

# **Strategic Partnering: A Guide to the Conceptual Framework**

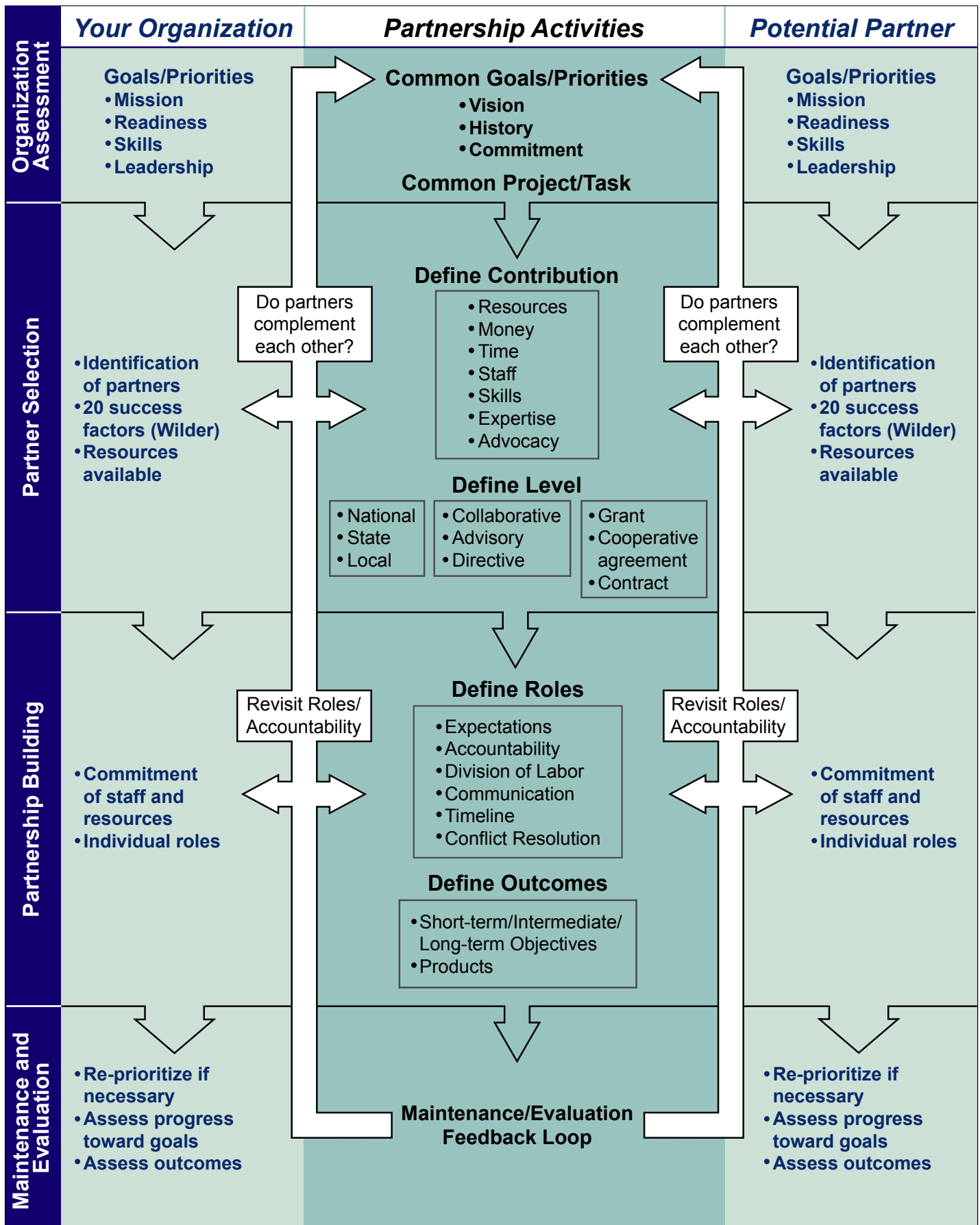
## ***How to use the Strategic Partnering Framework***

The Strategic Partnering Framework is intended to be a guide to the process of forming and maintaining strategic partnerships in public health. The approach is comprehensive - beginning before a partnership is established with organizational self-assessment, and progressing through the process of building and maintaining a partnership, with evaluation and reassessment integrated throughout the entire process. The framework is designed for use at any level of partnership - national, state, or local - and in any size partnership, from single partner to coalition. It can also be applied at any stage of the partnership process, whether an organization is just thinking about partnering, or is part of a mature, well-established partnership.

