



**Communities Scotland
and The Community Planning Task Force**

Assessment of Partnership Toolkits

Final Report: Volume 2

Summary of Toolkits

February 2003



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Assessment of Partnership Toolkits

1 Introduction

Communities Scotland, in conjunction with The Community Planning Task Force, commissioned a research project to examine partnership toolkits. Such toolkits exist in a number of different formats and have been designed for a variety of purposes. Defining features for toolkits identified in this study were that they should contain more than one tool relevant to partnership assessment or development. More specifically, they offer a number of methods to help partnerships assess their effectiveness and identify areas where they need to improve performance.

The aim of the study was to identify the different toolkits available and provide a central source of toolkits with simple guidance on their application. Particular attention was given to the needs of Community Planning partnerships. In order to assess partnership toolkits, the obvious first step was to build a list of existing toolkits. This was achieved by:

- Contacting Community Planning partnerships to find out which toolkits were already being used
- Desk research including internet search, and exploration of other research findings
- A workshop with Community Planning partners across Scotland to discuss new and existing toolkits
- Telephone interviews with individuals currently involved in creating or developing toolkits relevant to Community Planning.

The emergent list comprised toolkits designed for different types of partnerships, relevant to different stages of partnership, and focused on addressing particular partnership issues. Thus, the list of toolkits - though useful in its own right - did not facilitate navigation to the toolkits appropriate to any particular partnership. Further description and analysis of toolkits was, therefore, undertaken to break these into useful categories, report on the formats used and list feedback and lessons learned.

ASSESSMENT OF PARTNERSHIP TOOLKITS

The criteria used for this analysis were agreed by the project steering group and by Community Planning representatives and comprised the following:

1. Name of the toolkit

This section gives the full name of the toolkit as well as any other names by which it might be known.

2. Current Status

This section gives details of whether the toolkit is fully functional or still in development. It also notes those toolkits which are web-enabled

3. How and where to get access to the toolkit

This box gives a web address, postal address or contact details of where to get a copy of the toolkit

4. Source / Producer / Ownership

This section gives details of departments who commissioned the toolkits, consultants or authors who created the toolkits and other toolkits upon which they are based

5. Cost

This section gives details of the cost of buying the materials for the toolkit. It does not include potential cost of using an external consultant to facilitate the toolkit process

6. Partnership focus / Sector

This section gives details of the partnership themes for which the toolkit was designed

7. Level of Partnership

This section gives details of the level of partnership at which the toolkit is aimed (e.g. strategic partnership, community based partnership, etc.)

8. Stage / Age of Partnership

This section gives details of the age of partnership for which the toolkit is most appropriate (e.g. pre start-up, first year of partnership, mature partnership)

9. For use by Individual / Organisation / Whole Partnership

This section clarifies whether the toolkit is designed for use by an individual within an organization, or by a single organization within a partnership, or by the entire partnership.

10. Snapshot / Dynamic

This section indicates whether the toolkit is designed to give a cross sectional picture of the work of a partnership at any one moment in time or else creates a longitudinal picture of changes and development in the partnership over time

11. *Timescale for use*

This section gives the time commitment required to use this toolkit

12. *Format*

This section outlines the main sections contained within the toolkit and identifies the primary tools of which it is made

13. *Examples of users*

This section lists the number of users who have provided feedback on their experience of using the toolkit

14. *Users views and lessons*

If feedback has been recorded, this section gives details of some of the lessons learned.

15. *Contact details*

This section gives contact details for partnerships to report their experiences of using the toolkit

16. *Aims and objectives (Key Elements)*

This section lists some of the partnership questions and issues that the partnership toolkit might help to address. These questions are the ones which we believe will be asked most frequently by partnerships and individuals in them. In Appendix 3 (page 65) we present a full list of these FAQs.



Assessment of Partnership Toolkits

2 List of Toolkits

1. **Practice, Progress and Value** - Learning Communities: Assessing the Value they add (page 4)
2. **Learning Partnerships: Priorities and Performance**. A guide to positive self-review March 2000 (page 8)
3. **Partnerships with People: A Practical Guide** – Demonstrating how innovative and successful organizations bring the best out of their people to achieve significantly enhanced business performance (page 11)
4. **The Nacro Guide** to partnership working (page 14)
5. **Market Towns Healthcheck Handbook** (page 16)
6. **Partnership By Design** (page 19)
7. **Suffolk Partnership Evaluation Toolkit** (page 23)
8. **Five Vital Lessons** (page 25)
9. **NatPaCT PCT Competency Framework Pilot Self- Assessment Workbook for Competency. 5. Partnership** (page 28)
10. **Smarter Partnerships** (page 31)
11. **Renewal.net** (page 34)
12. **Joining Up to Improve Public Services** (page 37)
13. **Working Together Learning Together** (page 40)
14. **Act Local**. Community Planning For Sustainable Development. The Dutchchas Handbook (page 43)
15. **Communities Scotland: Detailed Guidance on Partnership Working** (page 46)
16. **Measuring Success: Effective Partnership Self-Assessment Workbook** (page 50)
17. **Partnership Scorecards** (page 53)

1. Practice, Progress and Value

<u>Name of tool/toolkit</u> Practice, Progress and Value - Learning Communities: Assessing the Value they add.
<u>Current status</u> <ul style="list-style-type: none">• Web Enabled (pdf format) Comment: Not web interactive
<u>How and where to get access to it</u> http://www.lifelonglearning.co.uk/learningcities/toolkit.pdf or hard copy from the DfES
<u>Source / Producer / Ownership</u> This guide has been developed for the Department for Education and Skills (DfES) and the Learning City Network from a qualitative research and development project managed by Sue Cara of the National Institute for Adult and Continuing Education (NIACE) and Professor Stewart Ranson of the School of Education, the University of Birmingham. Over a six month period, the project team used desk research, interviews with key people in learning cities and good practice case study analysis to arrive at this guide. A Steering Group representing the researchers, DfES, the Learning City Network - together with representatives of the Local Government Management Board, TEC National Council, UNISON and the Local Government Association - has seen the project through to publication. Published 1998.
<u>Cost</u> Free download from the internet
<u>Sector</u> <ul style="list-style-type: none">• Learning• Regeneration Comment: (potential for diversification)
<u>Partnership level</u> <ul style="list-style-type: none">• Local• Community Based• Strategic• Action orientated Comment: The tool is aimed at building Learning Towns and Cities but emphasizes the roles of communities and organizations of all sizes

Stage of partnership

- Pre start-up
- 1. Learning to Collaborate Across Organisational Boundaries
- 2. Getting Organised
- First 12 months
- 3. Towards a shared understanding
- More than 12 months review
- 4. Cycles of Learning

Comment:

For use by:

- Partnership

This tool kit is designed for partnerships to work on together.

Snapshot or dynamic

This tool is dynamic in so far as it describes detail for different stages of partnership. It also looks at a learning cycle and asks questions for review, refinement and expansion of partnership membership and activity.

Timescale for use

The toolkit is designed to be used by partnerships over a substantial period of time. Some of the action points are not lengthy processes in themselves but the message of continual investment in the partnership makes the tool a long term aid rather than a one-off exercise.

Form and format

Strand One: Partnership

1. Learning to Collaborate Across Organisational Boundaries: The rationale for partnership – considering questions on purpose, people, plans, processes, and performance
2. Getting Organised: The process of developing individual partnerships into a permanent and dynamic model which represents the whole community – includes Ideas for Action, Pitfalls and Perils, Essential, Assessment of Progress, Facts and Figures, and Examples in Action.
3. Towards a shared understanding: Adding value to individual initiatives so that the whole is greater than the sum of its parts – includes Ideas for Action, Pitfalls and Perils, Essential, Facts and Figures, and Examples in Action.

4. Cycles of Learning: Ensuring that a mature partnership improves as a partnership as well as improving in its activities - includes Ideas for Action, Pitfalls and Perils, Essential, Assessment of Progress, Facts and Figures, and Examples in Action.

Strand Two:

1. Learning to Involve the Public in Public Policy
2. Getting Organised
3. Towards a Shared Understanding
4. Cycles of Learning

Strand Three:

1. Towards a Model of Value Added
2. Internal Assessment
3. External Comparison: Benchmarking
4. Analysing the Added Value
5. Getting Organised – Internal Assessment
6. Towards a Shared Understanding – External Comparison
7. Cycles of Learning Evaluating Added Value
8. Moving Ahead - Three Year Development Plan

Examples of users

Website contains links to ten English Partnership Projects which have used this tool to link developing partnerships to learning and regeneration. These are:

- Birmingham – Developing a Corporate Lifelong Learning Strategy and a Learning Partnership
- Blackburn with Darwen – Identify appropriate partnerships and targets between new unitary authorities in the North West
- Bristol – Analyse and develop Bristol Learning Partnerships
- Durham – Establish a partnership to achieve social and economic regeneration
- Greenwich – Motivate Greenwich people to participate in lifelong learning through working in partnerships
- Kirklees – Build on existing Community Education Partnership to improve coherence of lifelong learning locally and widen participation from under-represented groups
- Middlesbrough – Develop the Learning Partnership for the Education Action Zone
- St Austell & Newquay – Secure a partnership between learning, economic regeneration and community development to bring tangible benefits to the area
- St Helens – Work in partnership with Oldham and Bolton focusing on towns emerging from industrial decline in order to develop performance indicators.
- York - Work collaboratively with Higher Education providers and schools to develop appropriate outreach activities for York school pupils.

