaluation</li> <li>• Property management</li> </ul>	<ul style="list-style-type: none"> <li>• Staff and volunteers</li> <li>• Short or long term funding</li> <li>• Access to space</li> <li>• Equipment and/or technology (e.g. communication tools)</li> <li>• Information management systems/ facilities (e.g. databases)</li> <li>• Stakeholder research</li> </ul>

Begin to fill in the **Core Partner Composition Analysis Chart** found in Appendix A.

## 2. IDENTIFY POTENTIAL PARTNERS AND THEIR ROLES

Brainstorm answers to the process questions with the leadership within your organization and/or a few other people who've indicated an interest in working together. Do research to identify other organizations that share your mission or goals, work in complementary sectors and/or could want the same end outcomes. Don't just think of allies, also think about competitors.

Be sure to distinguish between those organizations or people who could be core partners from those who are broader stakeholders. Think about it in the following way:



Now think about the roles each partner could play and align those with what needs to be fulfilled to achieve the outcomes. Again, the roles will likely be revised as the collaboration forms and you hone your goals and outcomes. You may need to hold a meeting with potential collaborators to uncover the specific capacity and skills they bring to the table. Continue to build the **Core Partner Composition Analysis Chart**.

### 3. IDENTIFY KEY CRITERIA AND SELECT THE CORE PARTNERS

Once you've assessed your needs and identified potential partners, you can use agreed-upon criteria to help select the right partners. Determine if all the criteria need to be met or if some are more important than others. Review the list of possible partners and how well they could meet the identified criteria.

The following are examples of criteria:

- Have a significant stake in and/or commitment to the collaborative outcomes.
- Can contribute the skills, capacity and resources required to fulfill the outcomes.
- Are willing to contribute sufficient time, resources and skills
- Bring credibility because of their demonstrated track record and reputation.
- Share fundamental values, beliefs or assumptions
- Have a history of collaborating effectively

Continue to build the **Core Partner Composition Analysis Chart**.

Remember to be intentional in your process for selecting partners or you'll risk inviting the wrong partners simply because 'someone knows someone'. The process can be very simple or more involved depending upon the nature of your collaboration.

### 4. ADD PARTNERS

As your collaboration evolves and matures, you may find that the intent changes, partners need to be replaced and/or there are capacity gaps that must be filled. Follow the same process as you did at the formation of the collaboration so you continue to engage the right partners. To identify gaps that need to be filled, revise your **Core Partner Composition Analysis Chart**.

# APPENDIX A: CORE PARTNER COMPOSITION ANALYSIS CHART

1. This worksheet can be used to align requirements with characteristics of potential partners.

<p><b>Our intent and outcomes are:</b></p>	
<p><b>List what is required to fulfill the intent and outcomes</b></p>	<p><b>Identify those brought by potential partners (including those that align with requirements as well as others)</b></p>
<p><b>Expertise/perspective:</b></p>	
<p><b>Skills:</b></p>	
<p><b>Resources:</b></p>	

2. Use this worksheet to screen potential partners. In the orange section identify each of the key criteria that need to be met by potential partners. Down the blue column, list the names of potential partners. Under each criteria, put a checkmark if the potential partner can meet the criteria. This will give you a picture of any gaps.

Identify Criteria					
List Potential Partners					

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