Ideas for a Change

Part 7a - December 2000

Beginning to work together

OLIVE PUBLICATIONS

This publication is part of the Ideas for a Change series developed between 1997 and 2002. The following titles have been published in this series so far:

Overview: Ways of Seeing Organisations

Part 1: Strategic Processes

Part 2: Organisation Diagnosis

Part 3: Approaching Change

Part 4: Working with Resistance

Part 5: Developing Policy

Part 6: Capacity Development

Parts 7a and 7b: Developmental Partnerships

Part 8: Financing your Organisation

Olive
ORGANISATION
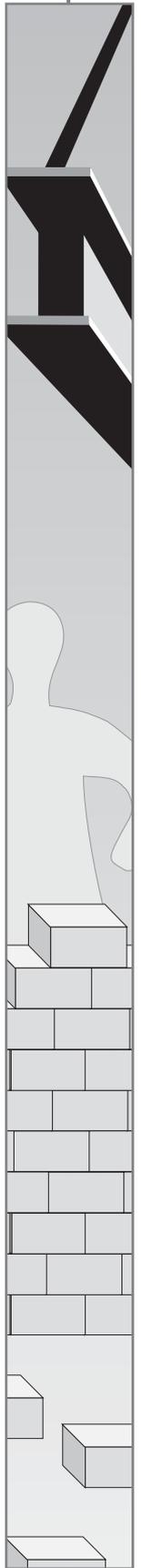DEVELOPMENT
& TRAINING

Acknowledgements:

Ideas for a Change

Part 7a

Developmental Partnerships:

Beginning to work together

"Partnership — the tendency to associate, establish
links, live inside one another, and co-operate — is
one of the hallmarks of life."
Fritjof Capra

Contents

What is "Ideas for a Change"?

This publication is a response to seven years of Olive's (organisation development and training) experience of working with organisations in the not-for-profit sector. These organisations have sought to survive in a dramatically changing environment, to do useful and important work, to strengthen and develop their people and their organisations and, ultimately, to be effective and sustainable.

The future of any organisation rests on the will, energy, experience and knowledge of its staff, its leaders and its supporters. People from outside of the organisation can only provide particular forms of support – be it a certain level of expertise, insight, or a knowledge base not present in the organisation at the time. Further, outsiders can provide developmental support to an organisation over a long period of time as it plans and manages change. While this is invaluable, it can be costly.

We have found that people in not-for-profit organisations are often exceptional in their knowledge of their sector and of the players in that sector. However, it should not be assumed that the same people have a strong grasp on how organisations grow, develop and change. After all, why should an engineer know how to run a company or a nurse a hospital? People's professional knowledge, whether in education, health, or human rights, does not necessarily include organisational knowledge and the capabilities needed for organisational management and change.

We know all too well that organisations are faced with immense challenges – political, economic, and cultural; shifts in donor policy; imperatives for affirmative action; measurable delivery; and staff development. We also know that organisations are cash-strapped and cannot easily afford external organisation development (OD) processes. Again, there is the reality that leaders in organisations, while strong on sectoral knowledge, are not necessarily strong on organisational issues. Consequently, a need for a publication that provides some "literacy" in OD and change has emerged.

The *Ideas for a Change* series is, of course, neither the beginning, nor the end, of what there is to say about organisational processes. Libraries and one's own experience (and reflection on that experience) are the key resources for this. Rather, this series seeks to explore what might be done to tackle various organisational issues and suggests how one might go about doing this. Therefore, we offer a selection of questions, approaches and techniques that can be drawn upon for specific processes. There is no one way to work with organisations. There are no formulae.

So far...

Overview: Ways of Seeing Organisations (June 1998) explores, in broad brush strokes, some of the different views of the world (reality) as they have developed over time, how organisations have been viewed, and how they might be seen differently. The

publication focuses on the shift from a mechanistic way of seeing organisations, to considering the systems perspective of organisations.

Part 1: Strategic Processes (July 1997, 2nd edition – June 1999) focuses on strategic work as an important aspect of organisational practice. The publication highlights the need for strategic thinking to be built into the life of organisations. It further suggests that, once leadership has grasped the concepts, processes and tools for strategic work, this becomes a continuous, conscious process.

Part 2: Organisation Diagnosis (December 1997) aims to provide thoughts, ideas, questions and approaches to "reading" an organisation. It focuses on organisation diagnosis as an important step in finding out where an organisation is and where it has come from, in order to explore where it might go in the future.

Part 3: Approaching Change (December 1998) is an introduction to the concept of change and to a number of different perspectives on change. In a sense, this publication considers change "from the outside". It looks at theories of change, at how we at Olive approach it, and at how others have done so. The work of various authors, the assumptions underlying different approaches to change, and the forms of "intervening" in organisations, are also discussed.

Part 4: Working with Resistance (June 1999) explores, in the context of organisations, how people respond to change. The publication briefly sets out the context of change, considers how it is seen from different perspectives, and how different cultures are formed from these perspectives. It then focuses on the concept of "resistance", looks at how it is presented by different people, and offers some ideas on how leaders might approach and work with it.

Part 5: Developing Policy (December 1999) explores the idea of policy, how it is different from principles, procedure and practice, and how it relates to these. It also asks "why policy?" and "what is its value?". This publication offers some steps for preparing to develop policy. It then takes the reader, step by step, through the process of actually developing it. Issues around implementing and monitoring organisational policy are also briefly considered.

Part 6: Capacity Development (June 2000) explores the ideas of capacity building and capacity development and works with the questions: What is capacity? Where does it come from? What attitudes or perceptions constrain its development?

The publication then sets out some conditions for more effective capacity building and development in organisations. It offers a framework for designing a capacity development effort, and suggests steps on how to design a capacity development plan. An exercise is also included.

What is Part 7a all about?

The word "partnership" is rapidly becoming one of the most used phrases in the lexicon of development workers, business people and all tiers of government in South Africa today. We are all desperately striving to work in partnership, to establish partnerships, and, in some instances, to flee from dysfunctional partnerships.

Ideas for a Change Part 7a emerges from an effort to come to grips with the notion of "partnership": its meaning; the strengths and considerations involved in working in this form; the individual and organisational needs and resources upon which partnership draws; and emergent partnership "best practice". In 2000, we[1] embarked on a unique partnership of our own to develop and deliver a learning programme for partnership development. This publication draws on the experience of this two-module learning programme and the insights of both the facilitation and programme design team and the participants. The journey of these workshops has deepened our understanding of potential ways to improve our partnerships, to find more meaning and carry less stress, and to continue working more collaboratively and interdependently or, in the words of one participant, to "inter-deepen-the-dance!".

In *Ideas for a Change Part 7a*, we begin to explore some of the practical and theoretical potentials, issues and concerns raised by working in partnership. We also suggest that partnerships give rise to new ways of working and ways of life for partners, both organisationally and individually. Developmental partnerships can allow deeper impact in communities (increased effectiveness), as well as present a number of benefits and outcomes to the organisations involved.

This publication answers some key questions:
- What are developmental partnerships?
- Why are they important and worthwhile?
- What do we need to know about ourselves before we enter into partnership with others?
- How do we know we have chosen "the right" partner/s?

It also offers some ideas and exercises which may be useful in entering into a developmental partnership, and working with the human-aspects of these relationships.

Ideas for a Change Part 7b focuses on issues around working in partnership with others and deals both with "people" and "product" related questions. It also considers the role of monitoring and evaluation and examines the ending/closing of a partnership.

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1. The partner organisations were Olive (KwaZulu Natal), Tlhavhama Training Initiative (Northern Province) and the Eastern Cape NGO Coalition.

Section I: Developmental Partnerships

What is a developmental partnership?

Simply put, a partnership entails the joint action of more than one party (joint engagement in which risks and profits are shared — *Concise Oxford Dictionary*). *Roget's Thesaurus* points out that partnership is also associated with collaboration, co-operation and concerted effort. At the centre of partnership is the notion of relationship.

This publication deals quite specifically with developmental partnerships. A **developmental partnership** is different from an ordinary joint venture. It is important to state up front that achieving outcomes and impact (e.g. the delivery of housing and infrastructure in a development arena in order to improve the lives of community members) remain the key reasons for partnering with other organisations. However, developmental partnerships are not exclusively focused on intended outcomes and impact. They also take into account the developmental implications of *how* the partners work with each other and with their target group — the process of the partnership (e.g. emphasising the need to consciously share learning). We refer to developmental partnerships as "2nd generation partnerships", as they move beyond the primary focus on outcomes and physical resources that characterised the "1st generation partnerships" of the past decade. Developmental partnerships emerge from the realisation that people and organisations can (and should) learn, develop and change, while delivering against their goals.

The quality and effectiveness of a partnership is highly dependent on the quality of relationships between the people involved. A central tenet of a developmental partnership is that individuals play a heightened role in forming, developing and maintaining the partnership. We see these partnerships as catalysed by *people*. The partnership form brings people, organisations and various role players together to work toward achieving a common purpose.

This brings us to the second distinguishing factor of developmental partnerships: **a shared formulation of purpose** — that which we want to achieve. Developmental partnerships focus on purpose which is rooted in jointly understood problems and opportunities. The partners value each other's views and insights, and focus on what *can* be built through jointly identifying, sharing and conceptualising the components which come together to form the purpose, strategy and actions of the partnership. At the level of purpose we are concerned with why the partnership exists and what it seeks to achieve (i.e. its identity and vision). At the level of strategy, we are concerned with how we will achieve our purpose. At the level of actions, the focus is on tasks, and who will complete them, by when, in what quantity and to what quality.

Some features of a developmental partnership include:
- the notion that change and transformation are implicit and desirable;
- shared visions, values, and purpose;
- striving for a high degree of trust, mutual accountability and responsibility;
- interdependence in relationships which gives rise to higher level functions than "getting the work done";
- tangible and intangible benefits to both beneficiaries and partners;
- the potential to overcome fragmentation and pain; and
- a redistributive agenda.

Thirdly, developmental partnerships must be based on **shared values in practice**. For relationships to have meaning and value, shared purpose alone is insufficient. While purpose provides an initial attraction (the spark which ignites the partnership), values and practice are the glue which will hold the relationships together in times of stress and victory. Working principles, based on values and practice, guide and support relationships, actions and decision making, and play an important role in determining what impact the partnership can achieve. In South Africa, for example, one of the implicit values of developmental partnerships is a commitment to transformation and redistribution. Translating this into practice could mean the building and sharing of capacity among the members of the partnership, and seeing such activity as an important outcome of working together.

Fourthly, developmental partnerships, through an on-going cycle of renewal, learning and exchange, **evolve into interdependent**, **mature relationships**. Ideally, in addition to achieving external development goals, the partnership, its member organisations and the individuals involved, are developed in the process of building, sharing and exchanging resources, ideas, capacities, power and learning. For this to happen, each partner must be equally valued.

