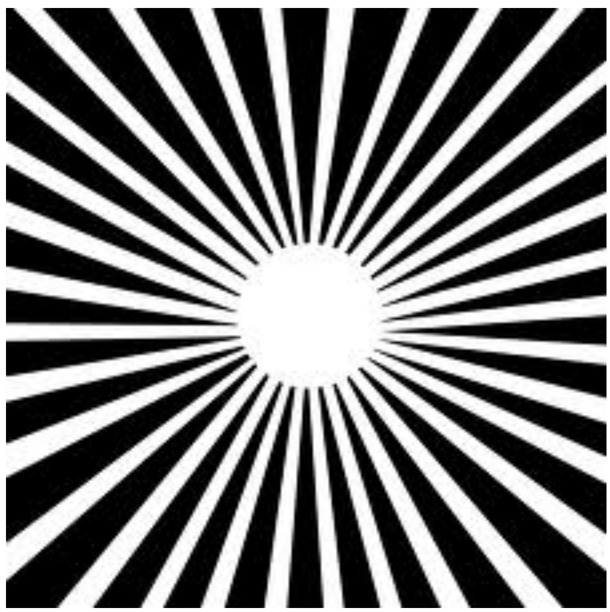
Building Capacity for Collective Impact Toolkit Series

Strategy 1: Partner Mapping

Part 2: Forms and tools for the partner mapping process



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Part 2—Forms and tools*

*** The forms and tools included in this document are designed for use with:**

Part 1: Description of the Partner Mapping Process

STAGE 1—Identify your team

Form 1—**Team report form**

Use this report form to document the members of your team.

Who is on your team?

Name	**Organization**	**Possible /agreed upon role** (brainstorming, conducting interviews, etc.)

Form 2—**Goal report form**

Guiding question:

- What is your wide goal? This is the goal you will be sharing with existing and potential partners.

Examples: improve health, create communities for all ages, improve education, etc.

Ideas for wide goal:

Wide goal: ____

Notes:

STAGE 3—Select a geographic area

Form 3—**Geographic area report form**

When you have selected a geographic area to focus on complete this sheet to record/ report your selected area.

Guiding questions:

- Which geographic area has your team selected?
- What criteria were used for selection?
- Who was involved in the selection of the geographic area?

Note:
It is important to build consensus among the team engaged in this process around the choice of geographic area.

Tip: There is no right answer or right place to start and there are no right or wrong reasons for selecting a geographic area.

Name: ______________________________ Date: ____________________

Organization: ____

1. Geographic area selected for partner mapping:

   ____

2. Reasons for selecting this geographic area:

   ____

   ____

3. People involved in selection of geographic area:

   ____

   ____

STAGE 4—Brainstorm existing and potential partners

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 4: Part 1:

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

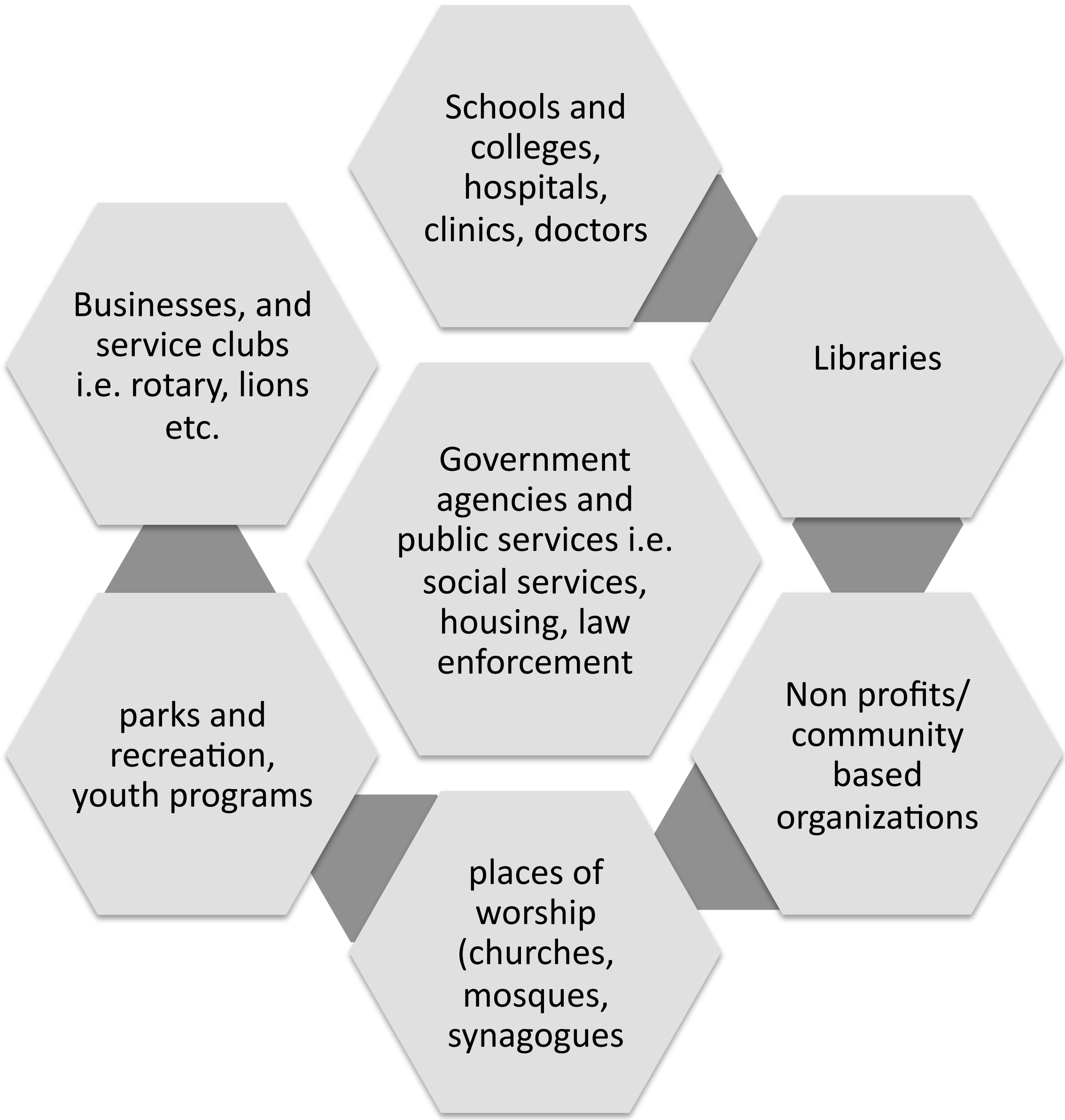
Your team can use the following graphic templates:

- **Form 4 (a): Brainstorm categories**—a graphic to help you brainstorm all the organizations and groups in each of these categories in your communities. This example shows the categories we used with the county health departments.

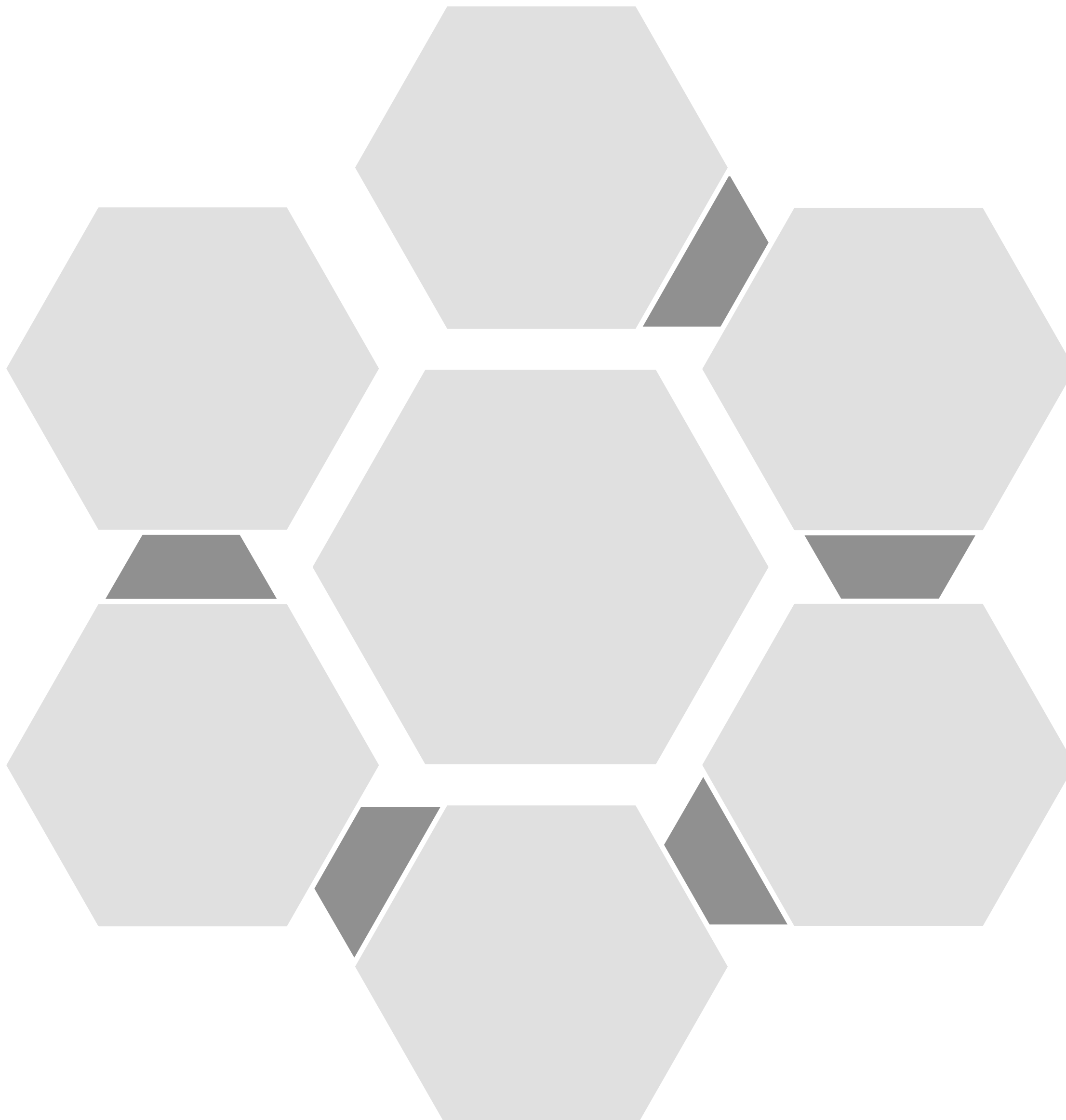
- **Form 4 (b): Brainstorm categories (Blank version)**—this could be used to brainstorm other categories.

Tip: What is important to remember here is that your team do this without judgment—this is not a time to comment on the caliber of a potential partner or a past experience, rather a time to open up to new possibilities.

Form 4 (a)—**Brainstorm categories**



Form 4 (b)—**Brainstorm categories (blank version)**



Stage 4: Part 2:

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 is helpful in planning who your team wants to meet with, and what you want to learn from your meetings.

Once 4 (a) or (b) have been completed, 4 (c) allows for further brainstorming within a specific category area.

Your team can use the following graphic template:

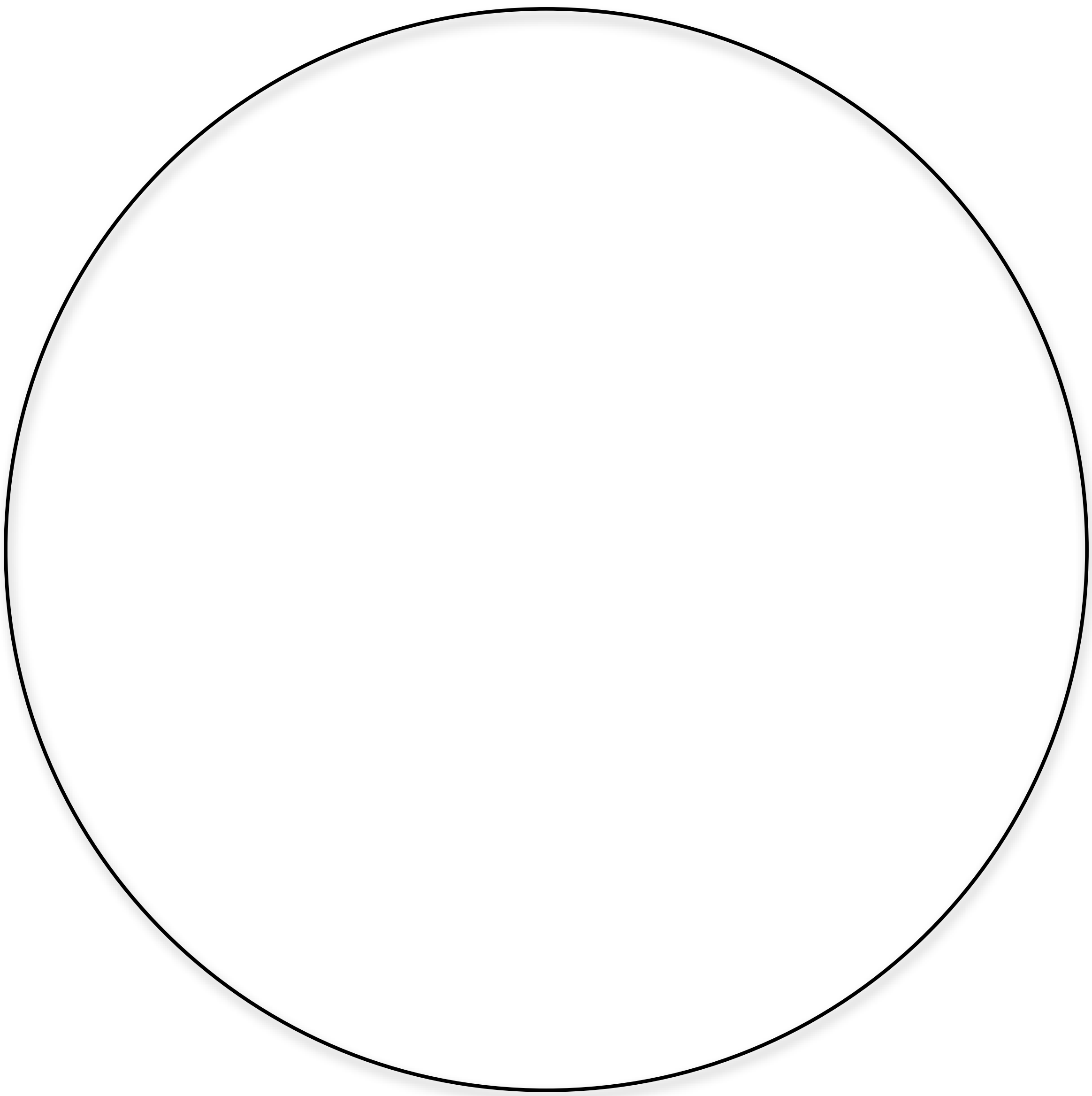
- **Form 4 (c): Brainstorming within a specific category**

Form 4 (c)—**Brainstorm within a specific category**

Note: It is simple to complete this graphic by hand. Alternatively, a bigger version could be made on a flipchart and completed with marker or post-in notes.

Category to brainstorm ____

Organizations in this category:



Stage 4: Part 3: Explore what you already know

This step is designed to help you explore the partners that have been 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 know about the potential partner and what you'd like to learn more about.

Questions for brainstorming before setting up interviews:

A. Detail for existing partners

1. Organization name	2. What are we currently doing with these partners?	3a. What would we like to do with them that we aren't currently doing?	3b. What would we like to do more of?	4. What do we want to learn more about?

B. Detail for past partners

1. Organization name	2. What did we do with these partners in the past?	3. What would we possibly like to do with these partners in the future?	4. What do we want to learn more about?

C. Detail for potential partners

1. Name of organization	2. What do we know about what they are doing?	3. What do we want to learn more about?

Stage 4: Part 4: Record, synthesize and reflect

Once your team has gathered the information in Parts 1, 2, and 3, you can put it together to begin synthesizing and reflecting. This will help you make decisions about who to set up meetings with.

Use the following Forms:

- **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**

Form 4 (d)—**Chart summary for existing partners**

Detail on Category: ___________________________ (for example businesses, libraries, schools) **for existing partners**

1. Organization name	2. What are we currently doing with these partners?	3a. What would we like to do with them that we aren't currently doing?	3b. What would we like to do more of?	4. What do we want to learn more about?

Form 4 (e)—**Chart summary for past partners**

Chart 1: Detail on category: ___________________________ (for example businesses, libraries, schools) **for past partners**

1. Organization name	2. What did we do with these partners in the past?	3. What would we possibly like to do with these partners in the future?	4. What do we want to learn more about?

Form 4 (f)—Chart summary for potential partners

Chart 1: Detail on category: ___________________________ (for example businesses, libraries, schools) **for potential partners**

1. Name of organization	2. What do we know about what they are doing?	3. What do we want to learn more about?

Form 4 (g)—Synthesis report form

Name: ________________________________ Date:_________________________

Your organization: ____

In reflecting on what you have noticed in Stage 4, please answer the following questions:

1. What surprised you?

2. What is exciting about what you found?

3. What opportunities do you see?

4. Which organizations and people are you excited about?

STAGE 5—Identify people to connect with

Form 5(a)—**Existing/past partners to contact**
Form 5 (b)—**Potential partners to contact**

Partnership building has its foundation in having different types of conversations. This means that you must provide opportunities for people to engage.

In Stage 5 team members select individuals and organizations to contact, from their list of existing and past partnerships, as well as potential new partners.

During the pilot testing of this Toolkit the participating organizations selected individuals and organizations from three of the categories they had identified during the brainstorming activities. The purpose of this was for the organizations to reach out to a few people initially, and then move to other categories as they continued this process. You may want to select individuals or organizations from a different number of categories.

Use the following forms to help you:

Form 5 (a)—Existing/Past partners to contact
Form 5 (b)—Potential partners to contact

Form 5 (a)—**Existing/past partners**

1. Identify three organizational categories you would like to begin with (for example: businesses, libraries, schools). Next identify the people (existing/past partners) you have decided to contact first.

Category	People/Organization
1.	
2.	
3.	

2. What were the factors that led you to select these existing or past partners to talk with first?

Form 5 (b)—**Potential partners**

1. Identify three organizational categories you would like to begin with (for example: businesses, libraries, schools). Next identify the people (potential partners) you have decided to contact first.

Category	**People/Organization**
1.	
2.	
3.	

2. What were the factors that led you to select these categories and potential partners to talk with first?

STAGE 6—Conduct exploratory interviews

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**

During Stage 6, you will reach out to people and ask to set up one-on-one conversations. The goal of these conversations is to learn more about the organization and to share information about this process.

Start with the list of individuals your team has decided to contact first—Forms 5 (a) and 5 (b). Decide who will contact each people on the list.

Once you have divided up the work, team members will contact the individuals and ask them to either meet in person or schedule a time to talk on the phone. Interviews can take anywhere from 20 minutes to an hour. **Remember that the goal here is not to complete the form, but to build a relationship.**

Tip: Think about going to the interviews in pairs so that one person can take notes. If this is not possible, take very brief notes in the meeting and then give yourself 10 minutes immediately after the interview to complete the write-up. It's hard to create a meaningful conversation with someone if you have your head buried in a notebook.

The interviews—what to ask

The guiding questions—Forms 6 (b) and (c)—are designed to be strengths-based. This means that they:

a. Focus on identifying existing resources, strengths and expertise in the community;
b. Explore what might be possible through collaboration with existing resources; and
c. Are brain-friendly. They help people come up with new information.

Strengths-based approaches are very different from traditional approaches. Traditional approaches:

a. Focus primarily on the identification of what does not exist, and then present solutions that are dependent on new funding;
b. Focus on deficit-framed questions; and
c. Focus conversations on identifying barriers and ways to overcome them, rather than exploring what is working well and what would make the biggest difference.

As a result of the traditional focus, more tends to be known about the things that aren't working. Less is known about what is working, AND what assets and resources exist that might be combined to create the desired results.

Things to pay attention to in the interviews

The goals of the meetings/conversations are to:

- Start building relationships or renew existing relationships,
- Learn about potential new partners and learn more about existing/past partners,
- See if and how others want to be involved in the future, and
- Begin to make connections and identify potential opportunities for collaboration.

Bullet points for setting up a meeting/phone call with potential/new partners:

- I would like to set up a time to talk with you about your organization and your work,
- I'm interested in learning more about what you do, and
- I'm also interested in sharing what we are doing.

Thoughts on preparing for and scheduling meetings/phone calls:

- If you don't know anyone at an organization, you can ask people that you know if they know anyone, or if they have a suggestion of who to talk to that might be interested; or you can go ahead and contact the Executive Director.
- Review any information about the organization that is on the Internet before you meet with them so you know something about what they do.

Form 6 (a)—**Interview cover sheet**

The following is a cover-sheet that can help you record your attempts to schedule a time to talk/meeting, and keep records of the people you speak with.

Name of person conducting the interview:	
Name of person being contacted:	
Organization the person represents	
Existing, past or potential partner	
Date of interview/meeting	
In person? (circle your answer)	yes no
On the phone? (circle your answer)	yes no

Form 6 (b)—**Note taking form, existing/past partners**

We have provided the following note taking form to capture the information that you gather in this conversation. You may not have time to cover all the questions. You may ask questions that come up as you talk. We've provided space for you to capture the information.

Tip: Remember, the questions are designed to be strengths-based. They are brain-friendly and help people come up with new information that could useful when thinking about collaborating with existing resources.

1. When you think about the work of your organization, what are some of the things that you are most proud of? What does your organization do that has the most impact?

2. When you think about your success, what do you see as some of the greatest assets, resources, and strengths of your organization?

3. What do you see as the greatest strengths and resources in the communities you work in?

4. Are there any changes in your organization that we may not be aware of that are important for us to know? Any new things happening?

5. As you think about potential collaboration, are there any resources that you think could be built upon for even greater success?

6. What is your interest level in exploring new ways of partnering with us?

7. How interested would you be in participating in a future conversation with other organizations about collaborating?

8. Any suggestions of others that we should talk with? They can be people affiliated with organizations or individuals who are passionate about collaboration.

9. Other questions?

Reflecting question for interviewer:

After you've finished talking with the person, please think about your experience and what you learned.

- Did anything surprise you?
- Do you see any possibilities for partnering?
- How did it go compared to how you thought it would go?

Form 6 (c)—**Note taking form, new partners**

We have provided the following note taking form to capture the information that you gather in this conversation. You may not have time to cover all the questions. You may ask questions that come up as you talk. We've provided space for you to capture the information.

Tip: Remember, the questions are designed to be strengths-based. They are brain-friendly and help people come up with new information that could useful when thinking about collaborating with existing resources.

Part 1: Exploratory questions about the person/organization.

1. What is your primary mission and your vision for your work in the community?

2. What do you do?

3. What are some of the things you are most proud of or most excited about in your work?

4. What do you do that has the most impact?

Tip: At this point, you can share something about the resources and assets you bring to the community, (for the county health departments it was knowledge about health and health education, history of work in the community around tobacco, skills in partnering etc.) You can share that you are currently looking at finding other people and organizations who are interested in partnering to reach shared goals.

Part 2: Interest in or ideas about collaboration

Then find out some more about their assets and resources if it hasn't come in the earlier questions, i.e. ways they communicate with others, partnerships they may be involved in or interested in making, knowledge they want to share with the community, etc. Find out about their interest level in future partnerships or meetings, and see if they have any suggestions about who you can talk with that might be interested. Questions such as:

5. How interested would you be in participating in a future conversation with other organizations around collaborating to promote shared goals?

6. Do you see any connections between your work and ours?

7. Any suggestions of others that we should talk with? They can be people affiliated with organizations or individuals who are passionate about collaboration.

8. Other questions?

Reflecting question for interviewer:

After you've finished talking with the person, please think about your experience and what you learned. Did anything surprise you? Do you see any possibilities for partnering? How did it go compared to how you thought it would go?

Form 6 (d)—**Meeting results summary**

This form is designed to capture significant findings or activities that happened during the Stage 6 conversations. Please capture anything that you'd like to share that has happened related to developing collaborations with existing or potential partners.

