

## Partnership Toolkit

Partnerships are a valuable tool for any organization looking to expand or strengthen services in the community. In a well-functioning partnership, all members contribute ideas to the group, coordinate dates and events so that all can participate, and mutually benefit from the partnership. There are several ways to establish a partnership and many tools to use that can help organize and manage the operations.

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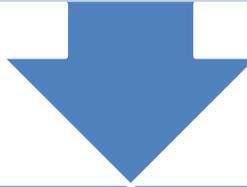


### 3 Types of Partnerships

Partnerships can take many forms and be organized in many ways. Below are three examples of partnerships, in various stages of development. The results of an organized and well-established partnership are evident in the results the partnership produces.

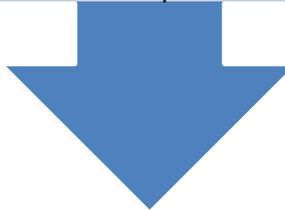
#### Well-Developed

Funders approached the legal service providers of Alameda and Contra Costa counties to collaborate on naturalization services. As a collaborative, they have a joint calendar listing all events for the year for each organization to avoid scheduling conflicts. One of the main goals of the collaborative is to offer workshops to the community. Each organization has committed to send 2 people to each workshop. The lead organization for each workshop sets the fee and organizes the outreach. Volunteers are contacted through the Collaborative Google Doc.



#### In-Progress

This small, Mid-West program occasionally collaborates with 2 other local service providers, and recently, these 3 groups discussed divving up the service needs of the community. Each program would try to take specific kinds of cases to avoid competing with the other two agencies in the community. For CIR, the three organizations have discussed partnering with the city's Legal Aid office, which could hire an attorney to staff an appointment line. Any client seeking legal services would call this main number, and the attorney would screen the case over the phone. The attorney would access the appointment calendar of all 3 offices and schedule an appointment at whichever organization has availability. The three organizations are considering offering legalization workshops together once the new law passes.



#### Needs Attention

On March 31<sup>st</sup> Jack's Immigration Hut held a naturalization workshop at the local synagogue. Most of the eligible applicants were turned away because there were not enough volunteers or staff to help. G-28s were not submitted for those applications completed. Many volunteers had just spent the last weekend at a DACA workshop and staff from other agencies were celebrating Easter or at César Chávez day events. The funders were disappointed at the number served at this event.



## Continuum of Collaboration

(created and contributed by the Immigrant Legal Resource Center)

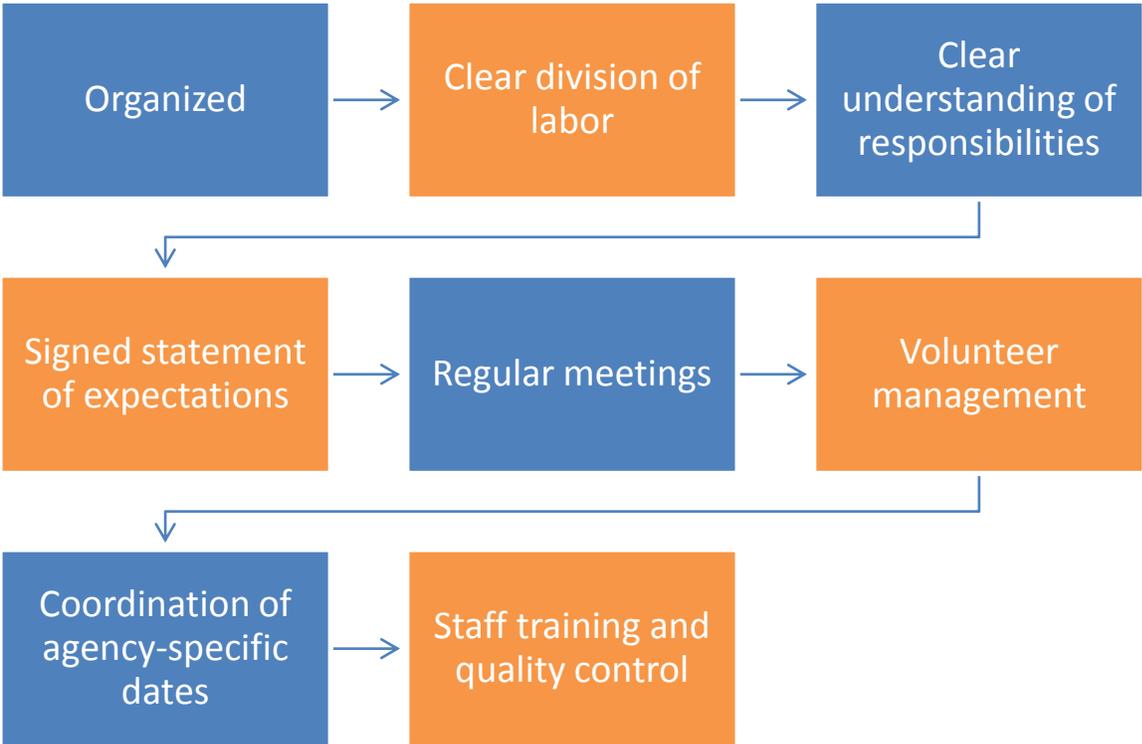
Where is your partnership on this spectrum? Is it where you'd like it to be?

