



Partnering Practice Guide for Waitakere





Project Twin Streams community planting day.



Partnering with neighbourhoods to support the Green Network.

This partnering practice guide has been developed to support and sit alongside Waitakere City Council's Partnering Policy. It brings together a more in depth discussion of partnering and some helpful partnering tools, resources and tips.

Success of the Council as a partnering organisation is dependent upon the knowledge, know-how, systems and supports for both elected members and staff who are at the coal face of relationships and partnering endeavours. In acknowledging that partnering is an art rather than a science, this guide should be seen as a tool book rather than a rule book.

The practice of partnering is an ever-evolving state. The guide is a 'living document' – one that can be added to over time as new ideas, processes and resources are developed. To date, much of Waitakere City Council's experience in partnering has been developed from 'doing' and this is expected to continue. However, growing and enhancing partnering capacity and practice at an organisational level is essential to enable the hopes and aspirations of the Partnering Policy to be achieved.

Cover image: Waitakere residents and community groups support the "Waitakere Way" of working together.

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Section One: Waitakere Partnering Continuum



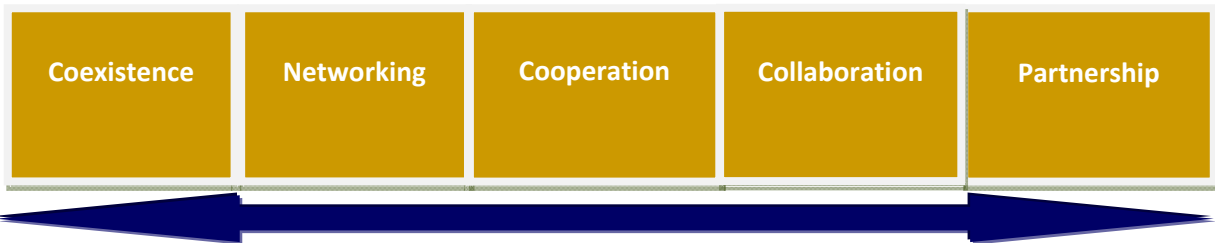
Council and EcoMatters Environment Trust sign first partnering agreement.



Community hub partners engage with Ranui Caravan Park residents.

As part of the Strengthening Communities through Local Partnerships Research project in 2002, a group of Council staff got together to talk about how to define 'partnership.' Not able to easily come to a single definition, staff began to explore the concept of a continuum – a way to describe and express ways of working that involved different degrees of relationship commitment and expectation. While there are now a number of similar continuums in existence, the Waitakere Partnering Continuum below was 'locally' grown and has proved effective in assisting thinking about what it means to partner, not just in Waitakere but nationally.

Waitakere Partnering Continuum



Shared: goals, power, resources, risks, successes, accountabilities etc.

Section One: Waitakere Partnering Continuum CONTINUED

WHAT ARE THE KEY INGREDIENTS?

Co-Existence

- Know about each other but don't need to come together
- No direct relationships with other agencies
- No dependency or need to collaborate

Networking

- Informal discussions
- Information sharing is the basis
- No formal collective agreement on visions, tasks etc
- Lower level of co-operation
- Not about shared decision making
- Establishing and maintaining relationships
- About knowing and understanding who's doing what

Co-operation

- Lower level of collaboration
- No fixed term long term relationship implied
- Acknowledgement of common issues/interests/agendas
- May involve helping another organisation to achieve their project/task etc
- May involve documentation such as a Memorandum of Understanding (MOU) that notes what will be worked on together
- No ongoing or formal commitment to each other

Collaboration

- Has trust implicit
- Is based on negotiated and agreed actions
- Don't **have** to share same base values but have an agreed set of principles for working together

- Has shared decision making
- Means giving up some things (i.e. power and control)
- Provides an opportunity to add value to others as well as yourself
- Sometimes documentation is prepared to support different types of collaborative effort

Partnership

- Emotional/spiritual awareness of each other; that is, involves hearts, minds, passion
- Work from an agreed shared values base e.g. trust, honesty, openness etc
- Sharing:
 - Risks and rewards
 - Resources
 - Accountability
 - Visions and ideas
 - Decision making
- Has a degree of formality and two/multi-way contractual and relational obligations
- Processes, systems and mechanisms are co-created to support the partnership, e.g. structures, contracts, principles and visions, plans, conflict resolution etc
- About shared power but not 50/50 notion of equality
- About the way things are done rather than the evenness (or not!) of power, control and resources
- Resourcing/contributions about equitable rather than equal contributions; they may be in kind as well as monetary

*From "The Potential of Partnership",
Craig and Courtney 2004, pages 38-9*

Section One: Waitakere Partnering Continuum CONTINUED

WHAT ABOUT THOSE NOT YET ON THE CONTINUUM?

You may also come across organisations who you'd like to be partnering with but who aren't yet on the partnering continuum. You might like to think about why that is? It may be because of:

historical conflict – they may have had bad experience of working together/with Council, there's probably low levels of trust, sometimes personality disputes, and real or perceived differences in values etc.

competition – not working with others is a deliberate strategy. Some organisations see no benefit in collective working arrangements and/or prefer to compete rather than work together.

ignorance – organisations who have been working on their own for a long time may not consciously think about the benefits of working with others or how they might begin partnering.

resource constraints – despite a willingness there maybe little time and financial resource available to invest in exploring and building relationships and potential collaboration opportunities.

disabling barriers – recognising that while we share different "environments" during our daily life – built environments, communication environments, service environments, and so forth – access to these environments is not equally shared. Disabling barriers are features that prevent some people fairly accessing and using those environments – for example, buildings which just have steps,

information provided only in small written English, or services that assumes everyone has the same needs and strengths.

