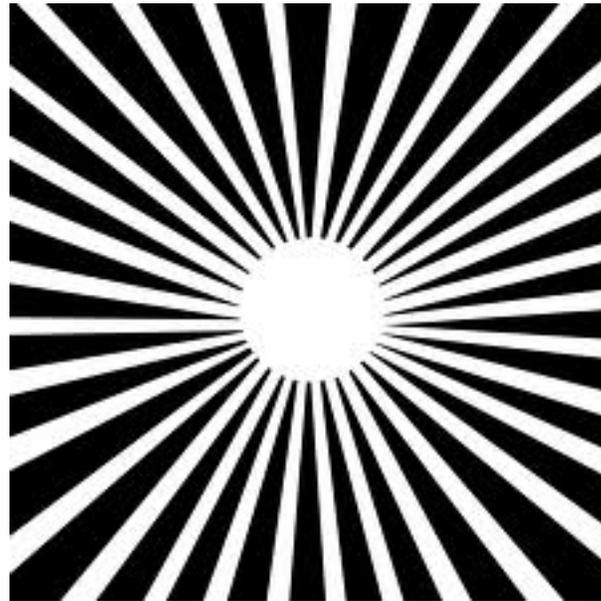# Building Capacity for Collective Impact Toolkit Series

Strategy 1: Partner Mapping

Part 1: Description of the Partner Mapping Process

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Part 1: Description of Partner Mapping Process

Part 1: SECTION I—Introduction

The following Partner Mapping Toolkit is a step-by-step guide to assessing the resources, interests, and readiness of existing and potential partners for collaborating towards a shared goal. This Toolkit can be used by any organization that has a desire to deepen their partnerships, form new collaborations, or explore readiness for a Collective Impact Initiative.

The Partner Mapping Toolkit is designed for teams to work through the following stages:

Stage	Focus	Outcome
Stage 1	**Identify your team**	An identified team of people to conduct the partner mapping process
Stage 2	**Define a shared goal**	A goal that team members share
Stage 3	**Select a geographic area**	Agreement upon a geographic area to start partner mapping
Stage 4	**Brainstorm existing and potential partners**	A list of existing and potential organizations for partner mapping
Stage 5	**Identify people to connect with**	List of individuals from existing and potential partners to meet with/interview
Stage 6	**Conduct exploratory interviews**	Interviews conducted to identify interest and resources of potential partners
Stage 7	**Determine next steps**	A reflection on information gathered and agreed upon next steps
Stage 8	**Partnership development and community conversations**	Shared action toward shared goals

We recommend first reading the entire document before beginning the work of moving through the stages.

Part 2: Forms and Tools provides resources to support you in this process. The complete list of forms and tools is listed on page 20.

These tools were developed and tested by the county health departments in Arizona, with the Arizona Department of Health Services staff coordinating the effort. This toolkit has been shared with and used by libraries who wanted to increase their community engagement efforts, and urban and rural coalitions seeking to increase literacy, school readiness, and to create healthier communities. If you would like more information about how to use these materials, feel free to contact me at cassandraoneill@me.com.

SECTION II—What is partner mapping?

Traditional approaches to increasing impact in the social sector have focused on growing and sustaining organizations—growing a budget, growing the number of programs, increasing staff and services delivered by individual organizations.

Recent attention has focused on multiple organization collaborative efforts and Collective Impact initiatives. In these initiatives, nonprofits and other organizations form collaborations to work together toward shared goals and outcomes.

Resources:

- Jane Wei-Skillern and Sonia Marciano, *The Networked Nonprofit*, Stanford Social Innovation Review, Spring 2008: http://www.ssireview.org/articles/entry/the_networked_nonprofit/

- Fay Hanleybrown, John Kania and Mark Kramer, *Channeling Change: Making Collective Impact Work*, Stanford Social Innovation Review, January 26, 2012: http://www.ssireview.org/blog/entry/channeling_change_making_collective_impact_work

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This Toolkit were created as part of an initiative of the Arizona Department of Health Services. Through this initiative Arizona's county health departments were charged with working with community partners to reach shared goals. The health departments developed partnerships and collaborations around the shared goal of increasing community health. The tools in this Toolkit were piloted with 15 county health departments.

The eight stages presented in this Toolkit are designed to help organizations explore what could be possible if they expanded their collaborative work.