The far left side of the framework depicts the process within the individual convening organization, while the far right side depicts the same process within the partner organization(s). The center section represents the steps to be taken jointly and the common criteria to be examined by all partners during each phase in the partnership development process. The framework reads from top to bottom, as individual organizations and the partnership progress through the phases of Organizational Assessment, Partner Selection, Partnership Building, and Maintenance and Evaluation.

The Maintenance and Evaluation phase incorporates a feedback loop, which directs users to reassess criteria in each of the previous phases, including revisiting roles and accountability, re-evaluating reasons for partnering, and monitoring progress toward mutual goals. This feedback loop allows for the partnership process to return to any of the steps at any point in time and provides for continuous evaluation of the fit of the partnership.

# Strategic Partnering: Conceptual Framework



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# **Strategic Partnering: Assessment Criteria**

## *Organizational Assessment*

- Know your personal /organizational goals
- Know your organizational mission
- Determine your organizational and project-specific priorities
- Determine your readiness to partner, in terms of staff, resources, time, skill, expertise
- Assess your organizational leadership
- Identify key individuals within your organization to participate/contribute
- Know your organizational limitations

## *Partner Selection*

- Determine your common goals or mission
- Determine whether you have a ‘shared’ vision – and if not, do you each have separate goals that would be individually furthered by the partnership?
- Evaluate your previous history, if any, with the other organization(s)
- Draft and come to consensus about a mutual mission statement, if appropriate
- Articulate a common project/task/reason for partnering
- Agree upon the level and type of partnership (formal, informal, one time, long term). See resource list for further information on partnership levels
- Determine the types of resources that each group brings
- Determine what you can offer the other organization
- Assess whether the other group has skills, resources, \$, time, expertise, credibility, name recognition, advocacy capabilities that you need/want?
- Determine the mutual benefits
- Agree upon the level of commitment of each partner (see building partnership resources)
- Confirm that there is mutual respect and trust between the partners
- Confirm that there is no conflict of interest, either within or between organizations
- Identify any risks or legal issues to be addressed
- Confirm that the partnership represents an appropriate cross section of members (e.g., that it represents different segments of the community – particularly important in coalition building, larger partnerships)
- Confirm that the partnership has a unique purpose that is not met by the individual organizations

## *Partnership Building*

- Agree upon division of labor and workload distribution
- Agree upon a system of accountability
- Decide on means/frequency of communication. Make communication frequent/open/honest – frequency should depend upon level and type of partnership

- Establish a time frame for completion of the project and for the partnership itself if relevant
- Decide on a process for conflict resolution if necessary
- Define short-term, intermediate and long-term goals and objectives
- Define measurable indicators for each objective
- Describe any intended products or deliverables
- Determine the frequency of reporting on the project
- Determine process for adding/admitting new partner (s)

## ***Maintenance and Evaluation***

### **Maintaining a partnership**

- Re-visit accountability often – determine that individuals are contributing and accomplishing what is expected
- Follow up on progress reports as necessary
- Revisit short term, intermediate and long-term goals frequently
- Revisit measurable outcomes
- Monitor any conflict and resolve issues as they arise
- Assess the structure of partnership – is it working? Is there a more or less formal process needed? Do you need to re-establish the formality of the process?
- Promote capacity to establish/sustain/change an existing working framework
- Promote transparency in decision-making
- Be an ACTIVE listener

### **Evaluating a partnership**

- Assess the measurable outcomes – what have you accomplished? How much? How well?
- Share findings. Are you sharing often enough? Is there collective learning?
- Assess progress toward goals - Are you achieving your short term, intermediate and or long-term goals?
- If these goals are not being met – do you need to re-assess the outcomes, priorities, and division of labor between groups?
- Revisit expectations frequently
- Revisit collective and individual missions. Have they changed? If so, how does it affect the partnership? How will you adapt?

Utilize Maintenance/Evaluation Feedback Loop: Return to any step in the partnership process. This can lead to the starting a new project, or deciding to dissolve or end the partnership

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