Please list significant findings or activities here:

STAGES 7—Determine next steps

Form 7—**Collaboration steps**

There are many ways that successful collaborations can begin, grow and create impact. Here are some simple steps to consider when launching a collaboration:

- **Step 1:** Identify people with a shared interest who want to take action.
- **Step 2:** Frame a shared goal for this group. This goal should be wide enough to include a large group.
- **Step 3:** Identify champions who can provide support that will lead to shared action.

Step 1: Identify people with a shared interest who want to take action

Guiding question during this step:

- Who wants to make a change or do something about this shared interest?

Step 2: Frame a shared goal for this group. This should be wide enough to include a large group

Guiding question during this step:

- How can the shared goal be framed in a way that will increase the likelihood of attracting others? For example, if goal is framed too narrowly, i.e. smoking cessation, there will be fewer opportunities to partner than if the goal is framed more widely, such as increasing health outcomes.

Step 3: Identify Champions who will provide support which will lead to shared action

Guiding questions during this step:

- Who will step up to provide organizational support to this effort/group?
- What strengths and resources do the people with the shared goal bring to the table?
- What could possibly be done, by connecting existing resources, to make progress toward the shared goal?
- Are there additional resources (from potential new partners or other sources) that could be dedicated to the shared goal from ?

STAGE 8—Partnership development and community conversations

Using whole system methods

There are many ways that community conversations can be convened.

There is a range of strengths-based facilitation methods that can be used to assist individuals to think creatively about what they most want to see. These methods can guide discussion around leveraging what currently exists to create impact. We like to use whole system methods, such as Appreciative Inquiry, Open Space Technology, and the World Café. We have used these during the pilot testing of this Toolkit with the staff from the county health departments.

Whole system methods adhere to the following common principles, which lead to their success:

1. **Maximize engagement—**Structure participation opportunities that allow for conversation in pairs and small groups before reporting back to the large group. This leads to high engagement and full participation. Traditional meetings often limit participation to saying something in front of the whole group. Only a small percentage of people will participate in these circumstances.
2. **Focus on strengths—**Focus the attention on existing strengths and connections to shared goals. This is accomplished by posing carefully constructed questions that support creative thinking and idea generation.
3. **Respect diverse learning styles—**Offer multiple ways to provide input, including writing as well as speaking. Allow for diverse learning styles. Whole system methods allow for participation in multiple ways, including writing rather than speaking and posting thoughts for gallery walks to increase participation and engagement.
4. **Stay positive—**Focus on the goal you want to reach—what you wish to create together—not the problem you wish to solve. Recent research on the brain shows that traditional deficit-focused approaches lead to: a decrease in energy among participants, a narrow range of responses, a focus on what can't be done without new funding, and solutions that are beyond the control of anyone present to implement. Changing the questions that people are asked can create an entirely different result. Focusing attention on existing strengths and desired outcomes results in: new connections and learning, identification of possibilities of actions that can be taken by participants, increase in energy, an increased ability to see the big picture, and increased efficacy.

Following these principles creates very different results from traditional meeting facilitation.

Thoughts on community conversations

Community conversations are an important process. And different processes can lead to different results. It is best to go into these conversations with the confidence of careful planning and an open mind.

The intended outcomes of the community conversations are to:

- **Develop and implement** strategies to achieve a shared vision,
- **Reflect on success** and learn continuously, and
- **Continue to expand** and develop new partners.

Community conversations could begin by addressing the following:

- **The development or expansion of partnerships**—are the right people in the room? Who else might need to be involved?
- **Creating a shared vision—**is the group in agreement about the large goal? Is it something they can get behind? Does it help them move closer toward fulfilling their organizational missions?
- **Connecting existing resources to the vision—** by focusing on what can be done with existing resources, the group will develop sustainable activities, which can be initiated and continued without adding resources or waiting for new funding.

Tip: A small step, or series of steps, that can be quickly taken together build confidence. It also means that the group is not in a holding pattern waiting for new resources (like the funding of a grant proposal).

Tip: The use of whole system methods is very different from traditional facilitation methods. We recommend using a facilitator who has been trained and has experience using whole system methods.