This Toolkit is designed to help organizations discover new possibilities and resources that are made possible by partnering to reach share a shared goal.

From: **To:**

Organizations connecting   **Organizations collaborating to meet**
to reach their own goals   **the same shared goal**

SECTION III—The eight stages of partner mapping

Stage 1: **Identify your team**

Who is on your team?

Team members are valuable. They can help give input into decisions. They can share the work. They can help identify other potential partners and action steps for collaborative work.

The following set of activities has been developed for a team to complete together. Team members may be from one single organizational entity, or they may represent a number of different organizations.

As you think about undertaking a partner mapping process with your organization or team, who are some of the people that could be on your team?

See Part 2: Forms and tools for the partners mapping process, Stage 1

Stage 2: **Define a shared goal**

When you start this process, it's useful to have the goal of your team or group articulated in a broad way. The broader a goal is, the more likely that others will be aligned, that they can see their work and mission nested within this larger goal. If you articulate a goal narrowly, people will be less able to see their work aligned with the goal.

Wide goal—is the 50ft version of a goal
Narrow goal—is the 1 ft version of a goal

Example

The county health departments first articulated their goal narrowly—tobacco cessation. Using this goal they were unable to identify community partners; they were the only show in town when it came to tobacco cessation. When they articulated wider goal— improving health—they found more potential partners to engage with. They realized that they could bring the work of tobacco cessation to a wider initiative aimed at improving community health.

Wide goal
Improved community health

Narrow goal

Tobacco cessation

What are some of the ways you might describe your wide goal?

See Part 2: Forms and tools for the partners mapping process, Stage 2

Stage 3: **Select a geographic area**

Where do you want to begin? After you've put together your team and articulated your wide goal, it's time to define the geographic area that you will be mapping. This could be a community, a neighborhood, a city, a region, a school district, etc. It's a place to start.

Remember, you can always go back later and expand the geographic area.

Example

With the county health departments we suggested that they start with geographic areas where they felt the most comfortable—to look first to the low hanging fruit.

Some chose an entire county, others chose regions within the county and others chose a specific community.

See Part 2: Forms and tools for the partners mapping process, Stage 3

Stage 4: **Brainstorm existing and potential partners**

We think of this stage rather like doing a jigsaw puzzle. For many people, one of the first steps when completing a jigsaw is to put the pieces right side up, before you begin putting them together.

Translated into partner mapping—you need to have a good idea of all the possible partners before you begin your work.

See Part 2: Forms and tools for the partners mapping process, Stage 4, forms (a)-(g)

Stage 4: Part 1: Brainstorm categories

In this step your team will brainstorm past, existing, and potential partners in specific categories within the geographic area you have selected.

Example

The categories of organizations used by the county health departments that pilot tested this Toolkit included the following:
  - Schools and colleges
  - Libraries
  - Businesses
  - Government agencies and public services i.e. social services
  - Law enforcement etc.
  - Places of worship
  - Non-profit/community-based organizations
  - Youth programs
  - Parks/recreation
  - Service clubs i.e. rotary, hospitals, doctors, and clinics

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Your team can use this list as a place to start. You might also want to add some other types of organizations.

List all those you can think of that might be relevant for your partner mapping process.

See Part 2: Forms and tools for the partners mapping process, Stage 4: Part 1, forms (a)-(b)

Stage 4: Part 2: Brainstorm organizations in categories

Within each category (such as youth programs) brainstorm the specific organizations you might want to reach out to, and what you already know about them. This will help your team decide who to reach out to, and what you want to learn from a meeting.

> **See Part 2: Forms and tools for the partners mapping process, Stage 4: Part 2, form (c)**

Stage 4: Part 3: Explore what you already know

This step is designed to help you explore the partners identified in Stage 4: Part 2.

For existing partners—it's an opportunity to think about how you work with them now, how you worked with them in the past, and to begin the process of exploring what you'd like to learn more about.

For past partners—it's a time to think about how you used to work together, what that work looked like and, again, to explore what you'd like to learn more about.

For potential partners—it's a time to think about what you already know about the potential partners, and what you'd like to learn more about.

> **See Part 2: Forms and tools for the partners mapping process, Stage 4: Parts 3 and 4, forms (d)-(g)**

Stage 4: Part 4: Record, synthesize and reflect

Once your team has gathered the information **in Stage 4 - Parts 1, 2,** and **3**, you can put it together and begin the process of synthesizing and reflecting. This will help guide you as you decide with whom you would like to meet first to engage in the partner mapping process.