User Views / Lessons

List of lessons for developing and sustaining partnerships including:

- 1.1 Complexity of Partnerships – need to understand other organizations' culture and priorities.
- 1.2 Different types of partnerships – an accurate understanding of the types of partnership will in itself add value
- 1.3 Partnership champions – successful learning partnerships frequently develop through the efforts of a single individual
- 1.4 Communication is critical to successful partnerships – reliance on effective and diverse methods of communications to sustain and develop activity, give, receive and reflect on information
- 2.1 Participation is a challenge to most partnerships – ICT seems to be a tool which could greatly increase the opportunity for citizens to voice their opinions directly
- 2.2 Share examples of participation practice – all projects welcome opportunities to hear about, and learn from existing practice
- 2.3 Build on existing relationships within partnerships – human capacity trust and understanding take a substantial amount of time to build within partnerships and are key to their success
- 3.1 When does evaluation commence? - Many projects do not feel they are in a position to evaluate their work. Evaluation tends to happen only by external forces i.e. funding regimes, government or legal requirements
- 3.2 Use of a range of evaluation methods – Almost all activity undertaken will have its own performance measures linked to funding and partners. There should be flexibility for projects to create their own criteria.
- 3.3 How to assess performance - Internal targets and external benchmarking

Facility to record feedback on user views

No

Aims and objectives (Key Elements)

Forming

- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we better understand our strategic context?

Acting/Developing service quality

- How do we allocate resources efficiently?
- How can we better understand the needs of clients and communities?

Measuring our performance as a partnership

- How can we measure the performance of the partnership?
- How can we measure the impact of the partnership?
- How do we establish performance baselines?
- How can we measure the reputation of our partnership?
- How do we assess the value for money that the partnership offers?

Measuring the difference we are making

- How do we select and measure key indicators

2. Learning Partnerships

<u>Name of tool/toolkit</u>
Learning Partnerships: Priorities and Performance. A guide to positive self-review March 2000
<u>Current status</u>
<ul style="list-style-type: none">• Web Enabled (download in pdf)
<u>How and where to get access to it</u>
http://www.llpevaluation.co.uk/Library/guide.pdf
<u>Source / Producer / Ownership</u>
The guide was prepared by York Consulting Limited on behalf of the DfEE and is based on discussions with a cross-section of partnerships.
<u>Cost</u>
Free
<u>Sector</u>
Learning
<u>Partnership level</u>
It is intended that this Guide will provide a reference point for local, regional and national partners involved in the evaluation of Learning Partnerships. Ideas are presented in the context of a comprehensive, three-tier framework which segments local self-review; regional evaluation; and national evaluation (regional and national evaluations being an aggregate of the activities at the local level).
<u>Stage of partnership</u>
Parts of the guide may be more useful to some than to others and this may depend on the stage of partnership development.
<u>For use by:</u>
<ul style="list-style-type: none">• Individual partnership representative• Organisational member• Partnership

Snapshot or dynamic

The guide provides a framework for partners to address the key planning, evaluation and review questions. Its purpose is to:

- enable the identification of consistent priorities and performance indicators, whilst allowing for variability and individuality at a local level.
- provide a reference point for continuous evaluation and review

Intelligence gathered will help to define baselines and targets/milestones. The same sources of intelligence can then be used to measure the 'distance travelled' or 'monitor performance' over time.

Timescale for use

Significant time commitment to undertake the entire process. Individual self assessment exercises could be done in a short/focused way. The guidance clearly states that the framework should be used to identify only those issues that most accurately reflect the needs and priorities of the partnership.

Form and format

Step One: Priorities (guidance and examples on)

- Headline Aims – what your partnership ultimately hopes to achieve for the locality
- Delivery Objectives – factors or barriers which local partners can directly influence to achieve the changes and improvements required
- Partnership Development Objectives – the activities necessary to ensure a co-ordinated and collaborative approach to addressing the delivery issues

Step Two: Performance (guidance and “Things to remember” on)

- Defining baselines and targets/milestones
- Measure progress over time

Step Three: Value Added – (Ideas, examples and “Things to remember”)

- Mapping – developing a better understanding of what is already being done, sharing information about existing and planned programmes, and developing a more collective knowledge and understanding.
- Added value actions and activities
- Partnership development activities

Step Four: Monitoring and Review (Examples)

- Formal review questions
- Informal review questions
- Links to regional evaluation
- Links to National evaluation

Regional Evaluation Guidelines

National Evaluation Guidelines

<p><u>Examples of users</u></p> <p>No</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>The discussion group on the National Evaluation of Learning Partnerships website (www.llpevaluation.co.uk) provides a route to sharing ideas, practice and experience.</p>
<p><u>Aims and objectives (Key Elements)</u></p> <p>Forming</p> <ul style="list-style-type: none"> • How can we better understand the future that we are trying to create? • How can we create an agreed vision? • How can we identify our development needs as a partnership? • How can we map our respective roles and relationships? • How can we better understand what we each bring to the partnership? <p>Building</p> <ul style="list-style-type: none"> • How do we need to change as we mature? • How can we tell where we are as a partnership? <p>Acting/Developing service quality</p> <ul style="list-style-type: none"> • How do we appraise options? • How do we allocate resources efficiently? • How can we better understand the needs of clients and communities? <p>Measuring our performance as a partnership</p> <ul style="list-style-type: none"> • How can we measure the performance of the partnership? • How do we establish performance baselines? <p>Measuring the difference we are making</p> <ul style="list-style-type: none"> • How do we select and measure key indicators? Yes

3. Partnerships With People

<u>Name of tool/toolkit</u> Partnerships with People A Practical Guide – Demonstrating how innovative and successful organizations bring the best out of their people to achieve significantly enhanced business performance
<u>Current status</u> <ul style="list-style-type: none">• Web Enabled pdf format
<u>How and where to get access to it</u> www.dti.gov.uk/pwp
<u>Source / Producer / Ownership</u> Partnerships with People is led and co-ordinated by the DTI and involves a large number of partners: ESRC; IMC; TUC; IPA; CBI; IOD; RSA; University of Brighton; IPD; IIP; Institute of Management; ACAS; ISM; Industrial Society; EEF
<u>Cost</u> Free to download
<u>Sector</u> The aim of this guide is to help organizations manage the change to a style of working which involves and includes all of its people. It is largely aimed at business but is applicable to organizations in all sectors.
<u>Partnership level</u> This guide was published in tandem with a £5m Partnership Fund to help organizations foster partnerships at the individual workplace and to encourage the spread of best partnership practice. It is aimed at individual organizations rather than at partnerships.
<u>Stage of partnership</u> Any stage.
<u>For use by:</u> For use by an individual organisation
<u>Snapshot or dynamic</u> This resource offers guidance and tools for self assessment

Timescale for use

The tools are divided into three stages of an overall timeframe:

- Stage 1 – starting out
- Stage 2 – moving forward
- Stage 3 – new horizons

Form and format

The guide is based around five key themes:

- Shared goals
- Shared culture
- Shared learning
- Shared effort
- Shared information

The guide offers a menu of ideas, suggestions and cautionary tales that various organizations, both public and private, have used and found worked for them.

There is a self-assessment tool

The guide lists organizations that can provide help

Examples of users

No

User views

No

Facility to record feedback on user views

No

Aims and objectives (Key Elements)

- How can we get to know each other better?
- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we develop SMART objectives?
- How can we map our respective roles and relationships?
- How can we understand our attitudes?
- How can we embed clear and effective values?
- How can we develop a more effective leadership style?
- How do we need to change as we mature?
- How do we deal with conflict or disagreement?
- How do we appraise options?
- How can we decide priorities?
- How do we encourage culture change?
- How can we enhance our delivery capacity?
- How can we help staff to change the way they behave?
- How do we allocate resources efficiently?
- How do we develop staff skills?
- How can we better understand the needs of clients and communities?
- How do we establish performance baselines?