At the same time, the different strengths and needs of the various partners are recognised. This enables an equitable distribution of resources and benefits. To achieve this, partnerships require a high degree of trust and honesty. It is imperative for individuals, partner organisations, and the partnership as a whole, to openly recognise capacity, contribution, benefits and limitations at all levels, and to actively pursue human and organisational development within the partnership itself. **A developmental partnership exists, therefore, to address not only the needs and opportunities of beneficiary groups, but also the needs and opportunities of its members**.

Like all other relationships, good partnerships take time to develop. They also go through a number of phases. Throughout the life of the partnership, change and growth happens to the people involved, to their organisations, to the partnership itself and to its target group.

This means that the contracts that formally bind organisations together (and those contracts or subcontracts a working partnership wins and delivers against) are the *outputs*, not the *heart* of developmental partnership.

Participants on the course, from which much of the content of this publication is drawn, had the following to say about developmental partnerships:

A development partnership works towards a vision of an improved society that we live and work in. A healthy developmental partnership acknowledges the inequalities that exist in it and seeks to close those gaps in a developmental way, by caring for each other. It builds and provides a safe space for sharing. Good communication lies at the heart of its success. A development partnership is organic in nature. (Matsimela Takalo, Leon Mdiya, Andra Hellberg-Phillips)

A partnership can be formal or informal, it is based on trust, commitment, a shared vision with shared risk and profits. Partnerships maximise available resources and provide opportunities for creative innovations and offer healing transformation to fragmentation and dysfunction. (Diana Hornby, Carol Liknaitzky, Ellina Thoka)

Developmental partnership is a process whereby various partners assume collective responsibility for bringing about sustainable social change through the sharing of resources, skills, knowledge and experience, with a commonly held vision and commitment, in a relationship of mutual trust, respect, responsibilities and accountabilities. (Lucky Malgas, Virginia Molose, Nana Ndlovu)

A partnership as a whole is greater than the sum of its parts.

Why partnership? Why now?

The notion of working in partnership is not new but it has certainly gained momentum and popularity in the last decade. Working "in partnership" has become a political and operational imperative, driven by a number of external factors. Some of these are:

▶ Globally, **the changing role of the State**, has influenced the rise of partnerships, especially those between governments, civil society organisations and the private sector. Increasingly, governments have moved from playing an interventionist role to attempting to work more strategically. A "strategic state" views its primary role as creating an enabling policy environment within a broad vision and direction. This is in direct contrast to the interpretation of the state as an interventionist entity (i.e. a state which not only co-ordinates services, but also takes direct responsibility for delivering those services).

The move to a strategic state can be dismissed as a neo-liberal agenda, enabling the state to abdicate its responsibility to directly provide services. However, this shift coincides with the trend to use more participatory approaches in development initiatives. The space provided by a strategic state, coupled with development approaches which encourage community members to more forcefully voice their opinions and needs, and more proactively engage in fulfilling their developmental rights, creates special conditions for partnerships between the State, communities and progressive civil society organisations engaged in participatory development.

In South Africa, this convergence has found most expression in the sphere of local government and is frequently couched in terms of "deepening democracy".

▶ Because the State has, frequently, let go of its direct service delivery function, but maintained its overall responsibility to ensure services to its citizens, there is a political imperative for partnerships which **enhance service delivery**, especially to difficult-to-reach (often rural) areas. Often, partnerships between government and other role players are developed in order to extend the reach of the state — either physically, or to enable rapid response or policy experiments through pilot projects.

Government's use of partnership arrangements with local NGOs and small businesses creates the potential not only for the "empowerment"of these entities, but for more effective service delivery to citizens. The assumption is that the closer a service provider is to the citizens, the more responsive the provider must be. In this way, government can be held
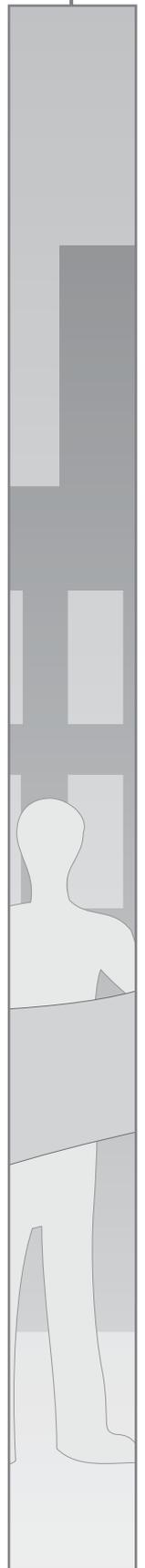
much more accountable to its populace through creatively selecting and using partners who are based in communities and are sensitive to community needs. The additional benefit is that more money is circulated in the local economy and less is spent on transport, subsistence, travel and other expenditure items which are necessary when accessing remote service providers. The end result should be more responsive, less expensive services for (especially rural) communities.

▶ All developmental activities are characterised by the need to **maximise the use of limited resources** (human and financial/material) and use limited resources more responsibly. Development programmes with endless resource streams are unheard of, and in a climate of budget cuts, new donor priorities (Eastern Europe, for example, rather than Africa), and a limited pool of human capital (people with the interest and skill to devote themselves to developmental activities), it is only prudent to find ways to make the best, most effective use of the resources at our disposal.

Working in partnership with others enables organisations to access scarce skills and material resources, while reducing the duplication of effort. Partnerships can also enable organisations to develop real expertise in specialised areas as they work in close collaboration with each other instead of trying to develop the capacity to answer all developmental needs in a given community/area.

▶ Collaborative working arrangements have the potential not only to use existing resources most effectively, but to also **build capacity** in partnering organisations. Working in developmental partnership creates the necessary synergy of purpose, values, skills and expertise to enable each respective organisation to both give to the relationship and take new capabilities from it.

Working together, we see (and try) new ways of engaging communities and each other. We are challenged to forge new theories and approaches to resolving development challenges. Working with other organisations provides us with fresh ideas and opportunities for skills development through creatively sharing the best of what each partner has to offer. Contacts are also exchanged, and the potential for each organisation to leave the partnership with enhanced skills, networks and reputations is created.

What forms can a partnership take?

Partnerships — like relationships of any kind — can take a number of forms. There is a tendency to call any and all relationships "partnerships". This has led to a fair amount of confusion and enabled "partnership" to become a catch-all phrase. Although this publication looks specifically at *developmental partnerships*, it is helpful to look at the different forms of relationships which are often called "partnerships".

We have used the following three criteria to differentiate between some broad forms of collaborative relationships between organisations (see diagram below):

- the degree of dependence/interdependence of the parties;
- the amount and quality of information and knowledge which is shared; and
- the influence each has on the direction the partnership takes.

PARTNERING

| SUB-CONTRACT | DIRECT FUNDING | JOINT VENTURE or DEVELOPMENTAL PARTNERSHIP | CONSORTIUM | NETWORK |

One party more dependent on the other.

Little shared control.

Collective interests.

Individual action.

High degree of mutualism and interdependence.
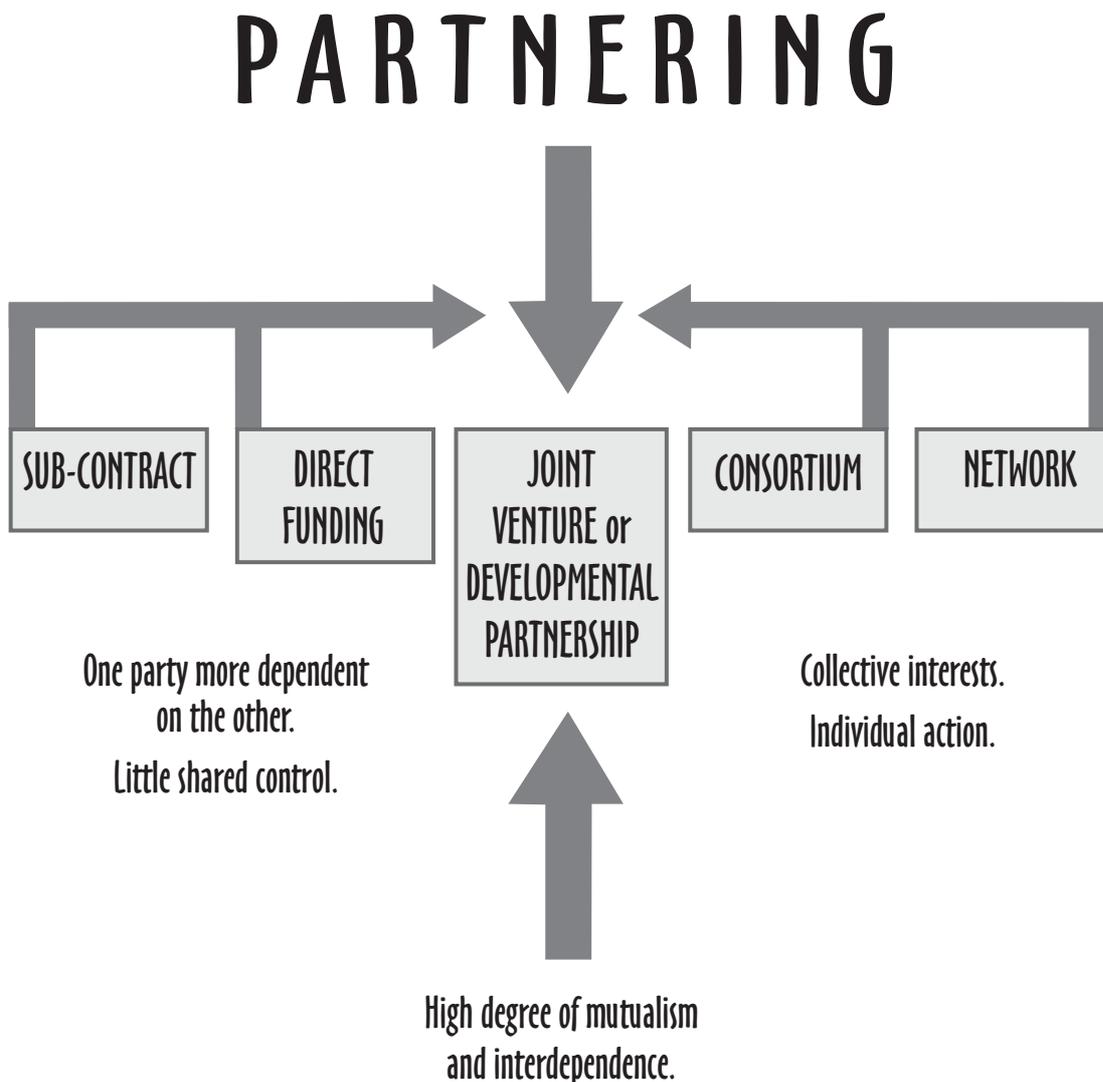
▶ **Sub-contract:**

Two organisations sign a contract for which the sub-contracting organisation pays for services provided by the sub-contracted organisation. The services provided help the sub-contracting organisation to meet its own objectives. As such, it is best described as a "fee-for-service" relationship. In this relationship, it is assumed that the sub-contracted organisation already possesses some of the necessary qualities and skills to carry out the task for which it has been sub-contracted.