Once you've gathered more knowledge about the possible barriers to partnering participation, you'll be in a much better position to devise some potential change making strategies. What follows below are some things to consider in working out what your next move might be:

- building relationships and investing energy and time with the other organisation to encourage thinking about other potential ways of working
- being aware of the 'politics' and who might be your best 'bridge builders' to discuss and negotiate on your behalf
- finding the right incentives and pitch: what's in it for them, as well as Council
- providing resources up front to enable organisations/key individuals to participate in collaboration processes
- reflecting on **how** you/the Council is communicating and engaging and whether there may be barriers to partnering that you hadn't seen or acknowledged before
- where barriers do exist for some organisations, helping broker access to other potential partner agencies and broader partnering networks.

Section One: Waitakere Partnering Continuum CONTINUED



Ten year Safe Waitakere Celebration.



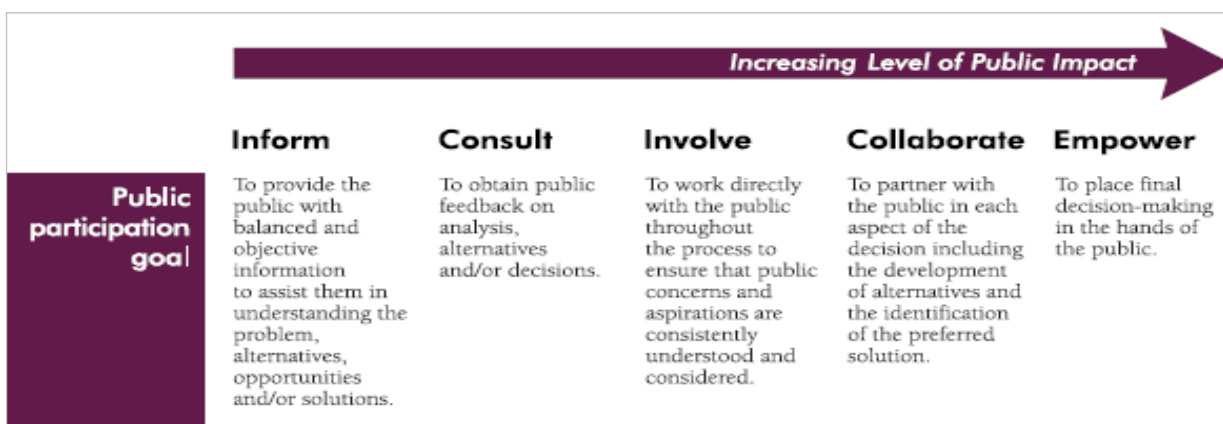
Signing of 2009 Safe Communities Agreement.

PARTNERING CONTINUUM AND IAP2 SPECTRUM OF PUBLIC PARTICIPATION

As noted earlier, there are a number of different continuums in use and sometimes it can get a little confusing. Within the Council another related, yet different continuum you may come across is the International Association for Public Participation (IAP2) Spectrum of Public Participation.

This spectrum focuses on different levels of community participation in decision making. IAP2 encourages those involved in communication and consultation processes to engage with the public (and all stakeholders) in creative, honest and meaningful ways. They have also developed set of core values to guide decision makers “make better decisions which reflect the interests and concerns of potentially affected people and entities”.

For more see:
<http://www.iap2.org/displaycommon.cfm?an=4>



IAP2 Spectrum of Public Participation

Section Two: When to Partner and Not to Partner

At the collaboration and partnership end of the continuum partnering becomes more difficult and multi-layered. This is due to a number of factors that may include some (or all!) of the following:

- the number of players wanting to work together
- finding common ground (overlapping visions and goals) across a diverse and sometimes conflicting range of agendas, ideas and ways of working
- having time to develop respectful relationships and trust
- finding best ways to meaningfully share power and resources
- managing expectations about what can realistically be achieved
- having resources and time to develop agreements, structures and processes required to enable a firm foundation for the shared partnering journey ahead.

Clearly then, the Council needs to be selective in when and how it decides to partner. Decisions must be made on a case by case basis, with Council needing to be clear about what it is seeking to achieve and what this implies for whether it works with others, or journeys alone at each particular time.

Being clear also means being honest and realistic about the opportunities and constraints for Council in each given situation. Commitments to collaboration and partnership should only be made when the Council realistically has the time, capacity and political/organisational backing for a long term journey.

Partnering: Organisational Rewards

- Professional development for key staff
- Better access to information, ideas and resources
- Greater innovation
- Enhanced credibility
- Operational efficiencies
- More tailored services

The benefits and rewards from working in collaboration/partnership arrangements need to outweigh the costs and relative risks.

DECISION TIME – TO PARTNER OR NOT TO PARTNER

In broad terms, what follows below are some key factors to consider as part of the partnering decision making process. If upon consideration of the following criteria, you find yourself with significantly more 'yes' answers than no, this should probably guide you towards an initial positive partnering decision.

“Yes “

- The Council can't achieve what it wants to on its own.
- The problem the Council is seeking to address is complex (see next page “What about maybe?”)
- Others can add significant¹ value to help the Council achieve its goals: they may bring other skill-sets, ownership, mana, resources, assets, operational efficiencies etc.
- The Council is willing to help others achieve some of their goals.
- The Council is willing to share power, decision making and accountability for shared outcomes.
- The Council is committed to a long term approach and ongoing relationships.
- There is time to enable partnering processes, structures and work programmes to be developed and implemented.
- There is flexibility as to how goals are reached.
- The Council is prepared to take risk.

It is important to note that those, whom the Council is working with, must be able to answer YES to all or most of these questions too! Taking time to talk things through together at the onset may save some un-anticipated grief later.

¹While collaboration and partnering will generally always add value, these approaches are resource intensive and time consuming. This means an objective assessment of the relative 'added value' needs to be made so that resources can be wisely used. If the potential gains from collaboration are not seen as **significant**, then other approaches to achieve outcomes should instead be considered.