4. The Nacro Guide to Partnership Working

<u>Name of tool/toolkit</u>
The Nacro Guide to partnership working
<u>Current status</u>
<ul style="list-style-type: none">• Hard Copy (download in pdf)
<u>How and where to get access to it</u>
http://www.nacro.org.uk/data/briefings/nacro-2001062503-csps.pdf Or hard copy from Nacro Crime and Social Policy Section 237 Queenstown Road London SW8 3NP
<u>Source / Producer / Ownership</u>
Community Safety Practice Briefing by David Mullett borrowing on work on partnerships by Shabnem Afzal, Mark Deane, Chris Fox, Clive Giles, Anne Lawtey, and Jim McManus.
<u>Cost</u>
Free to download (or £5 if sold)
<u>Sector</u>
Community Safety/Crime Reduction
<u>Partnership Level</u>
Partners with statutory responsibilities, as well as other community groups with a vested interest in community safety.
<u>Snapshot or dynamic</u>
Checklist to provide snapshot picture and action plan to implement over time.
<u>For use by:</u>
<ul style="list-style-type: none">• Partnership• Individual Partnership organisations Guidance for the partnership as a whole and individual action points for each partner agency

<p><u>Form and format</u></p> <p>This Guide to building and sustaining effective crime and disorder reduction partnerships covers:</p> <ul style="list-style-type: none"> The statutory make-up of the partnership The reasons for partnership working The ingredients of successful partnerships Creating and Sustaining Effective Partnerships Team Building Checklist of an effective partnership
<p><u>Timescale for use</u></p> <p>Guidance on what needs to happen over time from starting up a partnership to checking its success.</p>
<p><u>Examples of users</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>No</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Aims and objectives (Key Elements)</u></p> <p>Forming</p> <ul style="list-style-type: none"> • What is the best way of understanding each others organisations? • How can we ensure that every organisation and representative fully participates? • How can we map our respective roles and relationships? • How can we help individual members to understand their role? • How can we better understand what we each bring to the partnership? <p>Acting/Developing service quality</p> <ul style="list-style-type: none"> • How can we enhance our delivery capacity? • How do we allocate resources efficiently?

5. Market Tools Toolkit

<u>Name of tool/toolkit</u>
Market Towns Healthcheck Handbook
<u>Current status</u>
<ul style="list-style-type: none">• Web Enabled pdf format
<u>How and where to get access to it</u>
www.countryside.gov.uk/market-towns
<u>Source / Producer / Ownership</u>
Produced by the Countryside Agency
<u>Cost</u>
Free to download
<u>Sector</u>
The Healthcheck Handbook explains how communities can work in partnership to identify the town's strengths and weaknesses and draw up a plan of action.
<u>Partnership level</u>
The guide focuses on partnerships that represent the main interests of the community.
<u>Stage of partnership</u>
The handbook is a guide to the stages involved in setting up a partnership, doing a healthcheck, drawing up an action plan and putting the plan into practice
<u>For use by:</u>
Communities, and all key partners
<u>Snapshot or dynamic</u>
Snapshot.

<p><u>Timescale for use</u></p> <p>All stages: Setting up a market town partnership Gaining community commitment Completing a healthcheck Creating a vision Preparing an action plan Putting the plan into action</p>
<p><u>Form and format</u></p> <p>Extensive worksheets including checklists, case studies, self-assessment healthcheck snapshot, examples of survey questionnaires etc Linked to web-based directories:</p> <ul style="list-style-type: none"> • Community participation directory • Data sources and survey methods directory • Research directory • Funding directory • Business support directory • Contacts directory • Transport directory • Training directory
<p><u>Examples of users</u></p> <p>No</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>No</p>
<p><u>Aims and objectives (Key Elements)</u></p> <ul style="list-style-type: none"> • How can we better understand the future that we are trying to create? • How can we create an agreed vision? • How can we develop SMART objectives? • How can we better understand our strategic context? • How can we identify our development needs as a partnership? • What kind of leadership style do we have? Does it work for us? How can we develop a more effective leadership style? • How do we appraise options? • How can we decide priorities? • How can we enhance our delivery capacity? • How can we help staff to change the way they behave? • How do we allocate resources efficiently? • How do we develop staff skills? • How can we better understand the needs of clients and communities?

- How can we measure the performance of the partnership?
- How can we measure the impact of the partnership?
- How do we select and measure key indicators?

6. Partnership by Design

<u>Name of tool/toolkit</u> Partnership By Design
<u>Current status</u> Hard copy available on request
<u>How and where to get access to it</u> Scottish Enterprise Dunbartonshire 2 nd floor, Spectrum House Clyde Bank Business Centre Clydebank Glasgow G81 2DR Tel: 0141 951 2121
<u>Source / Producer / Ownership</u> Scottish Enterprise Dunbartonshire, working with local staff and partners have developed Partnership by Design over the last 18 months. It is based on the premise that there is a need to get smarter at working in partnership. Partnership by Design seeks to identify those solutions which are within the control of the partnership.
<u>Cost</u> Free
<u>Sector</u> Partnership by Design Promotion is aimed at the promotion of effective partnerships to develop and implement economic development strategies
<u>Partnership level</u> Developed at a local level but lessons transferable to larger partnerships
<u>Stage of partnership</u> Best suited to reviewing existing partnerships
<u>For use by:</u> Partnership by design has been developed mainly for application to partnerships but sections within it can be used for personal reflection by individuals or single agencies.

Snapshot or dynamic

This toolkit involves a progression starting with intelligence gathering, then followed by appraisal, and finally review

Timescale for use

The process of undertaking all the tasks in the toolkit would involve considerable investment of time. Individual exercises vary in length and complexity.

Form and format

Intelligence

Prior to reviewing individual Partnerships and their effectiveness, the Partnership by Design process provokes an “audit” of the number and range of Partnerships operating in the area. This information provides the basis on which to prioritise Partnerships to be appraised and reviewed.

Appraisal

The appraisal process is a desk-bound system for carrying out an initial appraisal of the partnership. The appraisal has been developed for two reasons: firstly to consider how well an existing partnership has been operating, and secondly to consider whether or not the organization should set up or join a new partnership.

Full Review

There are seven stages to the full process (it is not necessary for a partnership to pass through all these stages every time we review or start one - but if it goes into Stage 2, it must go through all the following Stages). A maintenance programme for the process itself and the products that go with it underpins these stages. The seven stages are:

1. Decision to Review:

Organisation decides that we should review a partnership.

2. Partnership Appraisal Part One:

An internal exercise where the organisation pools its knowledge of the partnership and it's fit with organisational goals and purpose.

3. Partnership Appraisal Part Two:

This stage of the process involves collecting the views of some of our partner representatives on the partnership.

4. Interviewee Feedback:

Provide feedback to partner interviewees, seeking individuals' reactions to the consolidated perspective.

5. Analysis:

Carry out a full analysis of the partnership, covering **all parts of the Review** and leading to recommendations on how to proceed.

6. Partnership Feedback & Negotiation:

Having carried out analysis, negotiate with partners on a plan of action for the partnership.

7. Implementation of Action Plan:

Work with partners to implement the actions and monitor progress.

The Appraisal Form

The Appraisal Form is linked to the setting up of a Partnership by Design database. The form is completed on-line and data entered into the database, which can then be manipulated and analysed to provide a source of information on partnership working. The Appraisal has three sections. Section one covers basic information about the Partnership, section two asks for an assessment of the impacts and contribution of the Partnership to the organisation targets and goals. Finally, section three seeks an overall assessment of the Partnership. After having completed the full appraisal form a decision will be made about whether or not to move to a full review. By using the database the information can be interrogated to provide a useful source of information about the complete range of partnership activity.

The Clipboard

When carrying out a full review the Clipboard is used. This is a semi-structured document in the form of a questionnaire, which provides the basis for a discussion around the Partnership in question. It is constructed around the seven key characteristics explained above. The clipboard is used in one-to-one interviews with approximately five members of the Partnership being reviewed. Interviews last around two hours.

The interviews and use of the clipboard seek to identify in detail issues that the partnership should be addressing and issues which the organization need to address. After all the interviews have been carried out interviewees are issued with a feedback report which summarises the overall scores for the partnership and the key issues which have been collectively identified.

What Happens Next?

The next stage of the process has two key elements:

- Partnership feedback and negotiation; and
- Implementation of Action Plan.

All interviewees are asked for feedback on the issues presented, the report then moves to a negotiation stage where the report is presented to the partnership, and the partnership agrees an Action Plan based on the issues identified.

Examples of users

No

User views

Progress to Date

- Partnership by Design database populated and operational (Internal).
- 26 partnerships gone through a full review.

- Action Plans being implemented by Partnerships.
- Regular staff workshop sessions for sharing of experience.
- Part of Performance management and Induction processes.
- Collecting and sharing benefits of using the process for all our partnerships.