▶ **Direct Funding:**

Grants are provided to local (or international) organisations so that they may design, implement, evaluate and manage their own projects. This differs from a sub-contract in the sense that the grantee has control over designing, implementing and managing its project, whereas in a sub-contract the relationship is essentially one of a fee for a specific, pre-determined service.

▶ **Joint Venture/Developmental Partnership:**

Two or more organisations come together to design, implement, monitor, evaluate and manage a project. Participating organisations pool their resources, and roles are determined by the strengths each organisation brings to the situation (this is explored more practically in Section 3).

▶ **Consortium:**

Consortia are usually issue-based groupings of three or more organisations which have come together to bring a value-added approach to programmes. Each organisation has a different role, based on what it can contribute to strengthening an assault on the problem. (In practice, we have noted that there is sometimes the danger of consortia forming without having identified a clear purpose or goal, simply because resources are available.)

▶ **Network:**

This is an informal affiliation of institutional and/or individual linkages designed to share information and issues pertinent to their collective interest.

(Both the framework and the descriptions above were drawn from Stuckey, J; Durr, B; Thomas, G. 2000. Partnership Conceptual Issues Paper. Unpublished first draft. Atlanta: CARE USA Partnership and Household Livelihood Security Unit.)

Developmental partnerships are those in which there is a high degree of mutuality and shared control. While working alone ensures organisational autonomy and individual control, working collaboratively increases the potential to access information and resources — and to make a greater, more sustainable impact on the lives of beneficiary communities.

Section 2: Conceptualising partnerships using four frameworks

In this section, we use four frameworks to conceptualise partnerships:

- Role players in partnerships
- The impact of partnerships on societal and organisational change
- The partnership system
- Levels of complexity

Role players in partnerships: a strategic positioning framework

Throughout the life of a partnership, it is important to bear in mind that there are three essential sites of learning and change:

- Me
- My organisation
- The partnership

Each of these sites constitute systems which interact with each other and with the environment. A core group of people representing each of the partner organisations needs to keep this framework in mind during the course of forming the relationship and implementing the work.

In order to work effectively in partnership it is necessary to position:

- "me" within my organisation and the partnership;
- "my organisation" within the partnership; and
- "the partnership" in the broader environment.

Such strategic positioning is a vital function of leadership in partnerships.

In addition to positive change for beneficiary communities, working in partnership enables growth and change in the individuals involved, the respective partner organisations and the process of "partnering" itself. It is necessary to recognise and balance individual, organisational and partnership learning, change and benefits, if relationships, interest and motivation are to be maintained. Being aware of the needs and frustrations of each entity helps to sensitise all concerned to the dynamic nature of the partnership, the shifts in power and need, and the ebb and flow of interest and ideas.

■ **People** need to position themselves both in the partnership and in their organisations, to effectively work with others, carry lessons to and from their organisations, and take advantage of new ideas, insights and opportunities.

■ **Organisations**, when preparing to go into partnership, need to strategically position themselves and be prepared to give and receive during the course of the relationship. The dynamic conditions and phases of a partnership's life may require organisations to assess their learning, their contribution, their benefits and their potential, and re-position themselves in relation to the other partners and the partnership as a whole.

■ The **partnership**, like an organisation, is an open and learning system. As time goes on, the partnership will learn and grow. It may take on (or shed) members. It needs to assess and reassess its position with regard to the needs of the beneficiaries, the partner organisations, the people involved and external environmental factors.

This image of the dynamic factors involved, can help us to understand not only the diverse and complex issues involved around partnering, but also our own fluctuating motivations, commitments and needs throughout the life of the relationship. To pretend that the partnership is a single, static entity, bound only by a contract, is not only delusional, but denies our organisations and ourselves some of the pleasure of working with others.

The impact of partnerships on societal and organisational change: an evaluative framework

In the South African context (as in many others) we work from the understanding that our society is characterised by a high degree of poverty and inequality. Thus, in addition to noting the different role players and layers in a partnership, and working with them strategically (see pages 15-16), it is necessary to locate partnerships in the context of organisational and societal change.

Thus, we might ask:
- What actually changes?
- How do we support positive change? and
- How will we know when change has happened?

Partnerships can reflect on three primary areas of change:
- Economic
- Political
- Social or developmental
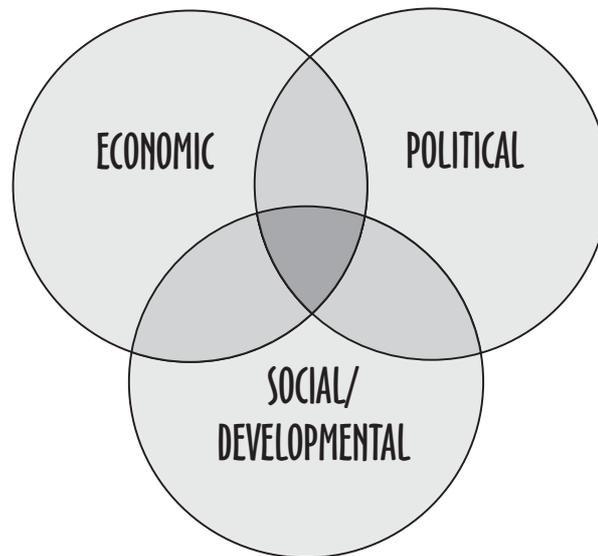
▷ **Economic** change, in the status of partner organisations and the partnership as a whole, is an anticipated outcome of most partnership agreements. Access to financial and material resources is one of the most frequently articulated motivations for developing partnership relationships. This is not, however, the only benefit that can accrue to partners.

For beneficiary communities, development programmes are frequently quantified in terms of change in economic status or opportunity.

▶ Partnerships also enable **Political** change in terms of shifting the locus and balance of power among participating people and organisations during the course of their relationship. In partnerships, the political change is often expressed in terms of justice and fairness, needs and strengths, and may call different organisations and individuals to the fore, to lead at different times and in different situations.

For beneficiary communities, development programmes should result in the community's increased access to decision-making and the "levers of power".

▶ The third aspect of change is in the **Social or Developmental** arena. Here we see changes in human and organisational capacity — skills are built, ideas exchanged, new theories developed, new energy uncovered. Without planning and recognition, however, a partnership could end without these exciting changes taking place and engaging all concerned.

For beneficiary communities, the social side of development programmes is becoming increasingly important to ensure sustainability and to enable communities to become increasingly active in their analysis of their contexts and more proactive in their responses.

This evaluative framework provides those working in partnership with an image of the different kinds of impact (in the organisation and in the beneficiary group) that they are striving towards. It is also a helpful reminder of some of the developmental (and indeed, political) values that underpin developmental partnership work.

"The significant problems we face cannot be solved at the same level of thinking we were in when we created them".
Einstein

The Partnership System: a process framework

A partnership can be seen as a system with inputs, processes, outputs and a life cycle. This framework (illustrated on page 20) helps to illustrate key components and processes in a partnership. While we comment briefly on each stage of the system, this publication focuses in particular on the beginnings of a partnership (the first three stages — choosing partners; inputs; and forming the partnership) and on some issues around working in relationship with people and groups.

Ideas for a Change Part 7b deals with the remaining stages of the cycle and looks at ways of maintaining, managing and monitoring developmental partnerships.

▶ **1. Choosing partners**

The partnership system starts with choosing partnering organisations — which are themselves systems (see *Ideas for a Change Part 3: Approaching Change. pp.38-43*). Each partner has their own vision, purpose, values and culture — the intangible aspects of organisational life which, in addition to the tangible inputs, are brought into the partnership.

▶ **2. Inputs**

In order to function, the system requires inputs — people, skills, material and financial resources, ideas, networks and so on. These inputs are frequently brought into the system by the partnering organisations, but may be sought out by the partnership itself. For example, a partnership could sub-contract another organisation for a specific set of tasks, or, more dramatically, could invite another organisation to join the partnership. Also, bear in mind that not all partnerships are formed around available funds and resources — a partnership could first form and then seek funding to support its work!

▶ **3. Forming the partnership**

Relationships between potential partners take time and energy to build and maintain. Forming relationships has to do with understanding and working with the tangible (and intangible) elements that each partner brings to the collaborative effort. Ideas need to be expressed and discussed, values clarified, methods of work explored, and personal and institutional relationships established.

Once the partner organisations have identified the challenge or opportunity they wish to pursue, and the purpose of the partnership has been determined, the real work of the partnership can begin. It is at this stage that we find the "heart of the partnership". Purposes, values and working norms are clarified and translated into action. Systems for managing the work and the relationships are developed and tested.