Section Two: When to Partner and Not to Partner CONTINUED

“No”

- The Council can actually complete the task/ reach the goal without needing significant help from others.
- Timeframes for achieving goals/key targets are short and/or fixed.
- The Council has a fixed agenda/goals/outputs etc which it is not prepared to deviate from.
- The Council requires certainty and is not prepared to take risks.
- The strategic arm of the Council is ready to creatively partner but the implementation/ political arm of the Council isn't (or vice versa).
- There are others the Council can independently contract to deliver on the task, service or activity, the Council does not actually have to be involved.

Partnering: Organisational Risks

- Reputation
- Loss of autonomy
- Conflicts of interest
- Drain on resources
- Implementation challenges
- Difficult to manage

Co-creating shared visions and ways of working together that are flexible and able to respond to change in ongoing ways are essential for achieving positive community change. So on balance, the decision on whether to not to partner probably actually comes down to a few further, more specific criteria. This acknowledges that while the 'right answer' may be that we need to partner, as practitioners we need to carefully think about whether we have the following in place to effectively collaborate or be working in partnership with others right now:

- political and organisational commitment
- resourcing and capacity to invest in relationships and collaboration processes
- the right partners with the right people ready to work with us
- the ability to take risks together
- high levels of trust
- passion, energy and commitment to achieving shared visions and goals.

Proactively thinking about these aspects ahead of time, means that you can intentionally focus additional energy and attention on the areas that require most work. Being conscious and strategic in your decision making processes however is the best place to start your partnering journey.

For those seeking more specific guidance, Vic Health has produced a very useful Partnerships Analysis Tool. The first three sections of their checklist are worthwhile testing your 'gut' feeling on the potential for meaningful partnership see <http://www.vichealth.vic.gov.au/~media/ResourceCentre/PublicationsandResources/General/VHP%20part%20toolow%20res.ashx>

WHAT ABOUT MAYBE?

Given that partnering is an art not a science, things aren't as black and white as they may first appear. Judgement calls will always need to be made when it comes to decision making on partnering.

The reality is that many of the complex issues the City faces - like poverty², family violence, local economic development and climate change - have no easy solutions. Furthermore, achieving Waitakere's locally identified Community Outcomes³ will be dependent upon working together across boundaries and sectors and communities.

Simple, Complicated and Complex Issues

Simple issues – there's broad general agreement on the issue and how to address it, with the same 'generic solution' applied many times over with a high degree of certainty (e.g. baking a cake by following a recipe).

Complicated issues - solutions can be found with some specialist technical assistance (e.g. Nasa scientists flying to the moon).

Complex issues - outcomes are far less certain, as is the agreed pathway to success. (eg. raising a child – no two are the same and strategies for your first child guarantee no success of automatically working for your second or subsequent children!)

²To hear Mark Cabaj from Tamarack explain why poverty is a complex issue and what this means for collaboration go to http://tamarackcommunity.ca/g3s61_VC_2009f.html

³See : <http://www.waitakere.govt.nz/abtcnl/pp/lccp/pdf/CommOutcomes-pg3-5.pdf>

Section Three: When to Put Pen to Paper



Green Network Sustainable Neighbourhoods - Council and residents agree on goals, support and action.

In 2006 and 2007 the Waitakere City Council and Department of Internal Affairs co-sponsored the publication of two resources to assist those putting partnering agreements together. *Putting Pen to Paper* gives helpful advice for those considering when, if and how to document the relationships. See:

[http://www.communityoutcomes.govt.nz/web/coutcomes.nsf/files/pp2p/\\$file/pentopaper.pdf](http://www.communityoutcomes.govt.nz/web/coutcomes.nsf/files/pp2p/$file/pentopaper.pdf)

This was followed by *Putting Pen to Paper: Profiles* which illustrates the process of putting agreements together via eleven case studies from across New Zealand. Two partnering agreements involving Waitakere City Council were included in case studies profiled – the North West Wildlink Accord and the Community Waitakere–Waitakere City Council Partnering Agreement. See:

[http://www.communityoutcomes.govt.nz/web/coutcomes.nsf/files/pp2pnorthwestwildlink/\\$file/northwestwildlinkaccord.pdf](http://www.communityoutcomes.govt.nz/web/coutcomes.nsf/files/pp2pnorthwestwildlink/$file/northwestwildlinkaccord.pdf)

[http://www.communityoutcomes.govt.nz/web/coutcomes.nsf/files/pp2pcommunitywaitakere/\\$file/communitywaitakere.pdf](http://www.communityoutcomes.govt.nz/web/coutcomes.nsf/files/pp2pcommunitywaitakere/$file/communitywaitakere.pdf)

Some form of documentation is critical to most new relationships or projects at some stage – especially where significant funding, broad outcomes, risk and innovation are involved.

Key sections from the *Putting Pen to Paper* documents have been adapted in the section which follows.

The Council may be networking, cooperating and sometimes collaborating with a range of agencies without any type of written agreement to support the partnering activity – especially where agencies/representatives have worked together before and a high degree of trust and shared understanding exists.

Factors to consider in whether or not the Council and its partners should develop formal partnering documentation include:

- the time that developing partnering agreements can take – which can impact on the time and energy available to 'do' things
- the likely duration of the joint project or process e.g. short or long term: the longer term nature of the initiative, the more value in developing written agreements
- the complexity of the task e.g. running a one off forum versus developing a citywide interagency planning process.