Facility to record feedback on user views

Partnership by Design claims to be subject to continuous improvement. They are interested in feedback on 1. How well it works – can its content or processes be improved? 2. How easy is it to use – can it be made easier?

Aims and objectives (Key Elements)

Forming

- How can we get to know each other better?
- How can we create an agreed vision?
- How can we map our respective roles and relationships?
- How can we understand our attitudes?
- How can we help individual members to understand their role?
- How can we better understand what we each bring to the partnership?

Building

- How can we tell where we are as a partnership?
- How can we identify our development needs as a partnership?

Measuring our performance as a partnership

- How can we measure the performance of the partnership?
- How can we measure the impact of the partnership?
- How can we measure the reputation of our partnership?

Measuring the difference we are making

- How can we collect and use client feedback?

7. Suffolk Partnership Evaluation Toolkit

<p><u>Name of tool/toolkit</u></p> <p>Suffolk Partnership Evaluation Toolkit</p>
<p><u>Current status</u></p> <ul style="list-style-type: none"> • Web Enabled (download in pdf)
<p><u>How and where to get access to it</u></p> <p>Download using Acrobat Reader on www.idea-knowledge.gov.uk (requires registration before access is allowed)</p>
<p><u>Source / Producer / Ownership</u></p> <p>The evaluation tool is the result of a best value review of partnership working undertaken by Suffolk County Council in2002.</p> <p>It is based on the EFQM Excellence Model</p> <p>It is found on the IDEA website</p>
<p><u>Cost</u></p> <p>Free</p>
<p><u>Sector</u></p> <p>This resource can be altered to suit a wide range of authorities and their partners</p>
<p><u>Partnership level</u></p> <p>There is no set way for partnerships to use this tool. Some have completed it as a group, others have completed it separately and then come back to develop one response, whilst some partnerships have identified key people (partnership officers, Chairs, etc.) to complete it</p>
<p><u>Stage of partnership</u></p> <p>This tool is for partnerships that are already in existence. It comprises a Self Assessment Inventory and a template for an action plan based on this. Many partnerships have agreed to use the toolkit on an ongoing basis to review how effective they are.</p>
<p><u>For use by:</u></p> <p>There is no set way for partnerships to use this tool. Some have completed it as a group, others have completed it separately and then come back to develop one response, whilst some partnerships have identified key people (partnership officers, Chairs, etc.) to complete it</p>

<p><u>Snapshot or dynamic</u></p> <p>Self assessment Action Planning</p>
<p><u>Timescale for use</u></p> <p>The toolkit provides a means of evaluating partnership working at any one time but is intended to be used periodically to develop the partnership and includes an “Action Plan Arising From Partnership Assessment “ to facilitate this.</p>
<p><u>Form and format</u></p> <ol style="list-style-type: none"> 1. Partnership Details asks you to provide details of the partnership. Where possible these are Yes/No answers 2. Self Assessment Inventory has 28 to complete, based on the following principles: <i>Action Focus, Efficiency, Inclusivity, Learning and Development, Performance and Management</i> 3. Action Plan Arising from Partnership Assessment 4. Summary Assessment Sheet
<p><u>Examples of users</u></p> <p>23 Case study examples of practice of local strategic partnership working.</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>Send Feedback and examples to knowledge@idea.gov.uk</p>
<p><u>Aims and objectives (Key Elements)</u></p> <p>Forming</p> <ul style="list-style-type: none"> • How can we identify our development needs as a partnership? <p>Building</p> <ul style="list-style-type: none"> • How do we need to change as we mature? • How can we tell where we are as a partnership? • How can we identify our development needs as a partnership? <p>Measuring our performance as a partnership</p> <ul style="list-style-type: none"> • How can we measure the performance of the partnership? Yes • How do we establish performance baselines? Yes

8. Five Vital Lessons

<u>Name of tool/toolkit</u> Five Vital Lessons
<u>Current status</u> <ul style="list-style-type: none">• Hard Copy (downloaded in Rich Text Format)• Web Enabled
<u>How and where to get access to it</u> http://fivevital.educe.co.uk/m_tool.htm
<u>Source / Producer / Ownership</u> Content developed by Educe Ltd and GFA Consulting as part of an Education and Training Development Agenda project for the Department for Education and Employment.
<u>Cost</u> Free. The copyright arrangements for this guide permit reproduction and adaptation of these materials, provided that you acknowledge the source.
<u>Sector</u> Stresses the need for effective engagement of the private sector.
<u>For use by:</u> <ul style="list-style-type: none">• Individual partnership representative• Organisational member• Partnership
<u>Partnership Level</u> All
<u>Snapshot or dynamic</u> Can be used for both snapshot and longer term development.

<p><u>Form and format</u></p> <ul style="list-style-type: none"> • Partnership Life Cycle: Tool for understanding partnership development and deciding on action needed to improve partnership performance. • High Performing Partnerships: This is a self-assessment tool for reviewing the performance of strategic partnerships. It was developed out of earlier research for DfEE and Coventry & Warwickshire Chamber on critical success factors in economic development partnerships which drew on widespread experience and research both in the UK and internationally. • Involving the Private Sector: This section provides best practice advice on how to attract and sustain the involvement of the private sector in economic partnerships. It incorporates material previously published by the DfEE, "The Private Sector in Local Economic Development Partnerships: Coventry & Warwickshire TEC", published in the International Ideas and Innovation: Promoting Best Practice in Local Economic Development series. This has proved its value on many occasions and has been reviewed and augmented as part of this project. • Facilitation and Support Tools: 1. Shaping Partnership Direction – a tool to help clarify and guide how you want your network or partnership develop. 2. Taking Stock – questions to stimulate reflection on partnership health, strengths, weaknesses and ways forward. 3. Private Sector Advisory Network – a tool to help clarify roles and expectations where business people act in an advisory capacity. 4. Sector Co-ordinator Job Specification – an outline of the roles and functions typically required of someone employed with the task of building sector or cluster groups and partnerships. 5. Planning Group Activities – a framework for encouraging group members of sector groups etc., consider what they want to achieve from their group, and the types of activity they need to pursue.
<p><u>Timescale for use</u></p> <p>How can the tools be used?</p> <p>The tools are designed to help clarify performance issues and help partners agree priorities, future direction and joint action.</p> <p>You will likely find that they have value in considering relationships more generally with partners, not just the private sector.</p> <p>Use them as they are, or adapt them to your circumstances. Think laterally: For example, much of the content of sector co-ordinator specification will be helpful in thinking through the roles of partnership managers or development staff in other types of partnership.</p>
<p><u>Examples of users</u></p> <p>7 Case Study Examples</p>
<p><u>Facility to record feedback on user views</u></p> <p>No</p>

User views

Contains a commentary called *Case Study Lessons* which draws out critical lessons from partnerships who have used the *High Performing Partnerships* model. This draws out key lessons for both business and public sector partners.

Aims and objectives (Key Elements)

Forming

- How can we get to know each other better?
- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we embed clear and effective values?

Building

- How do we need to change as we mature?
- How can we tell where we are as a partnership?
- How can we identify our development needs as a partnership?

9. NatPaCT Self Assessment workbook

<u>Name of tool/toolkit</u>
NatPaCT PCT Competency Framework Pilot Self Assessment Workbook for Competency. 5. Partnership
<u>Current status</u>
<ul style="list-style-type: none">• Hard Copy (Download in pdf or Word)
<u>How and where to get access to it</u>
http://www.natpact.nhs.uk/competency_framework/partnership/
<u>Source / Producer / Ownership</u>
National Primary and Care Trust Development Programme
<u>Cost</u>
Free
<u>Sector</u>
Health
<u>Partnership Level</u>
Primary Care Trust
<u>Snapshot or dynamic</u>
Uses snapshot scorecard to prioritise urgency of actions
<u>For use by:</u>
<ul style="list-style-type: none">• Organisational member <p>Comment: The scorecard and examples given are all directed from the perspective of the PCT</p>
<u>Form and format</u>
<ul style="list-style-type: none"><input type="checkbox"/> Summary of Competencies and Tasks under this Competency<input type="checkbox"/> Scorecard of Detailed Descriptors and Demonstrators under each Task. <i>Descriptors</i> break down the Task into manageable pieces <i>Demonstrators</i> are the measures and indicators that enable you to test how well the PCT is doing.