The Partnership System

1 Choosing partners

2 Inputs

3 Forming the partnership

4 Outputs, monitoring and feedback

5 Closure

6

IMPACT

7 Changes in the lives of beneficiaries

8 Changes in the partnering organisations

9 New beginnings?
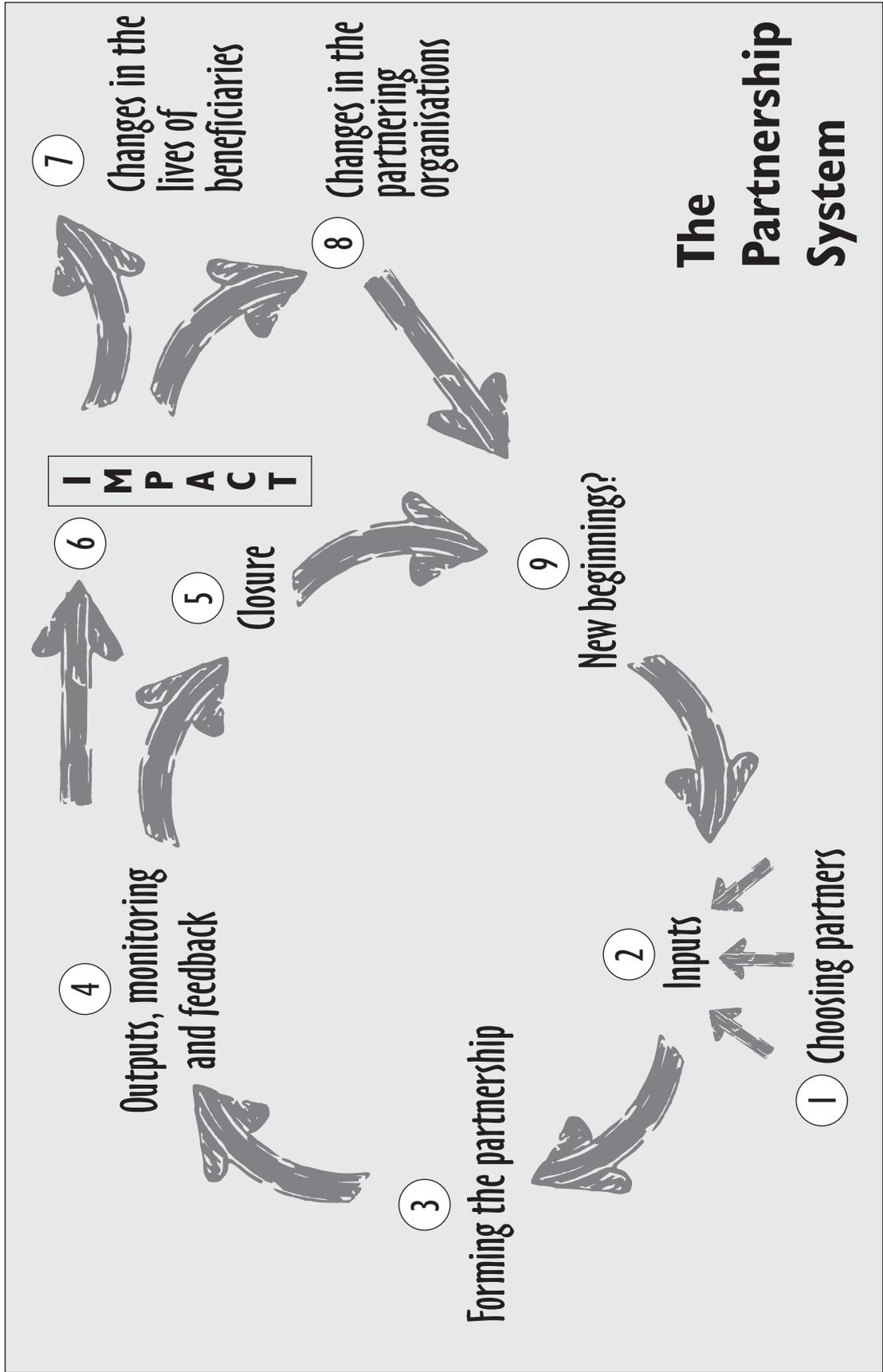
Resources are used. Further, this is the stage at which the contrasting imperatives of being an autonomous organisation, and working collaboratively, are thrown into sharp focus. Conflict may arise, discomfort may prevail, and there is the danger that focus may be lost.

▶ **4. Outputs, monitoring and feedback**

Through the process of the partnership, various activities are undertaken, enabling the partner organisations (and the partnership as a whole) to achieve its goals and deliver the desired goods and services to beneficiaries. As activities are undertaken, the partnership engages in monitoring activities to test whether or not deadlines are being met, budgets are being adhered to, each partner's performance is meeting agreed standards, and that the project outcomes are appropriate and useful. These are standard project monitoring activities.

In addition to these, however, the partners must monitor the relational aspects of their collaborative effort.
- Is the relationship holding?
- Are values and principles really shared and evident in practice?
- Is the relationship equitable or are responsibilities, benefits and credit/public recognition unfairly distributed?
- Does each participating organisation have a sense of self within the collective, or are identities blurred?
- What is being learned through the interaction of organisations and through the delivery of project services?

▶ **5. Closure of the partnership**

After the partnership has served its purpose, it is important for proper closure to take place. Partners need to recognise and celebrate the successes, challenges and learnings that have emerged from their work together. They also need to recognise that the explicit purpose for which they have come together is complete. Consider holding a "closing ritual" to honour the work you have done together, the relationships established, the changes undergone, and the independence of each organisation. Each one's new strengths and skills as well as their next challenges must also be acknowledged. If the partnership has been successful, there is no reason that a new one cannot be formed, but it is important that each liaison also has an end.

Closure is important because developmental partnerships, like other development interventions, are formed for a particular purpose and are, to a large extent, time-bound. Closure, while sometimes sad, can be very energising for those involved. Handled well, it releases new will and energy and opens up space for the next piece of work.

▶ 6. Impact

It is only some time *after* the partnership activities have ended and outputs have been delivered that impact can be felt (or measured). An impact evaluation of a partnership should focus on two important aspects: changes in the lives of beneficiaries and changes in the partnering organisations. Impact evaluations frequently look at the following aspects of a project/partnership:

- Context (the extent to which the goals of the project are attuned to the social needs);
- Input (the extent to which the strategy fits the goals);
- Process (the effectiveness of the systems, processes and relationships used throughout the intervention); and
- Product (the appropriateness and use of the outcomes, services and benefits of the intervention).

Before going on to consider the two primary aspects of impact, it is important to note that impact evaluation (whether focused on change in the lives of beneficiaries, or on organisational change) is often costly, both in time and money.

It is usually necessary to employ external evaluators to do the evaluation research (for the sake of objectivity), and they will need baseline data on each partner organisation and their target group, as well as documentation of the monitoring activities carried out during implementation. Therefore, if you intend to engage in an in-depth impact evaluation, you will need to put in place resources and systems to support this from the very beginning of your work together.

▶ 7. Changes in the lives of beneficiaries

The impact of a project and of a partnership, lies in the extent to which people's lives have been significantly and sustainably improved. This is frequently measured by the way beneficiaries use (and sustain their usage of) project and partnership outputs or deliverables. It can also be measured by the extent to which target groups engage others in the kinds of activities the partnership undertook, without the support of the participating organisations (e.g. the spread of skills, knowledge, technology). If the partnership has not achieved a change in the lives of the people its work was intended to benefit, then no matter how glorious the relationship, the partnership was not a success.

▶ 8. Changes in the partners

In addition to measuring change in the lives of beneficiaries, developmental partnerships can also effect organisational change and learning.

Some useful questions in exploring the impact on the partners are:
- To what extent and in what way has each partner organisation changed and benefited?
- How has each partner used the learning and experience gained from the partnership?
- Given that partnerships can be used as a pilot for structural change (especially in large bureaucracies), have partners seen and tested new ways of doing things, and have they spread these lessons internally?

▶ **9. New beginnings?**

Once the partnership is ended, each ex-partner organisation has a chance to absorb and assimilate the lessons it has learnt. When it enters into a new partnership, it will not bring the same skills, understanding or outlook that it brought to its previous partnership. And so, learning and growth become evident as they are integrated into the accepted practice of the organisation.

Levels of Complexity: a diagnostic and planning framework

The fourth framework, Levels of Complexity, is a diagnostic framework used by Organisation Development (OD) practitioners. Its use in organisation diagnosis was explored in *Ideas for a Change Part 2,* pages 30-31. In working with partnerships, this framework takes on new life as both a diagnostic and planning tool.

The Levels of Complexity framework (illustrated on page 24) is used to understand problems and issues in organisations, and helps us to understand and organise information about the issues facing an organisation. Once problems and their levels are identified, causes are sought. These usually lie at higher levels than the level at which the original problem manifested itself.

In partnerships work, the levels of complexity can be used not only to understand and resolve issues, but also to identify potential benefits and desired outcomes. Sound developmental partnerships focus their energies at the higher levels of complexity — importance is placed on values, purpose and change, not simply on the acquisition of resources or the drafting of a contract. "Money and systems do not meaningful partnerships make." Greater satisfaction is derived from higher-level benefits.

We have used the Levels of Complexity framework in constructing a number of the exercises and approaches suggested in *Section 3: Beginning to work in partnership*.

Levels of Complexity

Level	Diagnostic questions	Additional partnership considerations — potential benefits at all levels
Environment Problems and opportunities	• What is the problem or opportunity we're dealing with? • Is it important? • Do we have a common understanding of it? •	• Accelerated social development; • Potential for greater impact; • Potential for improved quality of product/service; • Partnerships build relationships, allowing for future joint action.
Vision and Purpose Goal	• Do we have a commonly understood and shared goal for dealing with the problem or building on the available opportunity?	• Enhances vision of integrated/holistic development; • Requires functional and strategic leadership in order to hold the partnership to its purpose; • Brings standards and coherence.
Values Shared values	• Do commonly shared values exist? • Which values are critical (e.g. trust, honesty, respect)? • How do we do what we do? • Have our values been translated into principles and practice?	• Unifying — provides common ground for diversity; • Can make us more human through working with others; • Demands maturity, but provides a sense of belonging; • Enables one to realise one's own identity.
Relationships Informal	• Who's in, who's out? • How will we work together (informal)?	• Skills transfer through collaboration; • Collecting, deepening and exchanging ideas and views; • Breaks down stereotypes; • Individual growth; • Partner organisations learn and develop; • Can transform competition to complementarity.
Systems and Structures Formal	• Form — how do we organise ourselves and our work? • What systems do we have/need to support our work?	• Eliminates duplication; • Division of labour; • Contracts.
Physical Resources Money, people/skills, time	• What do we have to run the system? • Do we have enough...?	• Sometimes a condition of funding; • Saves scarce resources.

Section 3: Seeing ourselves and choosing our partners

There are a number of questions that need to be answered for us to enter a partnership with "both eyes open". These include:

- What is driving our desire to enter a partnership?
- What can we bring to a partnership?
- Also, what do our answers to these questions imply about:
  — who our future partners might be?
  — what our future partners need to bring into the relationship?

Section 3 provides some ideas and exercises which will help you and your organisation to answer these questions and so make more informed and wise decisions when entering into a developmental partnership.

Operational reasons for entering partnerships

In Section 1 we noted a number of political imperatives for partnerships and pointed to the need to clarify their purpose and objectives[1]. Here, we focus on identifying some of the operational reasons for organisations entering into partnership with others and relate these to the *Levels of Complexity* framework (see page 24).

▶ **Community needs outstrip our capacity to deliver**

The complexity of community needs and desires, coupled with sectorally focused state and development agencies, frequently pushes organisations to find complementary partners. Organisations therefore seek out those that can assist them in meeting integrated or more holistically defined community needs by providing specialist inputs and assistance.

Seeking partnerships to enable an organisation or programme to "go to scale" is part of this motivation as well. For example, in many cases an organisation simply does not have the necessary people and skills to reach more than one district and would rather not compete with existing organisations in adjoining districts. Thus, a partnership is formed.

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1. It is beyond the scope of this publication (which focuses primarily on the relational aspects of partnerships) to introduce goal clarification and planning techniques. For a structured procedure for developing development goals and objectives, see *Project Planning for Development* (available from Olive Publications). Other titles in the *Ideas for a Change* series are also useful in this regard — *Part 2* in particular.