Section Three: When to Put Pen to Paper CONTINUED

- history between the parties e.g. if the parties have worked a lot together, developing documentation may be less important than for newly forming relationships
- scale e.g. small local project vs. multi-agency services
- pre-existing legislative frameworks and obligations e.g. most central and local government agencies will require a written agreement of some sort to ensure accountability for public monies
- financial risk e.g. million dollar service contracts compared to a contribution toward a community event or project.
- you know that if key people left, things would just fall over
- dominant personalities or politics may be getting in the way of moving forward together
- things have become very complex and uncertain and the risks for Council in continuing to work in this way are multiplying.

It is generally recognised that putting pen to paper when things have gotten tricky is probably too late. So if you can, think ahead about what might be helpful to safeguard the partnering arrangement and Council's interest, and get a few key things written down at an early stage.

Partnering action can certainly come before written documentation (like a terms of reference or a partnering agreement). However, as people, policies and programmes change, sometimes being "undocumented" can start to feel uncomfortable or "loose". What follows below are some signs to watch out for that may suggest that it is time for the Council to formalise arrangements to document the who, why, what and the how:

- opportunities are being lost because not everyone is on the same page
- the reasons for working together and vision for what was to be achieved are no longer as clear as they once were
- other partners are not:
 - doing what they said they would do
 - or not doing anything at all!
- roles and responsibilities for action are not clear and/or there are no agreed processes or mechanisms for moving forward

In summary then, at either the start of a process or as you're collaborating, there are two useful points to consider in terms of "**when**" to put pen to paper:

1. Can the partners working together do what they hope without any form of documentation?
2. Would the anticipated benefits from putting pen to paper outweigh the likely costs (time, resources, energy) of putting together an agreement – in the short or long term?

After making the decision that it's time to go to paper, the next critical question is what kind of documentation best suits the needs of all partners.

Section Three: When to Put Pen to Paper CONTINUED



Plaque commemorates 10 years as a Safe Community.



NZ Police sign 2009 Safe Communities Agreement.

WHAT KIND OF AGREEMENT?

The Council now has many great examples of different types of partnering agreements and these should become key reference points for those developing new partnering arrangements. See the Council's Strategic Partnering Database for examples of current good practice.

There are a number of different agreement types currently in use that reflect different degrees of partnering intent. The reality is that practical definitions and a continuum of agreements are still very much at the development stage with many of the terms and meanings below used interchangeably. Some common agreement types are:

- **Terms of Reference** – a high level initial framing of why people have come together and what they are hoping to achieve and process for what happens next.
- **Charter/Accord/Heads of Agreement or Engagement** – generally a fairly simple document that records high level commitment to a vision, principles and protocols for working and talking together.
- **Communication Agreement** - generally identifies key contacts for projects that involve two or more agencies and identifies processes for “talking” together on a regular basis.

- **Memorandum of Understanding** – a more traditional term that has been used to capture high level agreement between parties. It has a connotation of being more formal and doesn't have a particularly “warm” or relational feel to it. However, it effectively sets out areas of shared interest and joint activity without necessarily embracing everything that partnering implies.
- **Relational Contract** – a hybrid agreement that includes elements of working together or partnering and a contract for specific services.
- **Partnering Agreement** – at a minimum records agreed visions, principles for working together and jointly agreed actions. Can be used to reflect a wide range of collaborative arrangements.
- **Partnership Agreement** - reflects shared visions, values, processes for decision making along with roles, and responsibilities for action and resourcing etc.

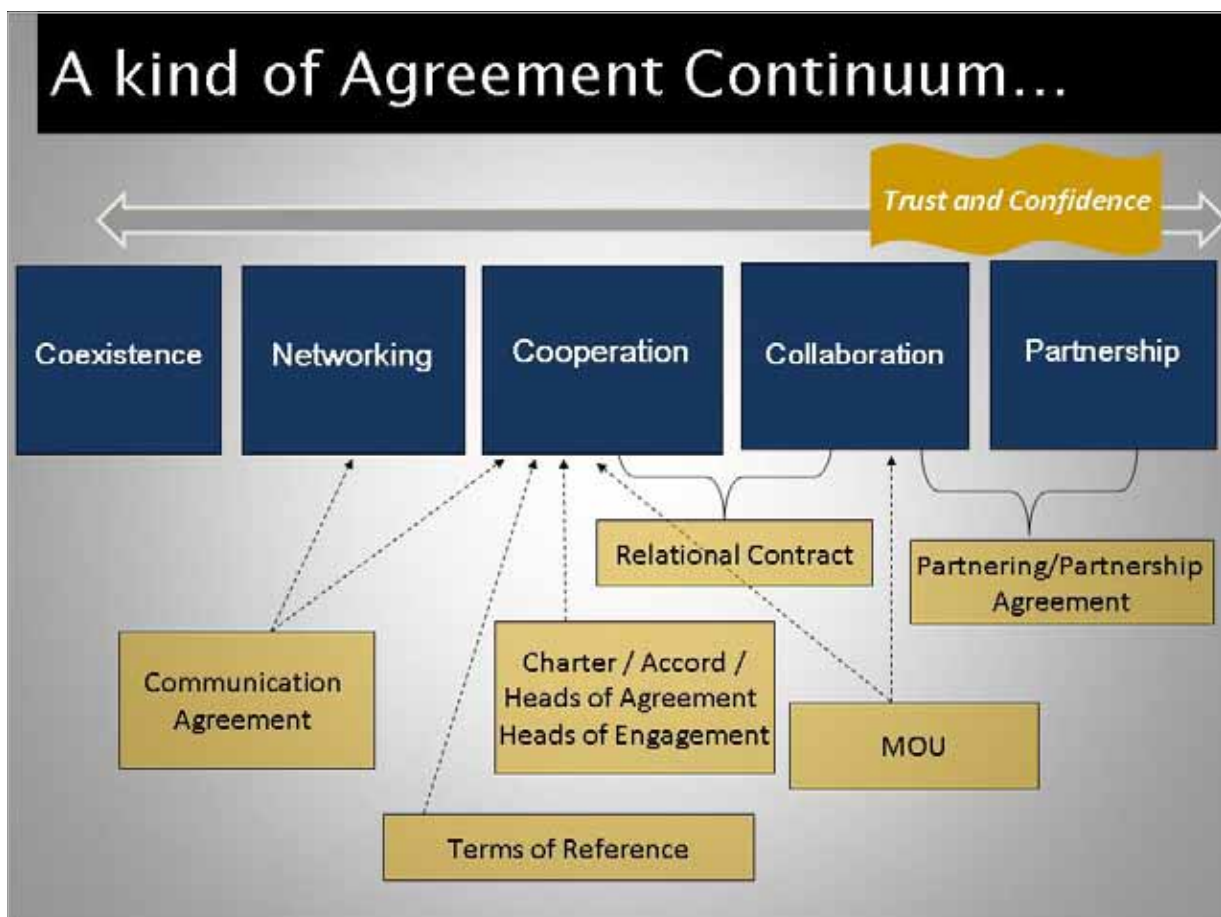
Note: based on a shared set of expected outcomes, content within all the various agreement types above would be mutually negotiated and agreed by all parties. This differs from a traditional contract which is usually tightly defined and specified within a legal framework by the purchasing organisation. Service level specifications, timeframes, relevant performance measures and resourcing requirements tend to be the core focus of the documentation.