<p>The following method of scoring the PCT's competence is adopted</p> <ul style="list-style-type: none"> <input type="checkbox"/> red urgent attention needed <input type="checkbox"/> amber some work needed <input type="checkbox"/> green doing well. <p><input type="checkbox"/> Tally Sheets These are used to draw up lists of red, amber and green scores.</p> <p><input type="checkbox"/> Summary Sheet This is used to Summarize the scores under each task</p>
<p><u>Timescale for use</u></p> <p>Flexible</p>
<p><u>Examples of users</u></p> <p>You can learn from the experience of other PCTs by using the Discussion Forums, Good Practice Library and database of organisational development initiatives at www.natpact.nhs.uk</p>
<p><u>Facility to record feedback on user views</u></p> <p>Suggestions for alternatives, improvements, refinements or additional features are welcomed and should be sent to:</p> <p>Helen.I.campbell@doh.gsi.gov.uk Or Helen Campbell, NatPaCT, Blenheim House, West One, Duncombe St, Leeds, LS1 4PL, Tel 0113 254 3800 Fax: 0113 254 3809</p>
<p><u>User views</u></p> <p>Experience of PCTs is recorded through the Discussion Forums, Good Practice Library and database of organisational development initiatives at www.natpact.nhs.uk</p>

Aims and objectives (Key Elements)

Forming

- How can we ensure that every organisation and representative fully participates?

Building

- How can we tell where we are as a partnership?

Acting/Developing service quality

- How do we allocate resources efficiently?

10. Smarter Partnerships

<p><u>Name of tool/toolkit</u></p> <p>Smarter Partnerships</p>
<p><u>Current status</u></p> <ul style="list-style-type: none"> • Hard Copy (pdf download) • Web Enabled (Fill in score sheets on-line and receive customized feedback instantly)
<p><u>How and where to get access to it</u></p> <p>http://www.lg-employers.gov.uk/psd/lgp/</p>
<p><u>Source / Producer / Ownership</u></p> <p>Employers Organisation, Local Government National Training Organisation, and Educe Ltd.</p>
<p><u>Cost</u></p> <p>Free</p>
<p><u>Sector</u></p> <p>This toolkit was produced to assist local authorities and their partners.</p>
<p><u>Partnership level</u></p> <p>The content of this site is particularly geared to those involved in partnerships with strategic roles, though much is relevant to operational partnerships. Tools on the site may also be used by facilitators and trainers working with groups of staff/partners.</p>
<p><u>Stage of partnership</u></p> <ul style="list-style-type: none"> • Pre start-up • First 12 months • More than 12 months review • More than 12 months change
<p><u>For use by:</u></p> <p>Smarter Partnerships tools can be used to look at personal or team development needs as well as those of the entire partnership.</p>
<p><u>Snapshot or dynamic</u></p> <p>Use the toolkit to:</p> <ul style="list-style-type: none"> <u>Do a quick health check of your partnership</u> <u>Assess your partnership in more depth</u> <u>Review the learning and skills needs you and your partners might have</u> <p>You can also:</p> <ul style="list-style-type: none"> Take advantage of resources to help develop your partnership:

case studies and tools to facilitate joined-up working
links to other on-line resources (eg, on leadership and change,
community and business involvement, thematic partnerships)

Timescale for use

Completion of the health check on line requires only a few minutes and feedback is instantaneous. Completing the more in-depth assessment, review and learning tools indicates a longer term process

Form and format

- “Partnership Health Check” - Online scorecard and feedback on Eight tests of a healthy partnership
- “Partner Responsibilities in Strategic Partnerships” - Use this tool to review functions and responsibilities that you need to perform effectively as partnership members
- Digging Deeper – Finding Answers” – Use this tool to analyse in depth how your partnership is working and review ways to improve it
- “Developing Skills for Partnership Working” - Use this tool to assess your learning needs relating to partnership working.

In the section titled Resources a 9 further partnership tools are given under 4 key themes:

Leadership

- Benefits of Partnership
- Developing Partnership Agreements
- Five Degrees of Partnership
- Assessing Partner and Stakeholder Interests

Trust

- What Makes a Good Partner?
- Ground Rules for Partnerships

Learning

- Partnership Life Cycle
- Ending Partnerships

Managing Performance.

- Partner Responsibilities in Strategic Partnerships

In a section entitled “Finding out more” a large number of web links are given to other partnership tools listed under headings of :

1. Reviewing partnership Working – Assessment/diagnostic tool and evaluations of partnership working.
2. Leadership and Change – Materials relating to leading and managing change in partnerships
3. Community and Business involvement – Guides to engaging the voluntary / community and private sectors in partnerships
4. Learning and Skills for Partnership Working – Learning materials, on-line networks, etc relevant to developing skills and knowledge for partnership working

5. Thematic Partnerships – Materials relevant to specific areas of partnership working, like crime and safety, lifelong learning and regeneration

Examples of users

Links to 8 case studies on partnership skills and development: Bradford Trident, Kent Partners Skills Programme, Islington ICT Strategic Partnership, Learning Labs in Suffolk, Organisational Raids in London, Sheffield First, Small Heath Community Forum, and Partnering for ICT Installation: National Grid For Learning

Each gives details of: Key Features, What was the Stimulus, How was the Need Tackled, What were the Outcomes, What was Learned, and Contact details for further information.

User views

No

Facility to record feedback on user views

Feedback can be directed through LGNTO.feedback@lg-employers.gov.uk

Aims and objectives (Key Elements)

Forming

- How can we get to know each other better?
- How can we ensure that every organisation and representative fully participates?
- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we identify our development needs as a partnership?
- How can we understand our attitudes?
- How can we help individual members to understand their role?
- How can we better understand what we each bring to the partnership?
- What kind of leadership style do we have? Does it work for us? How can we develop a more effective leadership style?

Building

- How do we need to change as we mature?
- How can we tell where we are as a partnership?
- How can we identify our development needs as a partnership?

Measuring our performance as a partnership

- How can we measure the performance of the partnership?
- How can we measure the reputation of our partnership?

11. Renewal.net

<u>Name of tool/toolkit</u> Renewal.net
<u>Current status</u> <ul style="list-style-type: none">• Hard Copy (download in pdf)
<u>How and where to get access to it</u> http://www.renewal.net/
<u>Source / Producer / Ownership</u> Renewal.net has been developed by the Neighbourhood Renewal Unit, working with: PA Consulting Group, Geoff Fordham Associates, and i-documentsystems.
<u>Cost</u> Free
<u>Sector</u> Partnership working as part of renewal and regeneration initiatives – New Deal for Communities, Neighbourhood Management and Area Based Initiatives.
<u>Partnership level</u> Partners are drawn from all sectors - public, private, voluntary, community - and at all levels
<u>Stage of partnership</u> Consideration of the problems that might affect existing partnerships

<p><u>For use by:</u></p> <p>Guidance useful for individuals, organisations, and partnerships. The lessons learned and suggestions for a checklist are aimed most effectively at partnership groupings</p>
<p><u>Snapshot or dynamic</u></p> <p>This tool asks some important questions but does not provide a means of accurate self measurement or comparison.</p>
<p><u>Timescale for use</u></p> <p>Clear recommendation that significant time should be set aside to consider partnership issues.</p>
<p><u>Form and format</u></p> <p>“Building a partnership” and “Working in Partnership” both give guidance on:</p> <ul style="list-style-type: none"> • What’s the problem • What are the causes? • What’s been tried? • Checklist questions <p>“Deciding Partnership roles and membership” provides guidance on</p> <ul style="list-style-type: none"> • What’s the problem • What are the causes? • What’s been tried? • Partnership design • Finding members • Supporting members
<p><u>Examples of users</u></p> <p>Case Study given for York Regeneration Partnership</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>Feedback or case study submissions to submissions@renewal.net</p>

Aims and objectives (Key Elements)

Forming

- How can we get to know each other better?
- What is the best way of understanding each others organisations?
- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we identify our development needs as a partnership?
- How can we map our respective roles and relationships?
- How can we understand our attitudes?
- How can we embed clear and effective values?
- How can we help individual members to understand their role?
- How can we better understand what we each bring to the partnership?

Building

- How can we tell where we are as a partnership?
- How can we identify our development needs as a partnership?

12. Joining Up to Improve Public Services

<u>Name of tool/toolkit</u> Joining Up to Improve Public Services
<u>Current status</u> <ul style="list-style-type: none">• Hard Copy (pdf)
<u>How and where to get access to it</u> http://www.nao.gov.uk/publications/nao_reports/01-02/0102383es.pdf
<u>Source / Producer / Ownership</u> Report by the Comptroller and Auditor General. Ordered by the House of Commons and Printed by The Stationary Office London
<u>Cost</u> Free
<u>Sector</u> Guidance for public, private and voluntary sector involved in delivering public services
<u>Partnership level</u> Policy setting and service delivery
<u>Stage of partnership</u> Joining Up to Improve Public Services looks at ways of changing and improving existing partnerships and reinforcing joint working in ways that promote the best delivery of services.
<u>For use by:</u> Government departments and their agencies looking to bring together public, private and voluntary sector bodies in formal and informal partnerships.
<u>Snapshot or dynamic</u> Describes the processes necessary for the successful evolution of a partnership over time.