- In relation to the *Levels of Complexity* framework, developmental partnerships formed for these reasons are closely linked to the benefits and concerns of:
  - the Environment;
  - Vision/Purpose;
  - Values; and
  - Relationships levels.

▶ **Development Ethos**

An organisation may place a high value on collaboration, minimising duplication and unhealthy competition, or learning and sharing with others in the development field. It may also be an organisational value to focus on a particular area of specialisation which, while meeting a need, does not attempt to address all community issues. These values could lead your organisation into partnerships with like-minded organisations, complementary organisations and organisations with, and from whom, you feel you can learn.

- In relation to the *Levels of Complexity* framework, developmental partnerships formed for these reasons are closely linked to the benefits and concerns of the:
  - Values and
  - Relationships levels.

▶ **Contractual Obligations**

Perhaps the most mundane (and most common) reason for choosing to work in partnership, is out of contractual or donor requirements. Sometimes these partnerships come with pre-determined organisational partners (often with government departments, for example) but other times there is simply a requirement to bring others "on board".

Some donors and governments require that work is carried out "in a partnership" involving civil society organisations and government

> **"As a partnership proceeds, each partner better understands the needs of the other. In a true, committed partnership, both partners learn and change – they co-evolve."**
>
> Fritjof Capra

departments, leaving vague understandings of the kinds of relationships which are expected to be formed. In South Africa today, there is a great deal of scope and opportunity for non-governmental organisations (NGOs) and community based organisations (CBOs) to work with local authorities under the provisions of the Municipal Community Partnership White Paper, and even under the regulations governing the establishment of Integrated Development Plans (IDPs).

When "the contract" is the primary motivation for forming a partnership, the organisations involved first need to decide on the nature of the relationship. Are all parties striving towards building "developmental partnerships" (not impossible under these conditions) or are they simply hoping for a sub-contracting arrangement?

■ In relation to the *Levels of Complexity* framework, relationships formed for these reasons are closely linked to the benefits and concerns of the:
- Systems and Structures
- Resources levels

(It requires a great deal of effort to move the orientation to higher levels.)

Having ascertained the need to work in partnership, the first step any organisation should take is an audit of what it brings into partnership.

Preparing for Partnership

While this section is focused primarily on the early stages of partnering with other organisations, if you are already engaged in a partnership, you will find many of the suggestions and exercises useful in reviewing "how things stand" at any point in your relationship. With adaptations, they could form part of your regular monitoring of the partnership.

▶ **What Do We Bring?**

In preparation for developing a partnership, it is crucial that each organisation understands where it is, what it brings to a partnership, and what it hopes to gain and learn from the partnership. This is also true for the individuals (from each partnering organisation) involved, as it is through the motivation and efforts of people that the partnership will work.

The two exercises which follow will assist you to determine what you and your organisation bring into a partnership.

EXERCISE: Mini-audit

A "mini-audit" of organisation members' perceptions, can assist you to clarify how different people in the organisation see key issues, and to gain an organisational perspective on what you bring to the table. Below are a series of questions to guide you through the mini-audit.

Questions in the boxes relate specifically to potential partnerships.

After each member of the organisation (or project team) has worked on these issues alone, share your responses and reach a common understanding of the organisation's orientation to the (potential) partnership.

I. Environment
- What are the most important development challenges facing your target group?
- Which challenges come from the community itself (e.g. attitudes and behaviours) and which relate to external factors?
- What opportunities already exist to address the development needs of the community?
- What other organisations are engaged in addressing similar needs?

2. Vision & Purpose
- What is our vision for realistic change in the community?
- What needs to be built to enable that vision?
- Does the community share this vision? If not, what can be done to either revisit our understanding and/or work more closely with the community to develop a shared vision?
- How do we define our approach and our standards?
- Do we live up to our standards, or are they just a fantasy?
- Who else uses the same methodologies, to an acceptable minimum standard?
- Are these organisations trying to achieve a similar purpose?

3. Values
- What are the shared values of my organisation?
- Which values describe how we treat each other and our work and which ones describe our work in the community?
- How have I seen each value put into practice?
- What is our approach to development and is it informed by our values (in practice)?
- Which values are "bottom lines", those which must hold to ensure satisfaction in our work?
- Where might we compromise or be more flexible?
- How do our values translate into principles and practices?
- 2Which organisations do we know that share similar values and practices both internally and with communities?

4. Relationships

- How do we work with each other in the organisation?
- What is the flow of information like (and who is involved)?
- How do we relate to other organisations. Do we, for example, readily share information with others?
- What relationships do we already have outside the organisation?
- How could you describe these relationships? For example, are they mutually beneficial? Characterised by animosity?
- What barriers exist in the organisation (e.g. race, gender, age, language) in terms of our relationships with each other or with the outside world?

5. Systems and Structures

- How is work organised (e.g. by project or by department)?
- What are the formal channels of decision-making and communication?
- How much authority is devolved or delegated?
- What systems and structures (e.g. filing systems, management committee meetings) do we have to support us in our work?
- How well do they function?
- Are there any serious shortcomings that need to be addressed before we can work with others?

6. Physical Resources

- Do we have any special skills or infrastructure that we can offer?
- What pressures are there on existing resources?
- What do we have (in terms of funding, skills, people, computers, infrastructure, etc.) that can be used in partnership? (See *Ideas for a Change Part 1,* pages 20-22 for a resources audit exercise.)

EXERCISE: Clarifying your culture

Like people, organisations have their own cultures and ways of doing things. An organisation's culture may not be tangibly expressed in the same way that a mission statement is, for example, but the organisation's culture pervades all that it does. The culture of an organisation defines how work is done, who sets which standards and, often, how comfortable people feel in their working environment.

As potential partners, we bring not only the tangible, but also the intangible to the partnership. The different organisational cultures of partnering organisations may provide a site for synergy, or may completely undermine our ability to work collaboratively with others.

The following exercise could be done with members of your own organisation before entering into a partnership. It is also an interesting exercise to do with your partners, once a degree of trust has been built.

1. Write a short letter to a trusted friend (250 words at the most). The "friend" can be real or imagined as long as you assume that your friend is interested in absolutely everything you have to say and will read carefully. In the letter, describe what it is like to work in your organisation, a typical day perhaps. Be honest.

2. Read through the letter yourself and highlight all the "culture words". These are words that describe the characteristics or qualities of your organisation, whether positive or negative.

3. Break into small groups of three or four (if your organisation contains more than 4 or 5 people) and ask each person to share her/his culture words.

4. Still in your small groups, discuss the questions:
   - What are the different cultures/types in our organisation?
   - Which culture dominates?
   Use your culture words as clues when working with these questions.

5. Each small group prepares a flipchart with four statements its members want to make/share about your organisational culture.

6. Share these with the whole group (if possible, the whole organisation).

7. Discuss your organisation's cultural characteristics in terms of the following questions. Your answers will begin to provide some ideas about how your organisation might experience partnership.
   - Which characteristics will serve us well when working with others?
   - Which may undermine our ability to work with others?
   - In order to work well with us, what might the culture/characteristics of our partners be? Bear in mind that these need not be the same — for example, a flexible, creative climate might well benefit from some tight planning and more stringent control (and vice versa).

▶ Looking at Capacity

"Capacity" is not only one of the primary outcomes of working in partnership, it is also one of the primary needs. The model below encompasses three broad areas of capacity:

- conceptual;
- social; and
- technical.
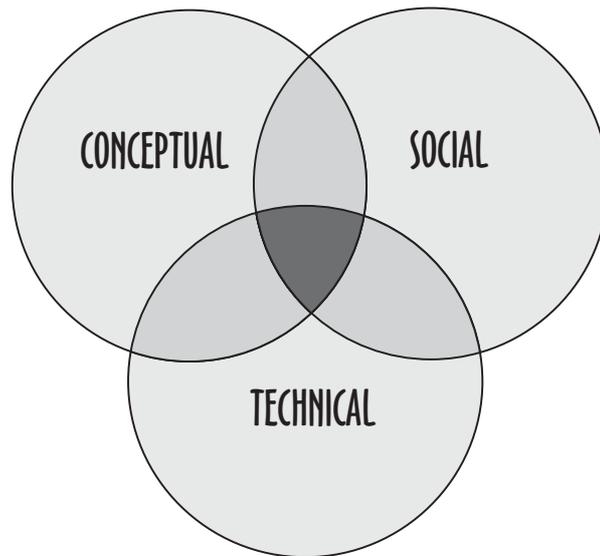
▼ Organisational capability for effectiveness

■ The **conceptual** area relates to the extent to which people and organisations work with knowledge, ideas and information, and their capabilities to vision, forecast, compare, synthesise and plan.

■ The **social** area relates to how effectively relationships are built, maintained and managed (both within the organisation and with outside parties); how well people in the organisation are developed to realise their potential and be effective in their work; people's capacity for negotiating, managing conflict, dealing with emotional issues and with feelings; and the balancing of personal and professional ethics.

■ The **technical** area incorporates a wide range of capabilities around "how to" get things done. This might include: how to set up systems; how to design, plan and implement activities; how to use technology; how to find, collate and distribute information; etc.

The exercise which follows is based on this model, and focuses on assessing the skills and abilities (the capabilities) of your organisation and the people that make it up.

EXERCISE: Assessing your organisational and individual capacity

Use the following questions to assess what you as an individual and as an organisation can offer to a partnership in terms of capacity. The exercise can be made more valuable by including some qualitative information such as:

- "Do I/my organisation have the ability to interpret information and help others make meaning?"

Possible responses to this question include:

- "Yes; excellent!"
- "Yes; passable; could be improved."
- "Yes; with support from outside the organisation."

A simple "No" is an uncommon response, as most of these capabilities can be acquired with support.

I. Conceptual capabilities
Do I/my organisation have:

- the ability to interpret information and help others to make meaning?
- analytical skills to enable the identification of opportunities, and the generation of options and alternatives?
- the ability to frame and pose questions in order to open up discussions, generate information and analysis, resolve deadlocks?
- the ability to synthesise information and data, creating new knowledge and meaning, as well as enabling a fresh view of issues and ideas?
- the ability to understand and engage in processes to enable the creation of knowledge and theory?
- strategic planning abilities which enable groups to draw on the past, hold the present and move into the future?
- leadership skills and abilities, especially those which create space and enable risk and innovation?
- evaluative abilities — the skills not only to set up an evaluation system, but also to use information generated through reflection to inform practice?
- organisational development (OD) skills and abilities to enhance learning and management throughout the partnership?
- skills which enable new people to join the partnership (through induction) as well as the development of institutional memory in the partnership?