See Part 2: Forms and tools for the partners mapping process, Stage 4, form (d)-(g)

Stage 5: **Identify people to connect with**

At this point, your team has brainstormed the geographic area that you want to explore, the types of organizations in this geographic area, and some specific organizations that you might reach out to.

Now your team will decide who to conduct interviews with (potential or existing partners) and who will be conducting those interviews.

Then it's time to start making calls.

See Part 2: Forms and tools for the partners mapping process, Stage 5, form (a) and (b)

Stage 6: **Conduct exploratory interviews**

Now it's time to help your team prepare for and conduct interviews.

These are exploratory interviews. At this stage in the process it is important to keep an open mind. There is not yet anything specific that your organization would like to do. You are assessing the interest and feasibility of collaborating toward a shared goal.

These interviews or meetings will help you identify ways that you might be able to work with other organizations toward shared. They can lay the groundwork for future collaborative work.

Use the following pointers to guide you in your questioning:
* **Keep it broad**—remember the goal is to include potential partners, not exclude.
* **Be open**—at this point you have no clear idea of what partnerships could develop or lead to.
* **Keep an exploratory mindset**—your goal is to connect with people and to explore their work.

We have provided some sample questions that are purposefully broad (**See Part II***: **Forms and Tools for Stage 6**). You can use these to start with. Feel free to add your own. The questions aim to help you find out what other organizations are doing and which ones might share a wide goal with you.

See Part 2: Forms and tools for the partners mapping process, Stage 6, form (a) - (d)

Stage 7: **Determine next steps**

After your team has conducted interviews, you will have more information regarding which organizations are interested in working together toward shared goals.

Team reflection questions:
1. Which organizations are interested in working together toward shared goals?
2. What have you learned about the individuals that you have met with, the goals they have, the ways they are working toward those goals, and their interest in exploring working collaboratively with others? How can this help you?
3. At this point, would it be useful to have more meetings— reaching out to other potential partners?
4. Do you want to bring the people you met with together into a larger group meeting?
5. What other next step might your team take?

Remember—Take immediate action on any opportunities to partner that were identified during the interviews and meetings.

Example

The organizations that piloted these tools all found immediate ways to partner with organizations they met with. For them, this first round of interviews created lasting partnerships with different types of partners, including churches, gyms and neighborhood groups.

See Part 2: Forms and tools for the partners mapping process, Stage 7

Stage 8: **Partnership development and community conversations**

This stage is designed for those groups that realize there is interest in convening a larger group, bringing those potential partners interviewed together.

The process is designed to be generative and emergent. There is no single recommended best outcome to this part of the process.

There are three possible structures for the partnerships that may emerge:

- **Possibility 1: Partnerships form—**Partnerships are formed with individual partners/organizations to leverage impact and further shared goals.
- **Possibility 2: Entering an existing collaboration or coalition—**You enter into an existing coalition/collaboration in order to leverage impact and further shared goals.
- **Possibility 3: Formation of a new collaboration or coalition—**With key partners identified in this process, you form a new collaboration/coalition to leverage impact and work toward shared goals.

The relationships and shared work developed in each of these scenarios are equally valuable. There is no single desired outcome of the partner mapping process. As long as you are building connections that have their foundation in shared goals and work to increase impact, this is success.

The following graphics illustrate the three possible outcomes:

Possibility 1: Partnerships form
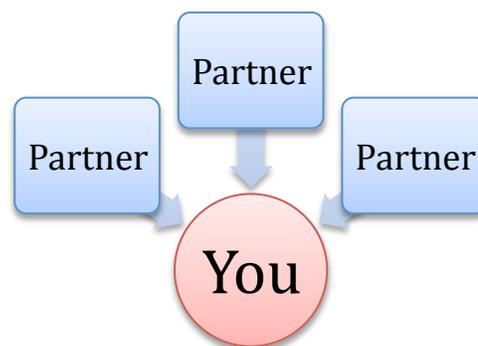
If your conversations result in the formation of partnerships with multiple individual organizations, the following considerations could help guide your work:

- As you become comfortable with the first wave of partnership building, think about reaching out to other potential partners by revisiting the categories of organizations in Stages 3-6 and identifying new categories to focus on.
- Think about expanding your work by broadening your geographic area.