Timescale for use

Not designed for completion as an exercise but describes processes to be developed over a considerable period of time.

Form and format

Good practice guide intended to help departments which are considering establishing joint working arrangements.

Provides a rationale for partnership working

- Taking a wider view
- Tackling intractable social issues
- Improving Delivery
- Promoting innovation
- Improving cost effectiveness

Highlights Key features of joint working

Considers how joint working can be made more successful

- Goals
- Progress Measurement
- Resources
- Leadership
- Working well together – shared responsibility

Lists key stages in designing joint working arrangements

- Who needs to be involved
- What incentives are needed to reinforce joint working
- What support is needed to improve the capacity of organizations to work together
- How to provide funding in ways which promote joint working
- How long should joint working last
- What accountability and regulatory framework will best support joint working

Lists key questions for departments wanting to achieve successful joint working

- 14 key questions for consideration of joint working

Examples of users

No examples of users but includes detailed assessment of five joint working initiatives:

- Rough Sleepers
- Early Years Development and Childcare Partnerships
- Sure Start
- Business Link Partnerships
- British Trade International

<u>User views</u> No
<u>Facility to record feedback on user views</u> No
<u>Aims and objectives (Key Elements)</u> Acting/Developing service quality <ul style="list-style-type: none">• How can we enhance our delivery capacity? Yes Measuring our performance as a partnership <ul style="list-style-type: none">• How do we assess the value for money that the partnership offers? Yes

13. Working Together Learning Together

<u>Name of tool/toolkit</u>
Working Together Learning Together
<u>Current status</u>
<ul style="list-style-type: none">• Hard Copy• Web Enabled
<u>How and where to get access to it</u>
http://www.wtltnet.org.uk/wtltnewsites2/Homepage.htm
<u>Source / Producer / Ownership</u>
<p><i>“Working together: Learning together” (WtLt)</i> is a training programme funded by the Scottish Executive to support all the partners involved in:</p> <ul style="list-style-type: none">• <i>Social Inclusion Partnerships</i> and• <i>Working for Communities Pathfinders</i>. <p>It is part of the Scottish Executive <i>“Listening to Communities”</i> programme.</p>
<u>Cost</u>
Materials are available free on the internet but the tools are designed to be facilitated by an external consultant.
<u>Sector</u>
Regeneration and Community Development
<u>Partnership level</u>
<ul style="list-style-type: none">• Local

<p><u>Stage of partnership</u></p> <ul style="list-style-type: none"> • Pre start-up • First 12 months • More than 12 months review • More than 12 months change
<p><u>For use by:</u></p> <ul style="list-style-type: none"> • Individual partnership representative • Organisational member • Partnership
<p><u>Snapshot or dynamic</u></p> <p>Self assessment and Action Planning</p>
<p><u>Timescale for use</u></p> <p>Original programme took 8 days spread out over several months</p>
<p><u>Form and format</u></p> <p>Facilitated discussions and exercises looking at</p> <ul style="list-style-type: none"> • Policy • Vision • Goals • Evaluation • Planning • Context • Prioritisation
<p><u>Examples of users</u></p> <p>All Social Inclusion Partnerships and Working for Community Pathfinders</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>Discussion forms on wtlit.net (require password)</p> <p>Other enquiries or information: Victoria Royston , Programme Co-ordinator <i>Working together: Learning together</i> Scottish Community Development Centre , 329, Baltic Chambers, 50, Wellington Street, Glasgow G2 6HJ Tel: 0141 248 1924 : Fax: 0141 248 4398 E-mail: scdc@cdf.org.uk</p>

Aims and objectives (Key Elements)

Forming

- How can we get to know each other better?
- What is the best way of understanding each others organisations?
- How can we ensure that every organisation and representative fully participates?
- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we better understand our strategic context?
- How can we identify our development needs as a partnership?
- How can we help individual members to understand their role?
- How can we better understand what we each bring to the partnership?

Building

- How do we need to change as we mature?
- How can we tell where we are as a partnership?
- How can we identify our development needs as a partnership?

Acting/Developing service quality

- How do we appraise options?
- How can we decide priorities?
- How can we better understand the needs of clients and communities?

Measuring our performance as a partnership

- How can we measure the performance of the partnership?
- How do we establish performance baselines?

Measuring the difference we are making

- How can we collect and use client feedback
- How do we select and measure key indicators

14. The Duthchas Handbook

<u>Name of tool/toolkit</u>
Act Local. Community Planning For Sustainable development. The Duthchas Handbook
<u>Current status</u>
<ul style="list-style-type: none">• Hard Copy
<u>How and where to get access to it</u>
http://www.duthchas.org.uk
<u>Source / Producer / Ownership</u>
The Duthchas Project was a demonstration project funded by the EU Life Environment Programme from 1998-2001. The Project worked with 3 Communities and 22 public agencies
<u>Cost</u>
Free
<u>Sector</u>
Community Development
<u>Partnership level</u>
The Duthchas Project focused on three Highland Communities but the methods described in the Handbook are generic and can be used in other contexts and for other purposes.
<u>Stage of partnership</u>
The Handbook describes steps and outlines processes relevant to the earliest stage of partnerships formation through to monitoring and evaluation of partnership performance.
<u>For use by:</u>
<ul style="list-style-type: none">• Individual partnership representative• Organisational member• Partnership
<u>Snapshot or dynamic</u>
The Handbook is very much about the processes involved in effective partnership working and identifies activities that will assist partnership working at different stages
<u>Timescale for use</u>
Timescales for many of the processes involved range from 3 months to a year.

Form and format

This step-by-step guide describes a process of working with the community to develop a strategy for environmental, economic and social wellbeing in the local community. The Handbook outlines five steps which it then breaks down into specific tasks

Step 1: Making a Start

- Getting Organised
- Sharing our Ideas Developing a Communications Plan
- Accessing Resources
- Involving Others
- Focusing on sustainability

Step 2: Mapping the Future

- Building a Picture
- Developing a Vision
- Agreeing the Priorities for Action

Optional: Describing the Area

- Measuring Change – All about Indicators

Step 3: Planning for Action

- Focusing on the Issues
- Making the Strategic Links

Step 4: Making it Happen

- Planning Projects
- Organising
- Setting up Partnerships and Organisations

Step 5: Measuring Progress

- Measuring and Monitoring
- Reviewing the Strategy

Examples of users

The Handbook was formed based on experiences in three pilot communities in the Highlands and Islands of Scotland – North Sutherland, Skye's Trotternish Peninsula and North Uist.

It reports to have been used successfully in other parts of the UK as well as in Sweden.

User views

Lessons Learned from the pilot areas revealed the main benefits of this approach as:

- Long term
- Identifying linkages
- Adding value
- Enabling different interests to work together
- Creating synergy
- Developing a common vision and objectives
- Agreement on priorities; open and shared by the community and agencies
- Tackling the most important things first
- Addressing the problems and barriers at an early stage
- Avoiding wasting resources on inappropriate developments
- Providing a powerful tool for working with agencies and achieving funding

Facility to record feedback on user views

No

Aims and objectives (Key Elements)

Forming

- How can we get to know each other better?
- What is the best way of understanding each others organisations?
- How can we ensure that every organisation and representative fully participates?
- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we better understand our strategic context?

Acting/Developing service quality

- How do we appraise options?
- How can we decide priorities?
- How can we better understand the needs of clients and communities?

Measuring our performance as a partnership

- How can we measure the performance of the partnership?
- How can we measure the impact of the partnership?

Measuring the difference we are making

- How do we select and measure key indicators?