2. Social capabilities
In our rush to get things done, social skills and abilities are frequently under-valued. In partnerships, where so much depends on developing, nurturing and maintaining relationships, the social realm of capacity requires renewed attention.
Do I/my organisation have:

- team building skills — the ability to build enthusiasm, commitment, unity, mutual accountability, coherence and a common vision?
- the ability to work with both conflict and resistance, to resolve conflicts and maintain harmony not through suppressing discussion, but by hearing dissent?

- the ability to effectively delegate work through recognising the potential of others in the team and enabling them to take greater responsibility for project activities as time goes on?
- language skills to ensure the representation and participation of all involved?
- a genuine interest in people, expressed through ease of communication, empathetic listening skills?
- the ability to adapt to situations, cultures, philosophies, policies, genders and races?
- the interest in and ability to mentor others and act as a positive role model?
- intrapersonal skills — the ability to work with oneself, enabling a better contribution to the team's work?
- intuitive abilities — the ability to read/understand at many levels, to see and appreciate sensitivities and contexts, and the ability to understand things emotionally as well as intellectually?

3. Technical Skills and Abilities[2]
Do I/my organisation have:
- facilitation skills to enable groups to reach a common understanding or make decisions and choices?
- skills associated with training and facilitation: small group management, meeting and workshop management, negotiation skills?
- communication skills and systems, including writing skills, specific skills for using the communication system, language proficiency, etc.?
- financial management skills to enable clear accounting for resources to communities, partners and donors?
- administrative skills to design and run systems for the upkeep of the partnership and project activities?
- project management skills including planning and co-ordination, as well as the skills necessary to build and utilise monitoring systems?

Until we are aware of who we are, what we bring and what we want, we cannot hope to meet our own needs or the needs of others.

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2. The technical capabilities referred to in this section do not relate to project specific skills (e.g. installing a hand-pump). We assume that these skills are present, if required.

EXERCISE: Your partnership's capacity — finding gaps, strengths and weaknesses

The following exercise is useful to do during the setting up phase of your partnership (before any contracts are signed!). It is best to do it in a meeting of all those directly involved in the partnership, as all their information will be required if you are to get a clear picture of your partnerships strengths, weaknesses and skill deficits.

1. List the objectives of the partnership. If you intend to form a developmental partnership, as discussed in this publication, your list should include a few objectives that will be fulfilled by the process of working in partnership itself (e.g. skills transfer, developed networks, etc.).

2. For each objective in turn, brainstorm the kinds of skills and capabilities which will be necessary to achieve it (see Looking at capacity, p31-33). Make a general list of these capabilities.

3. Draw up a matrix: capacities (one per row) in the first column; names of partner organisations as headers on the tops of the other columns.

4. For each row/capabilities, assess on a scale of 1-5 the extent to which that organisation, and the people working in the partnership can contribute that capability.

5. Analyse the matrix, asking questions such as:
    *   Are there gaps?
    *   Are the gaps glaring?
    *   Do we need a new partner or should we sub-contract an organisation/person with the missing skills?
    *   How can we build our own capacity over time?
    *   Do we all offer the same capabilities, or do we complement each other?

Example: In the example below, there is a balance of the required capabilities and the partner organisations have complementary skills.

Capabilities	Organisation X	Organisation Y
Training course design	3	5
Facilitation	5	2
Course co-ordination	4	4
Materials development	1	4
Financial management	5	4

▶ Checking the Match

Having determined what your own organisation brings to a partnership — and perhaps some of what your organisation might get out of a partnership — it is time to check your compatibility with the other partner(s).

In order for the partnership to work, it is not necessary that you chose a partner that is a mirror image of your own organisation. As indicated in the mini-audit (pages 27-28), it is important for organisations to determine their "bottom lines" — values, boundaries and practices about which compromise is not an option. Organisations must also determine, first for themselves, what it is that makes them the "Partner of Choice" or what needs to be built to enable this. Then, when it comes to choosing partners, we are able to seek out organisations that complement our own work and abilities (i.e. where we are weak or less skilled, our partners should ideally be stronger or have greater capacity).

It then becomes possible to find partners:
- who share the same core values, principles and approaches;
- have relevant capabilities (and, sometimes, resources); and
- have something to gain from the relationship.

This section provides two tools to assess the potential for a successful partnership between organisations and to find the right partner for the right purpose.

EXERCISE: Quadrants of motivation

Each organisation entering a partnership is likely to have differing levels of interest/will and capacity/skill in relation to each of the objectives of the partnership.

The quadrants of motivation (see diagram opposite) allow you to map the relationships between your objectives and each partner's capacity and interest in working on them. (See the example on page 38.)
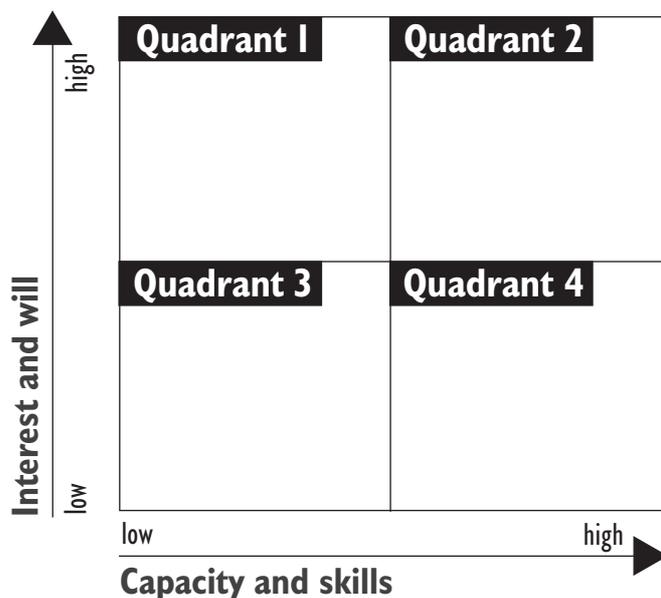
	Capacity and skills →	
Quadrant 1	**Quadrant 2**	high ↑
Quadrant 3	**Quadrant 4**	low
low	high →	

Interest and will (vertical axis, low to high)

Capacity and skills (horizontal axis, low to high)

■ Quadrant I

Organisations falling into Quadrant I with regard to a specific objective have:

- high levels of will and interest, but
- low levels of skill and capacity.

In this case, there is the opportunity for the organisation to develop its capacity in this particular area. This does not present any difficulties, unless all of the partners lack skill in performing the work required to achieve this objective. If this is so, it may be necessary to:

- bring in a more skilled partner;
- subcontract someone with the required skills;
- develop the required skills within one of the partner organisations (this may take longer than is feasible); or
- re-evaluate the appropriateness of the partnership and/or the design of the intervention.

■ Quadrant 2

Organisations falling into Quadrant 2 with regard to a specific objective have:

- high levels of will and interest, and
- high levels of skill and capacity.

On the one hand, this is an ideal situation, and both will and capacity are present in abundance. However, if all the organisations involved in your partnership appear in Quadrant 2, what value are you adding by working together?

It may be that in order to "go to scale" more than one organisation is needed, or that you want to experience a "safe" partnership arrangement before embarking on more risky relationships. Whatever the case, all partners should be aware of their motivation for being involved and share this with each other.

■ Quadrant 3

Organisations falling into Quadrant 3 with regard to a specific objective have:

- low levels of will and interest, and
- low levels of skill and capacity.

This is the quadrant of death! Little interest coupled with low skill levels do not bode well for a partnership relationship, or for the success of your work together. If many of the organisations involved fall into this category for many of your objectives, seriously consider abandoning the partnership and seeking another way of achieving your purpose.

▪ Quadrant 4

Organisations falling into Quadrant 4 with regard to a specific objective have:

- low levels of will and interest, and
- high levels of skill and capacity.

This need not be a problem, unless one or more of the partners falls in this quadrant in relation to most of the objectives. If this is the case, it is important to ask why that partner seeks to be involved. The reason may involve a contract that must be honoured or a simple need for cash flow.

Such partners can be valuable as their skill levels are high, but working together on the relational aspects of your partnership is likely to prove difficult. Attempting to share learning and redistribute knowledge can also be problematic, as commitment to the developmental aspects of the partnership is likely to be low and an "expert" orientation may develop.

Follow these steps in order to map your partnership or prospective partnership on the quadrants (see the example on page 38):

1. Make a list of the main objectives and outcomes of the project. Assign a symbol to each objective.

2. Make a list of the potential partner organisations and assign a letter of the alphabet to each.

3. Draw a box with four windows and label it as in the diagram on page 38. The vertical axis represents each organisation's interest and will to be involved in working towards the various objectives or outcomes of the project (the extent to which this objective contributes to the organisation's own vision and purpose and fits with its development approach). The horizontal axis, read from left to right, represents the skills/capacity available to engage in project work that will lead to the achievement of the objective.

4. Look at the list of objectives one by one in relation to each partner. Each time ask:

    - Does this organisation currently have sufficient skills and capacity to fulfil this objective? (If insufficient capacity, the organisation will fall to the left of the centre line. If sufficient capacity, the organisation will fall to the right of the centre line.)

    - How significantly does this objective contribute to the organisation's purpose? (If the objective is significant in relation to the organisation's purpose, it will lie above the centre line. If the objective is not significant in relation to the organisation's purpose, it will lie below the centre line.)

    On the basis of your answers to these questions, choose which quadrant the organisation will fall into for each objective.

Analyse the results of this exercise (see the example on page 38).

If you are in a "good" or potentially strong partnership, everyone will be interested (the majority of symbols and letters will be in Quadrants 1 and 2), and all partners will be in a position to contribute skills and capacity to at least some of the objectives (Quadrants 2 and 4).