Example

One county health department experienced great success in forming individual partnerships. Their county had many existing coalitions, and they decided the greatest opportunity for them to increase impact was to work in developing and enhancing their partnerships with other organizations, one at a time.

The story:
"Our approach has been to work with a variety of different groups. We first research the organization to determine what their goals may be. We have an open discussion about their goals and objectives and then we see where our message could potentially fit in. Here is a list of some of what we have done.
- At health clubs, including L.A. Fitness, Gold's Gym, The Jewish Community Center, Desert Sport and Fitness, and the YMCA, we have partnered with the personal trainers and provided information to perform brief interventions. We have trained five people at the YMCA to facilitate cessation classes.
- Through religious organizations we have had great success. In partnership with the Catholic Diocese in our area our program is currently working with eight parishes. Information regarding the ASHLine has been included in their weekly bulletins.
- In partnership with OBGYN clinics we are providing a bag with secondhand smoke information and tips. The clinics are stuffing their own information along with ours and giving them to clients.
- At Behavioral Health Agencies 10 staff have completed the training necessary to provide cessation services to their clients. COPE Community Services is currently in talks to have a representative from their outreach staff complete the training as well.
- We have also entered into partnerships with or are working with Community Wellness Coalitions, 12 step groups, animal welfare organizations, County Juvenile Court Center, and the Salvation Army."

Possibility 2: Enter an existing coalition
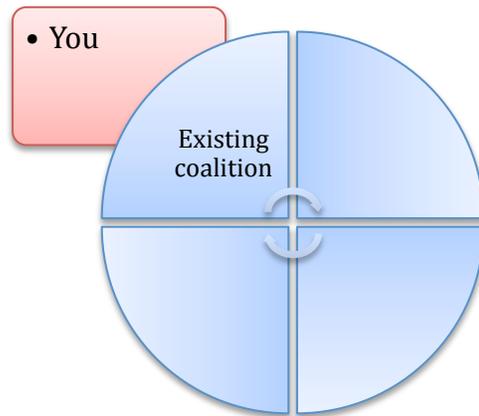
If in the course of your conversations you discover that there is already a coalition that shares your vision for the community, and you decide to join, the following considerations could help guide your work:

- How are you able to leverage your assets and resources to increase community impact?
- How can you utilize the work done in stages 1-7 to support the work of this collaboration? Are their new partners you have identified who could be at the table?

Possibility 3: Forming a new collaboration or coalition to leverage impact and further shared goals

Example 2

One county health department that pilot tested this process invited all the people who they interviewed in the partner mapping process to meet together and discuss existing resources.

The meeting was very successful. As a result of the discussions, people realized they did not know a lot about what other organizations were doing, and became aware of potential opportunities to collaborate. In the first meeting of the larger group, people introduced themselves and shared information about their work.

Participants enjoyed the meeting and decided they wanted to meet again as they saw the benefit of continuing to increase their knowledge of what was happening in their community.

If your conversations lead to an interest in forming a new collaboration or coalition, then you may need to host a community conversation. The following considerations could help guide your work:

- Who on your team will support you in planning for the community conversation?
- What are the goals of your community conversation?
- Who has the facilitation skills necessary to help plan and orchestrate the conversation?

See Part 2: Forms and tools for the partners mapping process, Stage 8

See Part 2—Forms and tools for the partners mapping process*

Stage	Forms
Stage 1	Form 1—Team report form
Stage 2	Form 2—Goal report form
Stage 3	Form 3—Geographical area report form
Stage 4	Form 4 (a)—Brainstorm categories
	Form 4 (b)—Brainstorm categories (blank version)
	Form 4 (c)—Brainstorm within a specific category
	Form 4 (d)—Chart summary for existing partners
	Form 4 (e)—Chart summary for past partners
	Form 4 (f)—Chart summary for potential partners
	Form 4 (g)—Synthesis report form
Stage 5	Form 5(a)—Existing/past partners to contact
	Form 5 (b)—Potential partners to contact
Stage 6	Form 6 (a)—Interview cover sheet
	Form 6 (b)—Note taking form, existing/past partners
	Form 6 (c)—Note taking form, new partners
	Form 6 (d)—Meeting results summary
Stage 7	Form 7—Collaboration steps
Stage 8	Partnership development and community conversations