15. Communities Scotland Partnership Toolkit

<u>Name of tool/toolkit</u> Communities Scotland: Detailed Guidance on Partnership Working
<u>Current status</u> <ul style="list-style-type: none">• Draft version on CD ROM
<u>How and where to get access to it</u> Can be accessed by e-mailing a request to bibbt@communitiesscotland.gov.uk
<u>Source / Producer / Ownership</u> Communities Scotland / Eglinton Management Centre
<u>Cost</u> Free
<u>Sector</u> Broad Principles which apply across sectors
<u>Partnership level</u> The guidance is aimed at work within a partnership context either at a strategic, operational, or community level.
<u>Stage of partnership</u> Various sections and tools within the toolkit are appropriate to partnerships at different stages from start-up through to mature partnerships.
<u>For use by:</u> The Guidance was developed for use by individuals but many of the tools are also appropriate for organisations and partnerships
<u>Snapshot or dynamic</u> The toolkit contains material relevant to different stages of partnership and offers the option of selecting tools to provide a snapshot view of the partnership or a dynamic development of the partnership.
<u>Timescale for use</u> Different tools have different timescales

Form and format

Tools are grouped into 6 sections:

1. Developing joint goals and objectives
 - Strategic planning: tools and techniques
 - Business plan format
 - Commitment matrix
 - Force field analysis
 - Process mapping
 - Brainstorming
 - Pareto analysis
 - Pay-off matrix
 - Identifying a superior process
2. Monitoring and evaluation
 - Monitoring team effectiveness
 - Guide to evaluation
3. Forming the group
 - Belbin team types
 - Transactional analysis
 - Training cycle
 - Effective teams
 - Achieving Synergy
 - Secrets of effective teams
 - Stages of team development
 - Team building questionnaire
 - Monitoring team performance
 - What is a team?
 - Project Colossus
4. Agreeing the ground rules
 - How to achieve effective meetings
 - Producing agendas
 - Producing minutes
 - Problem people at meetings
 - Meeting effectiveness review
 - Effective delegation
5. Understanding our partners
 - Strategic priorities
 - What is organizational culture?
 - Effectiveness Planning Framework
 - The management cycle
 - Attribute listing
 - Effective Communication

<p>6. Assessing and managing partnership relationships</p> <ul style="list-style-type: none"> • Identifying a superior process • Kilmann's five conflicting handling modes • The Johari window • Assessing readiness and capacity • Handling conflict • Relationship Matrix <p>Other Tools</p> <ul style="list-style-type: none"> • Stakeholder analysis • Performance indicators / balanced scorecard
<p><u>Examples of users</u></p> <p>No</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>Staff within Communities Scotland can contribute to the content to ensure it addresses the issues which arise as a result of participating in partnerships. Suggestions and comments are welcomed on all aspects of the guidance to Tracey Bibb at bibbt@communitiesscotland.gov.uk</p>
<p><u>Aims and objectives (Key Elements)</u></p> <p>Forming</p> <ul style="list-style-type: none"> • How can we get to know each other better? • What is the best way of understanding each others organisations? • How can we ensure that every organisation and representative fully participates? • How can we better understand the future that we are trying to create? • How can we create an agreed vision? • How can we better understand our strategic context? • How can we identify our development needs as a partnership? • How can we understand our attitudes? • How can we help individual members to understand their role? • How can we better understand what we each bring to the partnership? <p>Building</p> <ul style="list-style-type: none"> • How do we deal with conflict or disagreement? • How can we tell where we are as a partnership? • How can we identify our development needs as a partnership? <p>Acting/Developing service quality</p> <ul style="list-style-type: none"> • How do we appraise options? • How can we decide priorities? • How can we help staff to change the way they behave? • How do we develop staff skills?

Measuring our performance as a partnership

- How can we measure the performance of the partnership?

16. Measuring Success

<p><u>Name of tool/toolkit</u></p> <p>Measuring Success: Effective Partnership Self-Assessment Workbook</p>
<p><u>Current status</u></p> <ul style="list-style-type: none"> • Hard Copy
<p><u>How and where to get access to it</u></p> <p>Currently available as a printed document from:</p> <p>Gary Todd Corporate Services City of Edinburgh Council 12 St Giles Street Edinburgh</p> <p>Will be arranged in downloadable formats from the Community Planning website</p>
<p><u>Source / Producer / Ownership</u></p> <p>The workbook was developed by Corporate Services at Edinburgh City Council through the Edinburgh Partnership Working Group. The approach employed in the workbook is loosely based on the European Foundation for Quality Management's Excellence Model.</p>
<p><u>Cost</u></p> <p>Free</p>
<p><u>Sector</u></p> <p>All</p>
<p><u>Partnership level</u></p> <p>The workbook is designed as the first step towards improving the effectiveness of partnerships, joint working groups, and their respective boards of management and memberships. It recognizes that universal solutions are often inappropriate and recommends that partnerships may want to adapt the workbook to make it more suitable in terms of language and style.</p>
<p><u>Stage of partnership</u></p> <p>The workbook is designed to help existing partnerships review their work.</p>
<p><u>For use by:</u></p> <p>Partners can complete the workbook on their own or with other partners. It suggests that there are benefits to involving a number of groups in completing the workbook,</p>

including stakeholders, other relevant partnerships and staff.
<p><u>Snapshot or dynamic</u></p> <p>The workbook starts with a self assessment snapshot of what the partnership currently achieves. It then offers tools for prioritization and tracking progress toward partnership goals.</p>
<p><u>Timescale for use</u></p> <p>Working alone, the workbook takes about 3 hours to complete. If a number of partners are involved then this process takes longer.</p>
<p><u>Form and format</u></p> <p>The Workbook is divided into four main parts:</p> <p>Part 1 – Self Assessment. This part is divided into seven sections that cover most of the work of the partnership. Its asks for responses to three simple statements in each section and for a list of Strengths and Areas for Improvement.</p> <p>Part 2 – Prioritising Areas for Improvement. This section helps prioritise the Areas for Improvement identified in Part 1.</p> <p>Part 3 – SMART Goals. SMART stands for Specific, Measurable, Achievable, Resourced, and Timebound. This section helps turn Areas for Improvement into goals for action.</p> <p>Part 4 – Keeping track of SMART Goals. A tool for tracking progress towards goals.</p>
<p><u>Examples of users</u></p> <p>No</p>
<p><u>User views</u></p> <p>No</p>
<p><u>Facility to record feedback on user views</u></p> <p>The Edinburgh Partnership Working Group welcomes feedback via:</p> <p>Email city.plan@edinburgh.gov.uk Fax 0131 469 3604 Telephone 0131 469 3842</p>

Aims and objectives (Key Elements)

Forming

- How can we develop SMART objectives?
- What kind of leadership style do we have? Does it work for us? How can we develop a more effective leadership style?

Building

- How can we tell where we are as a partnership?

Acting/Developing service quality

- How do we appraise options?
- How can we decide priorities?

Measuring our performance as a partnership

- How can we measure the performance of the partnership?
- How can we measure the reputation of our partnership?

Measuring the difference we are making

- How do we select and measure key indicators?

17. Partnership Scorecards

<u>Name of tool/toolkit</u> Partnership Scorecards
<u>Current status</u> <ul style="list-style-type: none">• Hard Copy (in process of web-enabling)
<u>How and where to get access to it</u> Currently available as a printed document from: Richard Scothorne Rocket Science UK Ltd 1 St Colme Street Edinburgh EH3 1AA Or richard.scothorne@rocketsciencelab.co.uk Will be arranged in downloadable formats from the Rocket Science UK Ltd website at www.rocketsciencelab.co.uk
<u>Source / Producer / Ownership</u> The Scorecards have been developed with a range of partnership clients over the last 5 years including Prototype Employment Zones and New Deal Partnerships
<u>Cost</u> Currently free of charge (in practice, a royalty free licence) in return for detailed feedback on value and relevance. Bespoke versions available at negotiated cost.
<u>Sector</u> Has been used across a range of sectors
<u>Partnership level</u> The Scorecards are designed for use by all levels of partnership.
<u>Stage of partnership</u> The Scorecards are designed for any stage of partnership development but are particularly useful when used regularly as the partnership develops and evolves
<u>For use by:</u> There are different versions of the Scorecard for use by partnerships as a whole to help them assess the status of their partnership, by organisations who are partners to help them assess their role as partners and by individuals representing organisations round the table to help them assess their role as individual contributors

Snapshot or dynamic

The Scorecards are designed to be used regularly (at least once a year) to assess progress and pinpoint areas which need development. They enable users to translate qualitative information into quantitative scores which allow them to pinpoint areas of low and high scores, assess the range of scores and identify the trends in scores over time. Some users chose to identify target scores under specific headings which they will aim to reach over an agreed period of time.

Timescale for use

The Scorecards can be used in a variety of ways. Used by individuals they will take about 10 minutes to complete. Some partnerships or organizations use them creatively as the basis for workshops.

Form and format

There are three Scorecards

Individual Scorecard – this focuses on the extent to which the individual feels that they have the information, responsibility, accountability and support needed fully to contribute to the partnership

Organisational Scorecard – this focuses on the extent to which an organization is able to contribute fully to a partnership

Partnership Scorecard – this is designed for partnership members to score and it helps them assess the current developmental status of the partnership and the areas which need further development. It also allows them to measure the extent to which the partnership is changing over time.

Examples of users

UK Prototype Employment Zones, New Deal Partnerships, Local Learning and Skills Councils

User views

No

Facility to record feedback on user views

Rocket Science UK Ltd actively seeks feedback from users and the website will offer an easy access feedback facility

Aims and objectives (Key Elements)

Forming

- How can we get to know each other better?
- How can we better understand the future that we are trying to create?
- How can we create an agreed vision?
- How can we embed clear and effective values?

Building

- How do we need to change as we mature?
- How can we tell where we are as a partnership?
- How can we identify our development needs as a partnership?



Assessment of Partnership Toolkits

Appendix 1: Proposed navigational tool: Framework

Overleaf we set out the Framework for our proposed navigational tool to help users quickly find the best tool or toolkit for their requirement. It has a number of components:

- Along the top of the table there is an opportunity to pinpoint the kind of partnership and organisation that you are
- The categorisation along the top of the table also allows you to pinpoint the stage of development that the partnership has reached
- Down the side of the table you can pinpoint the purpose you wish to achieve through the use of a tool.

In Appendix 2 we have worked through an example of what the completed tool will look like in hard copy. The tool obviously lends itself to web-enabling but it can be used in hard copy.

Proposed navigational tool: Framework

What issues would you use a toolkit for?	Who are you?																										
	The partnership									Individual organisation in the partnership												Individual representative on a partnership					
	Strategic			thematic			locality			Local authority			Other public service			Private company or representative organisation			Voluntary organisation or voluntary sector body			Individual representative on a partnership					
	P*	Y*	M*	P	Y	M	P	Y	M	P	Y	M	P	Y	M	P	Y	M	P	Y	M	P	Y	M			
1. Focusing the Partnership																											
2. Building or developing the partnership																											
3. Measuring the performance of the partnership																											
4. Measuring and improving service performance																											

*P= planned or new
 *Y= young or evolving
 *M= mature or established



Assessment of Partnership Toolkits

Appendix 2: Proposed navigational tool: Worked example

What issues would you use a toolkit for?	Individual organisation
	Other public service
	Mature or established partnership
1. Focusing the Partnership	<ul style="list-style-type: none"> • How can we get to know each other better? Partnerships with People: A Practical Guide Suffolk Partnership Evaluation Toolkit • What is the best way of understanding each others organisations? • How can we ensure that every organisation and representative fully participates? • How can we better understand the future that we are trying to create? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we create an agreed vision? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide Suffolk Partnership Evaluation Toolkit • How can we develop SMART objectives? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we better understand our strategic context? Market Towns Healthcheck Handbook • How can we identify our development needs as a partnership? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook • How can we map our respective roles and relationships? Learning Partnerships: Priorities and Performance Partnerships with People: A Practical Guide Suffolk Partnership Evaluation Toolkit • How can we understand our attitudes? Partnerships with People: A Practical Guide Suffolk Partnership Evaluation Toolkit • How can we embed clear and effective values? Partnerships with People: A Practical Guide • How can we help individual members to understand their role? Suffolk Partnership Evaluation Toolkit

	<ul style="list-style-type: none"> • How can we better understand what we each bring to the partnership? Learning Partnerships: Priorities and Performance Suffolk Partnership Evaluation Toolkit • What kind of leadership style do we have? Does it work for us? How can we develop a more effective leadership style? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide
2. Building or developing the partnership	<ul style="list-style-type: none"> • How do we need to change as we mature? Learning Partnerships: Priorities and Performance Partnerships with People: A Practical Guide • How do we deal with conflict or disagreement? Partnerships with People: A Practical Guide • How can we tell where we are as a partnership? Learning Partnerships: Priorities and Performance Suffolk Partnership Evaluation Toolkit • How can we identify our development needs as a partnership? Suffolk Partnership Evaluation Toolkit • How do we introduce new organisations and representatives?
3. Measuring the performance of the partnership	<ul style="list-style-type: none"> • How can we measure the performance of the partnership? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Suffolk Partnership Evaluation Toolkit • How can we measure the impact of the partnership? Market Towns Healthcheck Handbook Suffolk Partnership Evaluation Toolkit • How do we establishing performance baselines? Learning Partnerships: Priorities and Performance Partnerships with People: A Practical Guide • How can we measure the reputation of our partnership? Suffolk Partnership Evaluation Toolkit • How do we assess the value for money that the partnership offers? • How can we collect and use client feedback Suffolk Partnership Evaluation Toolkit • How do we select and measure key indicators Learning Partnerships: Priorities and Performance

	Market Towns Healthcheck Handbook
4. Measuring and improving service performance	<ul style="list-style-type: none"> • How do we appraise options? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we decide priorities? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How do we encourage culture change? Partnerships with People: A Practical Guide • How can we enhance our delivery capacity? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we help staff to change the way they behave? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How do we allocate resources efficiently? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How do we develop staff skills? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we better understand the needs of clients and communities? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide

What issues would you use a toolkit for?	Individual organisation
	Other public service
	Planned or new partnership
1. Focusing the Partnership	<ul style="list-style-type: none"> • How can we get to know each other better? Partnerships with People: A Practical Guide • What is the best way of understanding each others organisations? • How can we ensure that every organisation and representative fully participates? • How can we better understand the future that we are trying to create? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we create an agreed vision? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we develop SMART objectives? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide • How can we better understand our strategic context? Market Towns Healthcheck Handbook • How can we identify our development needs as a partnership? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook • How can we map our respective roles and relationships? Learning Partnerships: Priorities and Performance Partnerships with People: A Practical Guide • How can we understand our attitudes? Partnerships with People: A Practical Guide • How can we embed clear and effective values? Partnerships with People: A Practical Guide • How can we help individual members to understand their role? • How can we better understand what we each bring to the partnership? Learning Partnerships: Priorities and Performance

	<ul style="list-style-type: none"> • What kind of leadership style do we have? Does it work for us? How can we develop a more effective leadership style? Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide
2. Building or developing the partnership	<ul style="list-style-type: none"> • How do we need to change as we mature? Learning Partnerships: Priorities and Performance Partnerships with People: A Practical Guide • How do we deal with conflict or disagreement? Partnerships with People: A Practical Guide • How can we tell where we are as a partnership? Learning Partnerships: Priorities and Performance • How can we identify our development needs as a partnership? • How do we introduce new organisations and representatives?
3. Measuring the performance of the partnership	<ul style="list-style-type: none"> • How can we measure the performance of the partnership? Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook • How can we measure the impact of the partnership? Market Towns Healthcheck Handbook • How do we establishing performance baselines? Learning Partnerships: Priorities and Performance Partnerships with People: A Practical Guide • How can we measure the reputation of our partnership? • How do we assess the value for money that the partnership offers? • How can we collect and use client feedback • How do we select and measure key indicators Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook

<p>4. Measuring and improving service performance</p>	<ul style="list-style-type: none"> • How do we appraise options? <i>Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide</i> • How can we decide priorities? <i>Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide</i> • How do we encourage culture change? <i>Partnerships with People: A Practical Guide</i> • How can we enhance our delivery capacity? <i>Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide</i> • How can we help staff to change the way they behave? <i>Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide</i> • How do we allocate resources efficiently? <i>Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide</i> • How do we develop staff skills? <i>Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide</i> • How can we better understand the needs of clients and communities? <i>Learning Partnerships: Priorities and Performance Market Towns Healthcheck Handbook Partnerships with People: A Practical Guide</i>
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Assessment of Partnership Toolkits

Appendix 3: Frequently asked questions

Below we set out our provisional list of ‘Frequently Asked Questions’ (FAQs). We would wish to refine and finalise these in our consultations – and these will form one way of finding an appropriate tool.

What issues would you use a toolkit for?	Strategic partnerships
	Planned or new partnership
1. Focusing the Partnership	<ul style="list-style-type: none"> • How can we get to know each other better? • What is the best way of understanding each others organisations? • How can we ensure that every organisation and representative fully participates? • How can we better understand the future that we are trying to create? • How can we create an agreed vision? • How can we develop SMART objectives? • How can we better understand our strategic context? • How can we identify our development needs as a partnership? • How can we map our respective roles and relationships? • How can we understand our attitudes? • How can we embed clear and effective values? • How can we help individual members to understand their role? • How can we better understand what we each bring to the partnership? • What kind of leadership style do we have? Does it work for us? How can we develop a more effective leadership style?

<p>2. Building or developing the partnership</p>	<ul style="list-style-type: none"> • How do we need to change as we mature? • How do we deal with conflict or disagreement? • How can we tell where we are as a partnership? • How can we identify our development needs as a partnership? • How do we introduce new organisations and representatives?
<p>3. Measuring the performance of the partnership</p>	<ul style="list-style-type: none"> • How can we measure the performance of the partnership? • How can we measure the impact of the partnership? • How do we establish performance baselines? • How can we measure the reputation of our partnership? • How do we assess the value for money that the partnership offers? • How can we collect and use client feedback • How do we select and measure key indicators
<p>4. Measuring and improving service performance</p>	<ul style="list-style-type: none"> • How do we appraise options? • How can we decide priorities? • How do we encourage culture change? • How can we enhance our delivery capacity? • How can we help staff to change the way they behave? • How do we allocate resources efficiently? • How do we develop staff skills? • How can we better understand the needs of clients and communities?