Section Three: When to Put Pen to Paper CONTINUED

WHAT KIND OF PARTNERING AGREEMENT SUITS WHAT KIND OF RELATIONSHIP?

As noted above, there are no hard and fast rules that apply as to which agreement types apply when. However, using the partnering continuum as a guide for different kinds of partnering working, the following broad agreement types generally apply to the different

partnering positions. In the future, the Council should increasingly look to develop some common organisational understanding of agreement typology and naming to avoid confusion both to internal and external stakeholders.



Section Four: Relationship Management

Having individuals within the Council designated to manage specific relationships and partnering arrangements is essential. The Council's partners see their relationship manager as their valued 'go to' person, someone who enables a pathway into the organisation and someone who can help navigate, champion, negotiate and translate on their behalf.

Relationship managers should be seen as facilitators and brokers rather than relationship gatekeepers. While they may maintain an oversight over many different relationships a partner has within the Council, they will not always be directly involved in day to day programme or service level detail. Effective relationship managers will:

- **Open Doors** - facilitating introductions to others in Council who can assist the partner and/or help achieve the joint partnering vision
- **Skilfully Navigate** - helping partners to understand the 'puzzle factory' of the Council, how the Council works, what the right processes are for getting things done etc
- **Build Bridges** - broker conversations/ meetings/assistance that may be required to help resolve difficult issues that arise
- **Proactively Communicate** - checking in with partners on how things are going, provide updates on key changes within the Council/in Council policy etc, signal upcoming requirements upon partners time e.g. 10 year plan consultation, attendance at Community Board meetings etc, and find practical ways of describing partnering and demonstrating the achievements (big and small) of each partnering arrangement
- **Work Inclusively** - making useful linkages to other parties or related partnering arrangements to help communicate and support cross collaborative ways of working and thinking
- **Spot Opportunities** - always be looking to creatively add value to relationship and partnering arrangements

- **Make things Happen** - talking and doing with integrity, delivering on what's expected by the Council and its partners.

Given that the Council is a large organisation, responsibilities for relationship management need to be made clear, both in terms of partnering documentation and in role/job descriptions so that performance can be suitably supported, managed and rewarded. As noted above, effective relationship managers will need to establish and maintain a wide range of related sector relationships, knowledge and connections so that where required they can:

- support, influence and advocate for Council/their partner's position in an informed way
- input meaningfully into relevant policy development (Council or external)
- be objective and hold the 'middle' space.

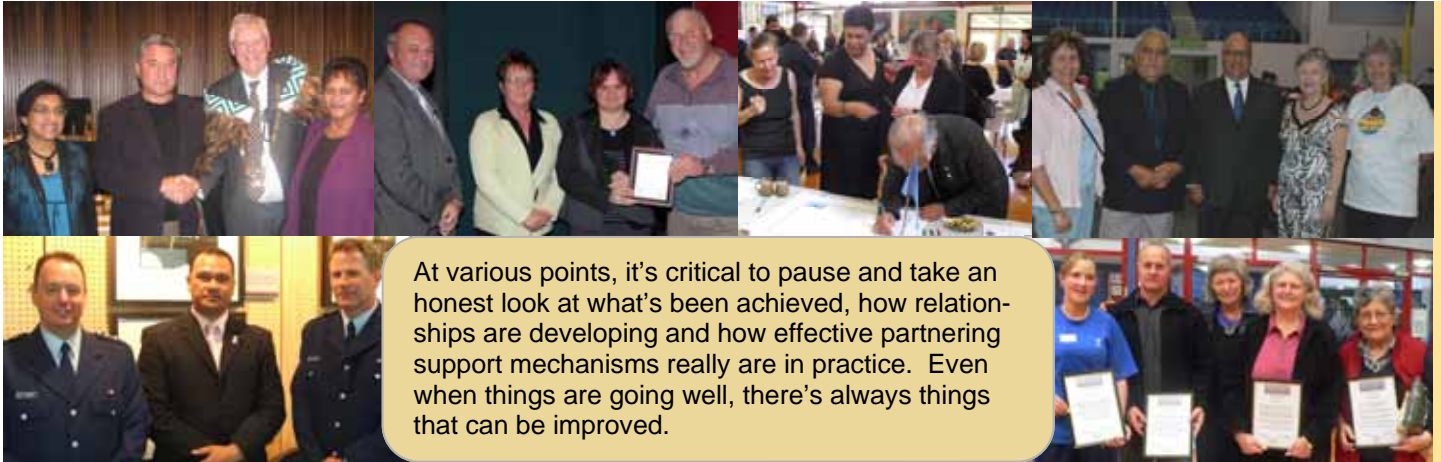
EVERYONE IS A POTENTIAL PARTNERING BROKER!

While designated relationship managers may have key responsibilities for helping guide, shape and deliver specific Council related partnering arrangements, they are not the only ones who play key partnering roles within the Council. A large number of other staff are brokers and enablers of collaborative relationships and working together both internally and externally. As a partnering organisation, it's important the Council helps promote and support the development of partnering skillsets across the organisation. [For more information on partnering training opportunities contact Human Resources].

There are a number of excellent partnering broker toolkits that you will find lots of helpful information in too. Try:

http://thepartneringinitiative.org/publications/Toolbooks/The_Brokering_Guidebook.jsp

Section Five: Health Check Time



At various points, it's critical to pause and take an honest look at what's been achieved, how relationships are developing and how effective partnering support mechanisms really are in practice. Even when things are going well, there's always things that can be improved.

Sometimes it is useful for reviews and evaluations of partnering arrangements to be undertaken by neutral third parties – especially at the end of fixed term arrangements, or in times of concern/frustration as to why things aren't being achieved in the way that was anticipated. However, there are a lot partners can do themselves by strategically and proactively building in informal six monthly or annual reviews.

There are many potential review tools and checklists that have been developed to assist in internal review processes to encourage partners to look more deeply at what's happening, why, and what could be done to make partnering arrangements work even better. Before deciding on a set of benchmarks to use, talk with those you're working with to get agreement on the review process. See the measures included in the Smarter Partnerships Checklist which follows on pages 16-20 as a starting point – not all will be relevant, experiment a little and adapt things to best suit where the partnering arrangement is at.

Smarter Partnerships – digging deeper, finding answers ...reviewing your partnerships and making them work better. This tool has been borrowed and adapted from www.lgpartnerships.com

This tool comes from the basis that for partnerships to be effective there needs to be:

1. **Leadership** – where partners share a vision and harness their energies to achieve more than they could on their own.
2. **Trust** – where partners are mutually accountable, share risks and rewards fairly, and support each other.
3. **Learning** – where partners continuously seek to improve what they do in partnership.
4. **Empowerment** – where partners are encouraged to innovate, work inclusively and build capacity to enable long term sustainability.
5. **Managing for Partnering Performance** – where partners put in place necessary practices and resources and manage effectively any changes needed.

What follows next are some helpful checklists to get you and your partners thinking about how things are going and what improvements could be made to strengthen both relationships and anticipated partnering outcomes.

At www.lgpartnerships.com you can get further information on what the benchmarks mean, how to assess your results and possible actions you could think about taking next...

Section Five: Health Check Time CONTINUED

LEADERSHIP

...where partners have a common vision and harness their energies to achieve more than they could on their own.



	Benchmark	NO – action needed (v)	NO – but action in hand (v)	YES – but needs improving (v)	YES – working well (v)	Action needed	By whom
1.1	Partners share a common vision of the difference they want to make and the direction to take.						
1.2	Partners focus on partnership added value : how they can achieve more or better results through partnering.						
1.3	Partners are willing to make changes to achieve shared goals.						
1.4	Leaders facilitate authentic collaborative working and engender support within their own organisation.						
1.5	Partner objectives are aligned in a common direction.						

Section Five: Health Check Time CONTINUED

TRUST

...where partners are mutually accountable, share risks and rewards fairly, and support each other.



	Benchmark	NO – action needed (v)	NO – but action in hand (v)	YES – but needs improving (v)	YES – working well (v)	Action needed	By whom
2.1	Partners are mutually accountable for their contributions, sharing responsibility for the success of the partnering arrangement.						
2.2	Partners understand and respect differences amongst partners.						
2.3	Partners behave openly and deal with conflict and frustration promptly.						
2.4	Communications are sufficient and effective .						
2.5	Partners have an equal say in decision making and it feels like power is equally shared.						

Section Five: Health Check Time CONTINUED

LEARNING

.....where partners continuously seek to improve what they do through their relationships and working together.



	Benchmark	NO – action needed (v)	NO – but action in hand (v)	YES – but needs improving (v)	YES – working well (v)	Action needed	By whom
3.1	Partners continuously seek improvements in activities and ways of working.						
3.2	Partners periodically review how we're going: our vision, achievements and how it's working.						
3.3	Partners seek to learn from each other and from experience elsewhere.						
3.4	Partners recognise and use the strengths and talents that lie within.						
3.5	Partners manage the changes needed for improvements to be made.						

Section Five: Health Check Time CONTINUED

MANAGING FOR PARTNERING PERFORMANCE

...where partners put in place necessary practices and resources and manage effectively any changes needed.



	Benchmark	NO – action needed (v)	NO – but action in hand (v)	YES – but needs improving (v)	YES – working well (v)	Action needed	By whom
4.1	Our partnership agreement still accurately reflects the visions, aims and intent of our partnership.						
4.2	As partners we feel valued and that our partners uphold the principles for working together we agreed.						
4.3	Partner roles, responsibilities & contributions are clearly defined and accepted.						
4.4	Objectives, targets and milestones are set and owned by those responsible.						
4.5	Adequate resources are devoted to achieving partnership goals.						

Section Five: Health Check Time CONTINUED

EMPOWERMENT

...where partners are encouraged to innovate, work inclusively with others and build capacity to enable long term sustainability.