	NETWORKING	COORDINATION	COOPERATION	COLLABORATION
Information sharing	No information sharing; after-the-fact updates	Provide information to each other as needed (e.g., share time and date of upcoming workshops)	Share information and resources to address common issues (e.g., create shared calendar of workshops; provide contact information for volunteers)	Share ideas and resources to accomplish shared vision and impact benchmarks (e.g., calendar is a planning tool for joint workshops; joint volunteer database)
Roles	Loosely defined roles (e.g., understand role of other partners, may provide general info to clients; workshops done separately)	Somewhat defined roles (e.g., may make referrals but without written agreements; most workshops done separately but coordinate scheduling to avoid conflicts)	Defined roles (does not include defined times or budget); most workshops done independently but partners help each other out	Roles and time are formalized (e.g. MOUs, may develop joint budgets); most workshops are planned and executed collaboratively
Communication	Little communication, sporadic	Formal communication (e.g., core group of people communicating)	Frequent and clear communication	Communication is highly developed and characterized by mutual trust
Decision making	All decisions are made independently	Some shared decision making	Decision making is done jointly	Decision making is done jointly



**Guidelines for Working within a Partnership**

An effective partnership requires time, effort and compromise. Several characteristics of a strong partnership appear below. It is important to set expectations in the beginning of a partnership or new project so that all parties know what resources, time and effort is expected.



## Choosing Partners Carefully: What to Look For In a Potential Partner

Certain characteristics of a partnership create a higher likelihood of success. It is important to seek out potential partners who have these characteristics, and it is equally important to think twice when seeing any of the warning signs.

### Characteristics of a good partner

- Long term partner potential
- Shared interest
- Has expertise in a different area
- Offers a service you don't
- Is reliable and organized
- Is willing to coordinate the partnership
- Attracts different populations
- Already has a volunteer pool