Quadrant 1

Quadrant 2

Quadrant 3

Quadrant 4

Interest and will — high / low

Capacity and skills — low / high
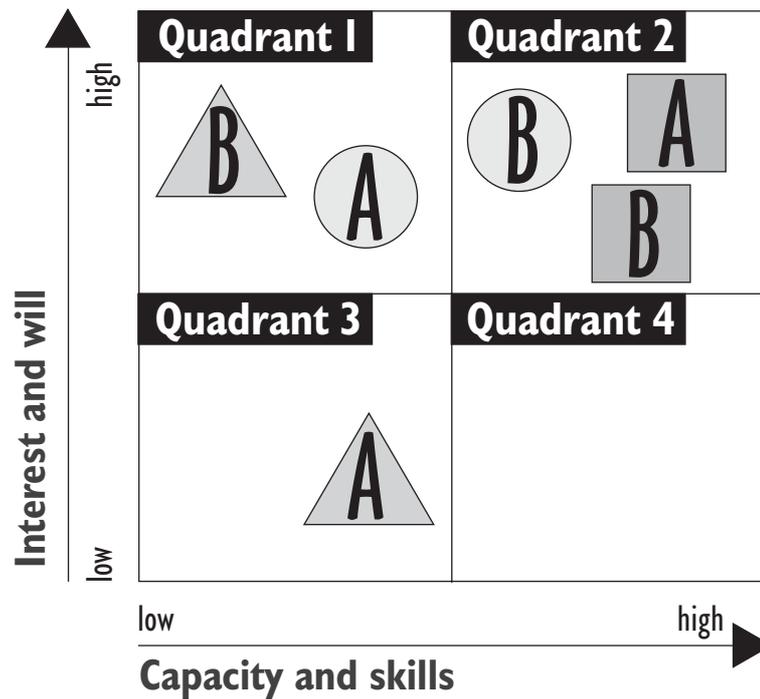
KEY:

◯ Objective 1   Organisation A

▢ Objective 2   Organisation B

△ Objective 3

■ **Example:**

Based on the explanations on pages 36-37, we can analyse the diagram above as follows:

- The partnership between Organisations A and Organisation B has a fair chance of success. There are some potential concerns though.

- Organisation A has neither interest nor skill in Objective 3 (see Quadrant 3). Organisation B does have the interest, but is low on capacity and skills (see Quadrant 1). Therefore, it is possible that Organisation B will be left to carry this objective alone.

- Organisation A has space to develop capacity in relation to Objective 1 by working with Organisation B. However, it is somewhat concerning that Organisation B has little to learn from Organisation A in any area because Organisation B has higher levels of capacity and skills in relation to all three objectives. This partnership, therefore, is not necessarily developmental for both parties .

Section 4: Entering the relationship — people, groups and polarities

Before concluding, we leave you with two models that begin to open up the issues of maintaining, managing and working within partnerships. By this point in your relationship, it is likely that you will (perhaps with the help of some of the exercises and ideas suggested up to now) decided whether or not to enter into partnership with a prospective organisation or organisations.

Since your partnership involves more than one unique organisation or party, it is inevitable that a number of different views, opinions and preferences around exactly what to do and how to do it will emerge.

Four of these tensions, introduced in the first model (see below), are explained as *Partnership Polarities*:
* Motivation polarity
* Equity/Equality principle polarity
* Boundary management polarity
* Output orientation polarity

Further, the work of your partnership is likely to be held by a core group of people from the organisations involved. We therefore introduce a second model which may assist you in working with the partnership group in its various stages of life — *Phases of Group Development* (page 43).

Partnership Polarities

Working in partnership with others is often a balancing act which requires partnering organisations (and individuals) to hold and work with numerous competing imperatives. One useful way of looking at these tensions is by framing them as "polarities". A polarity is a way of illustrating the tension between extreme states of one facet in the life of an organisation, partnership or person.

For example, one polarity relates to time:

Past ——————————————— Present ——————————————— Future

On the one extreme, a person could focus most of their energy on the past, or on the other extreme, focus almost exclusively on the future. A future orientation is helpful in visioning, dreaming, strategising and planning. Its "shadow side" can be expressed as little capacity to reflect on and learn from the past, or to work in the present. A past orientation is valuable when reflection and learning from
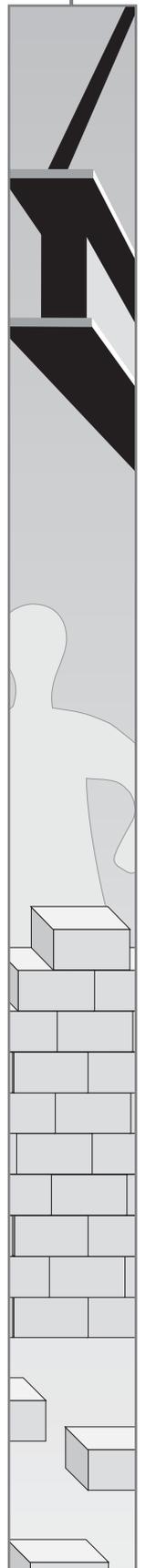
experience are necessary. Its "shadow side" is that one may be unable to deal with activities that need to be done in the present, or to engage in visioning and planning.

The *Partnership Polarities*[1] identified below, illustrate the unique nature of working in partnership, and the need to be aware of, and work with, a number of different factors and priorities simultaneously. The purpose of working with the polarities is not to leap from one extreme to the other, nor is it to pass judgement on the "right" approach. Rather, our objective is to become aware of, and to engage with, the tensions on either extreme, and to find a middle/holding point which recognises the value and limitations of each extreme (the "point of balance" in the pictures below).

When reading the material that follows, bear in mind that most people, organisations and partnerships fall closer to one or other "extreme" of any given polarity. Recognising and owning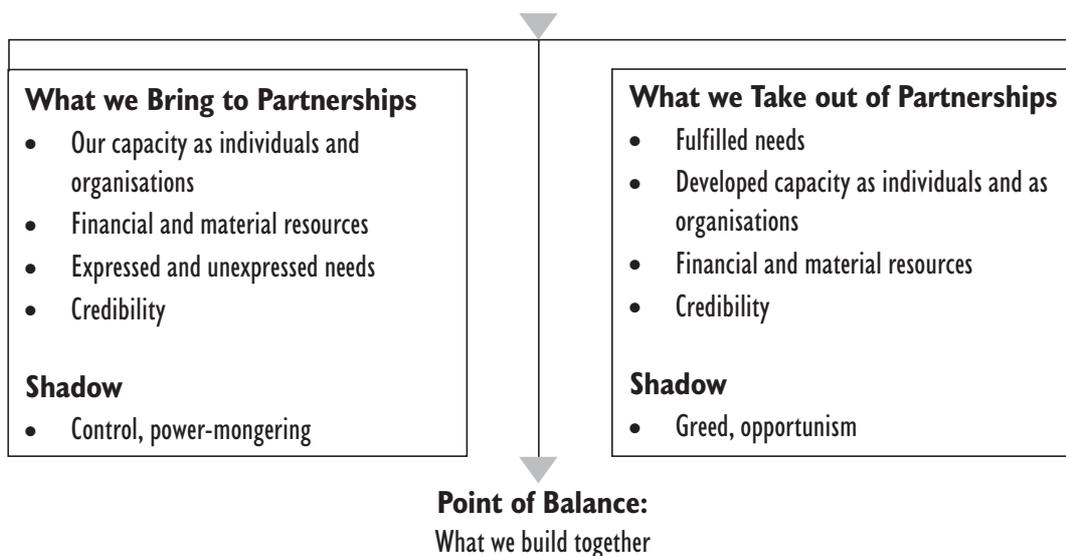 one's orientation makes it possible to work more consciously towards healthy, functional partnerships. In the case of each polarity consider the following questions:

- Which end of each polarity do I; my organisation; our partnership; feel closer to or identify more with?

- What implications does this have for our partnership and its work?

▶ Motivation Polarity

This polarity is about what we are willing to bring into a relationship (inputs) and what we want to get out of the partnership (benefits in terms of material and financial resources and people/skills).

What we Bring to Partnerships	**What we Take out of Partnerships**
• Our capacity as individuals and organisations	• Fulfilled needs
• Financial and material resources	• Developed capacity as individuals and as organisations
• Expressed and unexpressed needs	• Financial and material resources
• Credibility	• Credibility
Shadow	**Shadow**
• Control, power-mongering	• Greed, opportunism

Point of Balance:
What we build together

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1. We wish to acknowledge our colleague, Mario van Boeschoten, for introducing Olive to the concept of polarities. The specific "partnership polarities" included here are adapted, with acknowledgement and thanks, from the work of Gavin Anderssen.

▶ Equity/Equality Principle Polarity

This polarity is about how benefits are divided and different organisations' inputs are determined and valued in a partnership. Here, the point of balance refers to the fact that the principle of equality might guide decisions in some cases (e.g. all income is divided on an equal basis), while the principle of equity would come into play in others (e.g. different parties gain different skills according to their needs).

Equity

- Fairness — organisations put in what they are capable of. Need plays a role in determining the type of benefit which accrues to different partners, as does relative contribution to the partnership
- Different partners contribute and benefit differently, but within agreed parameters or frameworks
- Responsibilities are assigned and variable (access to rewards/benefits is frequently tied to responsibility)

Shadow

- Entrenched inequality and lopsided benefits (and contribution)
- Exploitation of either stronger or weaker partners

Equality

- Uniformity — all contribute and benefit in exactly the same manner; benefits are divided amongst partners irrespective of the relative contribution of each
- Rights — all partners share the same rights in the relationship, but these rights are divorced from responsibilities

Shadow

- Sameness — the absence of both risk and innovation

Point of Balance:
Mutually beneficial to all parties

▶ Boundary Management Polarity

This polarity is about being able to differentiate between what belongs to my organisation, and what belongs to the partnership in terms of needs, resources and identity.

My Organisation

- Autonomy, independence
- Purpose; vision; values; culture
- Working norms, principles
- Recognition of organisation's identity

Shadow

- Inflexibility, organisational selfishness
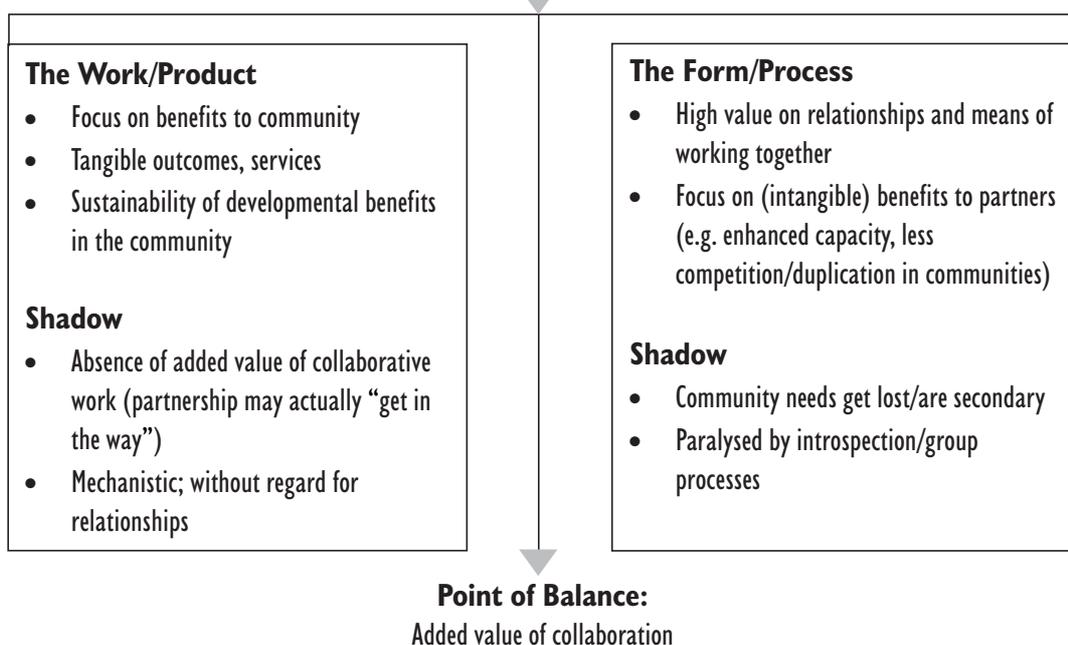- Expecting members of other organisations to conform to pre-established norms, etc.