	Benchmark	NO – action needed (v)	NO – but action in hand (v)	YES – but needs improving (v)	YES – working well (v)	Action needed	By whom
5.1	We are always looking for new and different ways of doing things.						
5.2	We continue to welcome and work with others who share our passion.						
5.3	Others would perceive us to work inclusively and be open to new ideas.						
5.4	We are thinking & working today in ways that will support our sustainability in the longer term.						

Section Six: Succession Planning

The greatest risk to partnering is staff turn over. When people in key partnering positions leave, they take both institutional knowledge and relationships with them. For partner organisations, losing their Council relationship champion often brings disappointment, anger and frustration as the time investment they made in that person must be repeated 'all over again'. Given that it is people that make partnering happen, proactive planning around key 'people' transitions is essential. Good and thoughtful planning means thinking not just about 'what' gets handed over but how, and by who.

Where possible some planned 'overlap' time should be planned to enable relationships, historical context and knowledge to be 'handed over'. New staff can 'shadow' those they will shortly replace. While some aspects may be able to be communicated in written reports, nothing beats a 'face to face' transition time which allows questions to be asked (and answered) and personal introductions to key internal and external partners made.

Where possible, it also significantly helps if the new relationship manager can have continued access to their predecessor (or someone in the organisation with a high level of detailed institutional knowledge about the relationship) for an initial period of time. The ability to make a quick phone call to check something out over the first six months can make a significant difference to smooth, successful relationship transfers. While some knowledge of existing/historical trouble spots is useful, it is important for new relationship managers to go into their role with an open heart and willing mind, respectfully giving space for new relationships to develop.

For those about to exit relationship management roles, it is advisable to provide your successor with the following:

- a potted summary of the partnering arrangement, including brief history, key milestones, timeline etc
- copies of previous agreements and relationship/performance reviews
- an outline of relationship management processes currently in place e.g. who meets with who and how often, scan of other key internal contacts/relationships in place, elected member roles, communication and reporting processes
- a brief summary of what's currently underway and planned for next 12 months - so the latter can become an initial timeline of expected trigger points

It is best to keep the material outlined above as concise and focused as you can – it's an overview rather than a manual. Having a core of background, future and key contact information in the same document also means it's more likely to be both found, and used.

Refer to the handover template (pages 22-23).

Section Six: Succession Planning

RELATIONSHIP HAND-OVER TEMPLATE

So you're leaving soon. Remember how hard it is starting out? Check out the headings below and take some time to pull together key information about the partnering arrangement you've been leading to help inform and guide your successor. By putting it all in one place, there's a better chance it won't get lost in the reading pile, and it will provide an essential big picture scan of everything the new "you" needs to know from day one.

So, be brief - focus on the overview not the detail. The next person in your shoes will really thank you for taking the time to do this.

Note: don't be limited by the bullet points, think about what you REALLY need to know to do your job well. Feel free to attach any relevant documents, reports, agreements at the end too.

Partnering Arrangement:

Relationship Broker:

Date:

Contact Info for People and Organisations Key to this Partnering Arrangement

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Potted Summary of Partnering Arrangement	Comments
How things got started?	
Timeline of key events and milestones?	
Any big changes in Council's role along the way?	
Any huge trouble spots/conflicts to be aware of?	
Any comments on how these were handled/successfully mitigated previously?	

Section Six: Succession Planning

RELATIONSHIP HANDOVER TEMPLATE

Relationship Management Processes Currently in Place	Comments
Who meets with who and how often? Politician/staff responsibilities for relationship management Communication and reporting processes Key internal relationships within Council Agreements: what's in place, when is it due to be reviewed etc. (ATTACH COPIES IF POSSIBLE)	

Currently Underway and Planned for next 12 months	Comments
Key events, activities, conversations, work programme initiatives currently underway that your replacement needs to know about or be involved with? Key third party relationships/other related funding arrangements Timeline of key dates and activities Top tips or things to watch out for....	

You might like to Attach:

- Agreements
- Key Council Reports
- Evaluation
- File directory Guide: where and how you've stored key project/partnering information...



Section 7: Moving On



An eco city partnership between residents and businesses in action.



Michael Jones, a lucky shopper and Cr Brady on Bags Not Launch Day.

Partnering initiatives most frequently come to an end because the project or goal that brought partners together has been completed. There are many other wide ranging factors that can bring things to an unintended end, including:

- Resourcing constraints
- Personality conflicts
- Loss of key partnering champions who held things together and/or made things happen
- Outcomes the partners were seeking are no longer as pressing or relevant
- The willingness, energy, commitment or capacity of partners round the table to work together may not be as strong as it was when thing got started
- Implementation issues e.g. continued inability to deliver on agreed commitments, other gatekeepers/blockers preventing new ways of working, flawed models and structures, resistance from parties external to the partnership

- Changes in broader external environment e.g. change of policy, priorities or political direction, natural disasters, recession, etc.

Whether the driver is completion, inactivity, un-resolvable conflict or un-anticipated change, honest and constructive conversations about next steps need to be built into partnering arrangements and be in the active consciousness of partnering practitioners.

“Moving On – Effective Management for Partnership Transitions, Transformations and Exits”. See <http://www.iblf.org/docs/tpi/MovingOnToolbook.pdf> which provides useful information on how to encourage the moving on conversation.

Section 7: Moving On CONTINUED

TOOL 1 PROMPTS FOR A MOVING ON CONVERSATION

<p>GROUND RULES FOR 1-2-1 CONVERSATIONS</p>	<ul style="list-style-type: none"> • Choose your timing well – is this the best moment for such a conversation? • Decide who would be the best person with whom to discuss the issue (not necessarily the most obvious one – such as the broker) • Set the scene – explain your perspective and what is prompting this conversation • Present your opening statement or question objectively – take care that the person you are talking to does not take your remarks personally • Refer to the history of the partnership and present your questions / views in the context of the relationship and the partnership's goal and objectives • Invite early responses – don't try and push the conversation too far too fast • Adjust your position and approach in light of the response you get – make sure it is a genuine conversation, not a monologue • Ask the person you are talking with to suggest ways of taking the conversation further and in what timeframe.
<p>HANDLING GROUP CONVERSATIONS</p>	<p>It is a good idea to focus on forward-looking issues and to ask open questions that will encourage wide-ranging answers and positive contributions. These could include questions like:</p> <ul style="list-style-type: none"> • What do you / we think are the most important elements of this partnership and how can they be protected / enhanced? • What are you / we most proud of in the partnership's achievements so far and how can these things inform our moving on decisions? • What kind of potential moving on options do you / we think there are and how can we explore each of these to arrive at the best one for all concerned? • How will our colleagues (in the different partner organisations) and other stakeholders understand / react to our moving on decisions and how can we check out their views? • Is there a need to make a decision? If so, is this 'non-negotiable'? Is there a specific deadline for the decision and its implementation and do we agree / accept this? • What more do we need to know to inform our decision(s)? How will we find these things out and share them with the group? • How will we take this conversation further? Who else may need to be consulted / involved? <p>To keep the conversation lively, open-ended and constructive, it may be worthwhile to hold a workshop in which the partners – and other key stakeholders if necessary – can do some 'option mapping' or 'scenario planning' probably with a facilitator drawn from the group or brought in from outside the partnership specifically for the purpose.</p>
<p>NAVIGATING THE CONVERSATION</p>	<p>A moving on conversation can be planned or it can simply arise naturally. In either case, usually it is a topic that needs to be handled with care for a number of reasons:</p> <ul style="list-style-type: none"> • Individuals may be reluctant to reveal too much about their wishes or plans, there may be a level of 'sitting on the fence' until the views of others are clearer • If the conversation has been planned and introduced by one partner, they will need to be careful not to force the pace or push their own view too strongly so as to avoid other partners feeling resentful...especially if the initiating partner is the one providing a substantial amount of resource • Some partners may be representing a 'non-negotiable' position on behalf of their organisation (eg a fixed deadline for needing to move on from the partnership) so it would be desirable for partners to know this early in order to avoid spending time debating something that cannot change • Some may feel isolated from the rest of the group because they have a very different

Section 7: Moving On CONTINUED

<p>NAVIGATING THE CONVERSATION <i>continued</i></p>	<p>perspective and this can begin to undermine an otherwise good working relationship so it is important to ensure every partner has an opportunity to present their situation or views. Others may feel that deals have been done behind the scenes and feel excluded</p> <ul style="list-style-type: none"> • Several of the individuals involved may feel quite emotional about the moving on issue – having formed a real attachment to the other partners and / or to the project so it is important to acknowledge that moving on involves emotions as well as practicalities. <p>Navigating moving on conversations requires as much tact and sensitivity as is needed in the early relationship-building phase of a partnership – perhaps even more. This includes being genuinely interested in the perspective of others, listening well to their ideas and concerns as well as being prepared to re-think your own views.</p> <p>Sometimes the conversation can be productive and rapidly reach conclusions that are satisfactory to all – though these will need checking out more thoroughly within each partner organisation. Sometimes the conversation may cause dissent and fragmentation – in which case it is advisable to agree to meet again at a later stage, perhaps allocating tasks (for example, further information gathering) or suggesting sub-conversations on a specific topic prior to the next meeting. Sometimes just with a bit of breathing space, some difficult issues will resolve themselves or partners will return to the table bringing with them some new solutions.</p>
<p>THE CONVERSATION ENVIRONMENT</p>	<p>If you are initiating an important conversation on this topic – at whatever stage in the partnering cycle and whether with an individual or a group of partners – it is important to choose a congenial environment and think carefully about the approach. Perhaps the first discussions need to take place over a meal or a drink, whilst taking a walk or during a project visit.</p> <p>Once the partners are ready to work out the moving on process, it is a good idea to locate a meeting place for this conversation away from day-to-day distractions. A setting which is peaceful and where those involved feel at ease in an informal atmosphere can make a real difference by providing an appropriate backdrop for reflection. The intention is to provide a sense of 'time out' and an opportunity to discuss views relatively objectively.</p> <p>In general terms, a space that is noisy, claustrophobic and / or cluttered will have an immediate impact on everyone – although some will be more conscious than others that this is the case. Little details demonstrating that care has been taken will set a good tone for the conversation's starting point.</p> <p>It may not seem obvious that rooms / environments have significant influence on conversations but they do. And a conversation about moving on may be a particularly sensitive one so you need all the help from the surrounding environment that you can muster!</p>
<p>RECORDING THE CONVERSATION</p>	<p>Finding a way to capture moving on decisions is important so that all the key players agree with what has been decided and feel that they have the clarity necessary to take the decisions back into their own organisations or to other stakeholders. This will help reduce the risk of several different versions of the moving on conversation causing confusion (at best) and relationship breakdown (at worst) either within or beyond the partnership.</p>

Council Services Contact Details



Massey Matters engage residents on a vision.



Pacifica Living Arts Event.

ON LINE

www.waitakere.govt.nz

Email: Waitakere@waitakere.govt.nz

CUSTOMER SERVICES CALL CENTRE

All enquiries - 24 hours, 7 days per week

Telephone (09) 839 0400

WAITAKERE CENTRAL

8 am - 5 pm, Monday to Friday

6 Henderson Valley Road

Henderson 0612

Waitakere

Telephone (09) 836 8000 (This is also the prime contact number, should you know the extension number of the person you need to speak to.)

Facsimile (09) 836 8001

Image back cover:

A cultural group from Rutherford High School take part in the opening of the joint Unitec-Waitakere City Council library complex, Henderson CBD.

Partnering Practice Guide for Waitakere

DECEMBER 2009