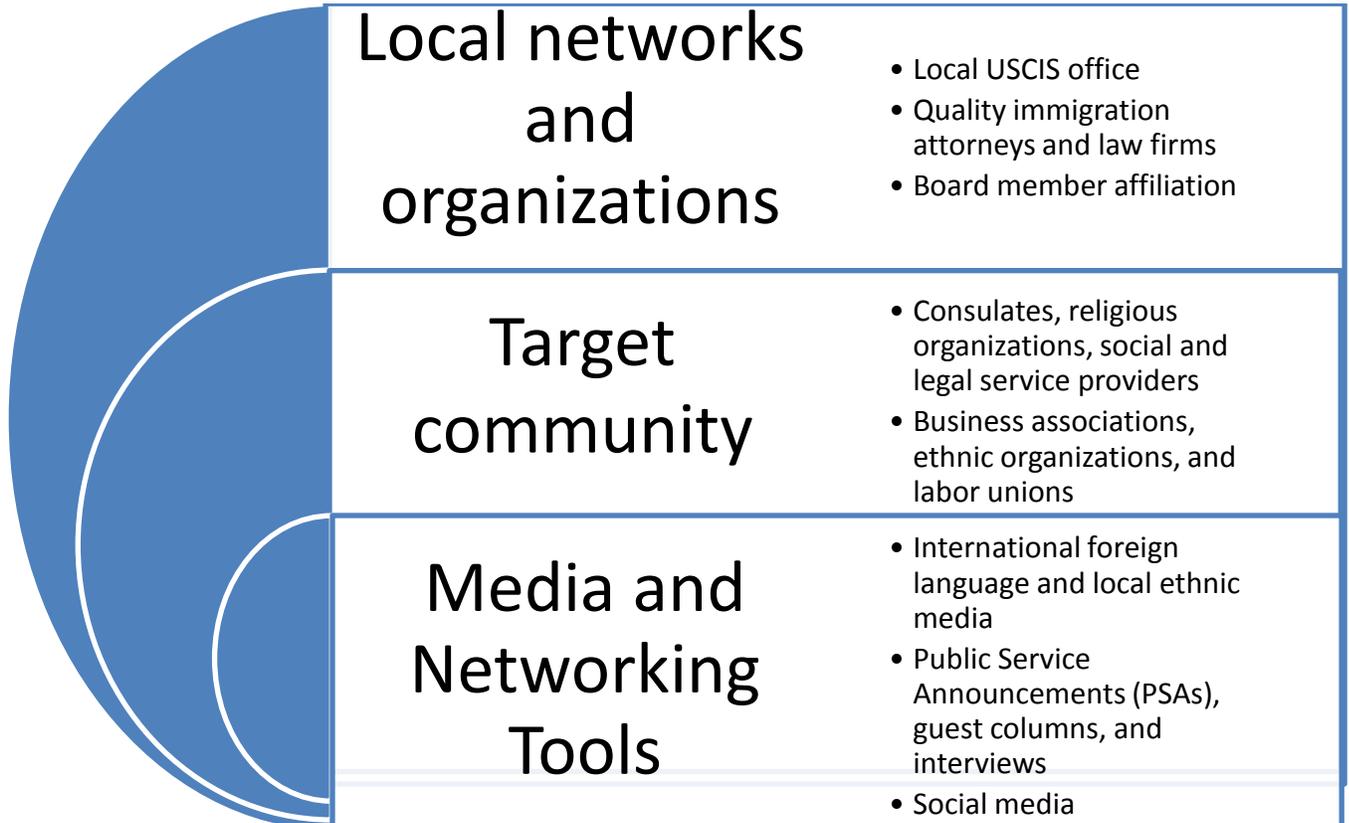
### Warning signs of a potentially challenging partner

- Bad reputation
- Past negative experience
- Funders are wary
- Doesn't want to coordinate partnership
- Hard to get a hold of
- Engaged in the unauthorized practice of law
- Overpromises

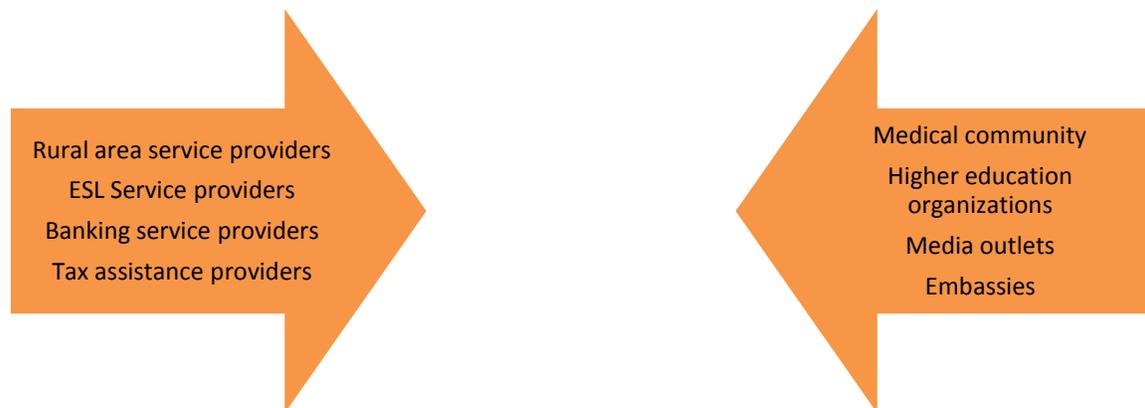


## Finding Partners

There are many places to look for potential partners. Particularly when planning for Comprehensive Immigration Reform, it is important to seek partners in various sectors and in new places. It is advisable to think outside the box and consider partners that offer different services that your organization so your reach is broader and you appeal to a wider audience.



## Ideas for Nontraditional Partners



## **Tools for Managing a Partnership**

There are several tools that partners can create that will improve the functionality of a partnership by increasing communication, outlining responsibilities, and ensuring that all parties are on the same page. It is vitally important that all partners understand what is required of each organization's resources, time, volunteer base and client base before projects and events are jointly planned. It is helpful if all partners engage in creating tools that allow for sharing of information, volunteers, event dates, media contacts and other items important to the goals of the partnership. Included in this toolkit are a few model tools for you to use when developing documents for your partnership.

- Guidelines for Creating an MOU for a Partnership
- Organizational Responsibility Chart 1
- Organizational Responsibility Chart 2



## Guidelines for Creating an MOU for a Partnership

Creating a Memorandum of Understanding (MOU) is an essential step to setting up an effective partnership. A well-constructed MOU sets out expectations of the partnership and of each partner. It outlines the responsibilities and obligations of all partners, as well as establishes rules and requirements for communication and other forms of participation. If the partnership is receiving funding, the operating procedures for managing the funding, disbursement, and reporting should be outlined. All parties involved in the partnership should sign the MOU. Below is some key information to be included in the MOU:

- Contact information for a primary point of contact for each organization
- Project goal or overall intent of partnership
- Renewal date of MOU or limit to term of MOU
- Responsibilities for each party. Can include:
  - Obligation to designate point person to receive all communications
  - Obligation to attend monthly meetings
  - Obligation to share important organizational events with the partnership to avoid conflict
  - Obligation to promote shared events
  - Obligation to provide agreed upon resources
  - Obligation to use marketing/branding materials jointly agreed upon
  - Obligation to highlight partnership, its events and other partners on organization's website
  - Obligation to participate/contribute in data collection efforts
  - Numerical goals for each partner, if applicable
  - Obligation to remain current in authorized practice of law requirements
  - Obligation to keep relevant staff up to date in immigration law changes
  - Obligation to conform with any funder reporting and funding requirements
- Dates of any reports required
- Projected dates of partnership activities
- Reasons for which the partnership may be dissolved
- Guidelines for speaking to media
- Limitations of the partnership
- How any received funding will be dispersed
- How the partnership will assess the success of a project
- How new partners can be added to the partnership
- Signatures of primary contacts



### Organizational Responsibility Chart 1

It can be very helpful to a partnership to have documents that outline all organizational resources that are able to be committed to the joint task. Having such a tool can be used as a reference guide when planning events and can help all partners remember what they promised to the project at the beginning. This tool can also help a partnership ensure that all resources needed are provided, and that all are receiving the training that is needed. Also, all contact information can be in one place, assisting with quicker and easier communication between partners.

Partner Organizations	Contributions	Languages	Training	Contact Information
Public Library	Space, copier		12 librarians need training	
Catholic Charities	Staff, laptops, materials	Spanish, Creole	1 trainer	
Islamic Community Center	Volunteers	Arabic	22 volunteers need training	
Local AILA chapter	Trainers, Quality control	Spanish	1 trainer, 15 <i>pro bono</i> attorneys	
Café Versailles	Breakfast	N/A	N/A	
High School	Lunch – free for staff and volunteers (fundraiser for applicants)	N/A	N/A	



## Organizational Responsibility Chart 2

It is helpful to delineate partnership responsibilities so that efforts are not duplicated. Establishing up front which agency will offer what services to the public can ensure that agencies are not competing for the same clients. Also, the partnership will present a holistic, coordinated and organized front to the community that will be reflected in its division of labor and service delivery model.

The below chart is an example of the work division that a collaborative of organizations created regarding provision of immigration legal services. This type of chart could be used with any type of partnership arrangement.