The Partnership

- Shared/mutually agreed identity; vision; values; purpose; working norms; etc.
- Dependent upon component parts
- Devotion to the partnership

Shadow

- Group think
- Dependence
- Loss of singular identities of the partners

Point of Balance:
Interdependence

▶ Output Orientation Polarity

This polarity has to do with what the partnership envisages itself achieving, whether in actual implementation (product), or in the process of working together.

The Work/Product

- Focus on benefits to community
- Tangible outcomes, services
- Sustainability of developmental benefits in the community

Shadow

- Absence of added value of collaborative work (partnership may actually "get in the way")
- Mechanistic; without regard for relationships

The Form/Process

- High value on relationships and means of working together
- Focus on (intangible) benefits to partners (e.g. enhanced capacity, less competition/duplication in communities)

Shadow

- Community needs get lost/are secondary
- Paralysed by introspection/group processes

Point of Balance:
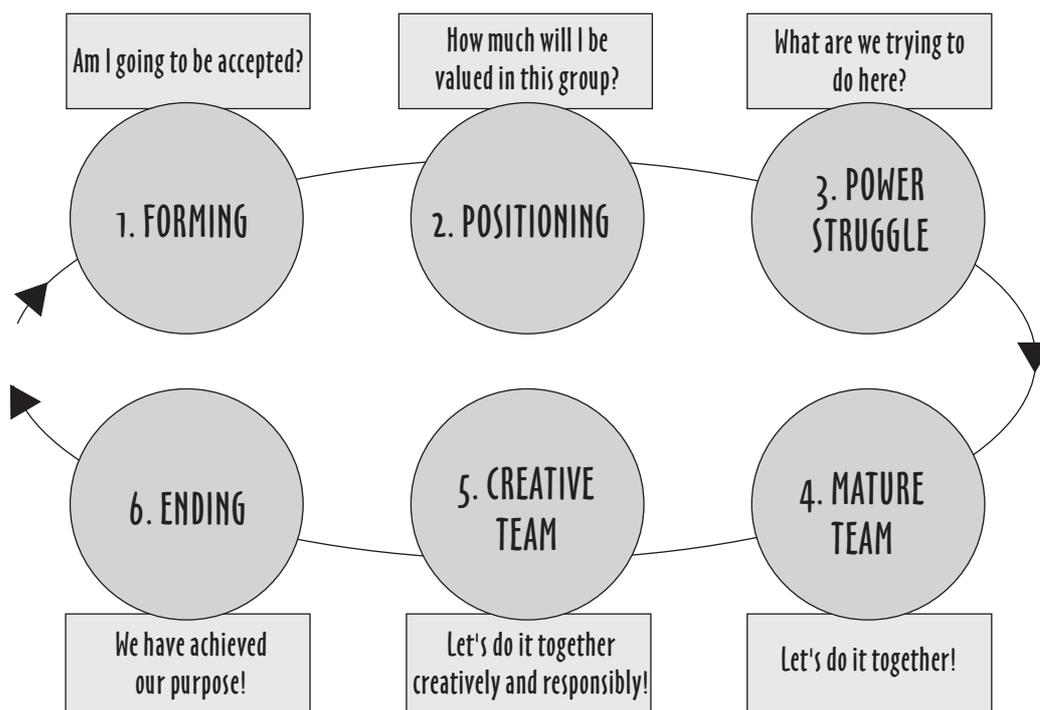Added value of collaboration

Phases of group development[2]

The following model provides a way of understanding the phases your partnership group (the people holding and co-ordinating the relationship and its work) is likely to go through. It also provides some tips around what might help the group to move on to the next phase of its development.

In making use of this model bear in mind that:

- it is not cast in stone — some groups never move past the first two or three phases; others move very quickly, and hardly notice that they have passed through a phase;
- the phases appear in the sequence in which they usually occur — your group *may* be different;
- when group members leave, or new members join, it is common for the group to regress to an earlier phase (although it is usually possible to return to your previous level of functioning quite rapidly).

| Am I going to be accepted? | How much will I be valued in this group? | What are we trying to do here? |

1. FORMING   2. POSITIONING   3. POWER STRUGGLE

6. ENDING   5. CREATIVE TEAM   4. MATURE TEAM

| We have achieved our purpose! | Let's do it together creatively and responsibly! | Let's do it together! |

▶ I. Forming

This is the first phase that groups enter. The main question underlying group members behaviour at this point tends to be: "Am I going to be accepted?"

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2. This is an adaptation of a model formulated by Mario van Boeschoten.

Characteristics of forming:

- initially people are very polite; they smile a lot and wear "masks" to cover their insecurity;
- all arguments and controversies are avoided;
- conflict is avoided and/or projected outward e.g. "This is their (non-group members') fault/problem";
- very little proper work can be done during this phase.

This pattern of behaviour normally comes to a natural end after some time. The process of moving past forming can be facilitated by:

- making an effort to reach shared understanding of the issues facing the group or partnership;
- using "ice-breakers" to get past the "stuckness";
- providing opportunities for people to "come out from behind their masks";
- putting systems and procedures in place to help people engage with each other and the group (e.g. a structured feedback system which allows group members to give and receive praise and constructive criticism).

▶ 2. Positioning

In the second phase, people ask: "How much will I be valued by this group?"

Characteristics of positioning:

- people seek out others in the group in order to form temporary alliances;
- some claim positions of leadership — if the group does not respond favourably or ignores their claim, they either withdraw or push yet harder (fight or flight);
- there is some debate, but its purpose is mainly to "score points" with/against others, thus little of value comes of it;
- this can be an emotional phase, as people fall back on their individual interests and protect these.

This pattern of behaviour can continue for a long time (even indefinitely, if co-operation is not valued or really required, although this is seldom the case in partnerships). However, until the group has moved beyond this phase, the partnership will be ineffectual, although individual members may achieve some objectives.

▶ 3. Power Struggle

After spending time moving through the first two phases, the question: "What are we actually trying to achieve here?" and the statement: "We need to get something done!" begin to dominate. This can lead in one of two broad directions:

A call for law and order: **OR**

- appoint a chair and scribe;
- exclude all personal matters from meetings;
- formulate rules and orders and require that members conform to them;
- without exception, meetings are *proper*;
- people are assigned tasks and have to account to the group for their completion.

A call for common purpose:

- central questions here are: "Where do we want to go together? What have we actually got to work with?";
- find the purpose of the group's work and identify a process to move towards it together;
- identify procedures that will support the group in achieving its purpose;
- bring the human being back into the picture and the group;
- look at and work with relationships;
- integrate the task and the person;
- introduce an element of evaluation and self-evaluation.

From this point on movement through the phases of group development requires *conscious choice*. There is no longer a natural flow from phase to phase.
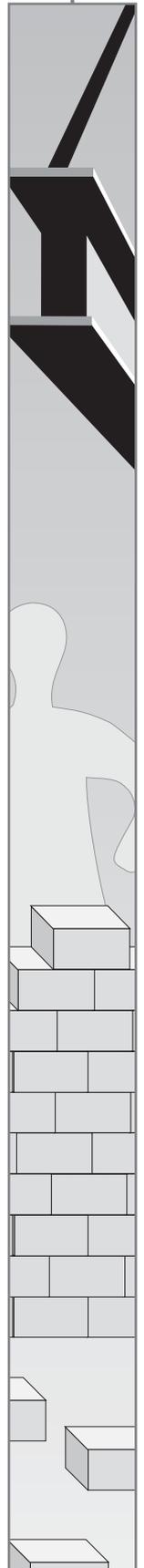
▶ 4. Mature Team

The key words at this stage are: "Let's do it together!"

Characteristics of a mature team:
Based on agreement to co-operate with each other, people:

- listen to each other;
- ask questions for information;
- give and receive constructive criticism/feedback;
- take initiative;
- conflict is seen as normal and is worked with;
- group members consciously support group formation, search for solutions and agree on appropriate "rules"/procedures (which are not fixed, but change as necessary);
- diversity is encouraged and valued;
- although the word "team" may well have been used previously, the group only really becomes a team (with a shared purpose) at this stage of its development;

- there is a recognition that when a new member joins, a new team is formed;
- members notice, clarify purpose and support and challenge each other.

The quality that identifies a mature team is that the group doesn't "close off"; it remains open to others.

▶ 5. Creative Team

The key words at this stage are: "Let's do it together creatively and responsibly!"

As for the mature team, the purpose is clear and people adapt systems and procedures when necessary.

Characteristics of the creative team are:
- team members take responsibility for one another's development;
- members offer and give support to each other during difficult patches;
- members have developed an inner security and creativity which has a positive affect on their outer creativity and work.

▶ 6. Ending

Hopefully, the key words at this stage are: "We have achieved our purpose!"

Mature and creative teams will naturally look for an appropriate process for closure. This may take the form of:
- a ritual
- documenting (and perhaps publishing) the team's work;
- debriefing the process and thanking each other;
- throwing a party!

Such teams end with little or no nostalgia, and their closure frees up energy for the next piece of work, or the next partnership.

Section 5: In conclusion

We hope you have found this introduction to developmental partnerships — and how to begin working in and with them — useful and interesting.

Ideas for a Change Part 7a has provided a number of **frameworks and models** for understanding partnerships (pages 15-24), and has moved through the first three stages of the **Partnership System** (pages 19-23), namely:

- choosing partners;
- inputs; and
- forming the partnership.

We have also begun to work with some of the human-centred aspects of partnership work, by introducing the **Partnership Polarities** (page 39) and the **Phases of Group Development** (page 43).

Ideas for a Change Part 7b, the second publication in this two-part focus on developmental partnerships, completes our journey through the partnership system and provides more ideas and exercises around maintaining, managing and monitoring partnerships.

We do hope that you will find the information in both books useful and thought-provoking not only in your work with developmental partnerships, but also in your work with other organisations.

We would welcome your feedback on the content of this book, especially on what information you found useful and valuable and on which parts of the book you've made use of. We would also like to know if you found any of the content unhelpful or inappropriate.

We wish you luck and success as you begin to work together in developmental partnerships!

Notes: