


NAVIGATING *the*
PSO PARTNERSHIP TRAIL



FIELD GUIDE

for

PHILANTHROPY-SERVING ORGANIZATIONS



WITH GRATITUDE TO THE MANY PSO LEADERS
AND PRACTITIONERS WHO CONTRIBUTED
THEIR EXPERTISE AND TIME TO HELP DEVELOP
THIS GUIDE FOR THE FIELD.

CONTENTS



FOREWORD



ENGAGING IN BIGGER AND BETTER PSO PARTNERSHIPS TO MOVE PHILANTHROPY FORWARD

United Philanthropy Forum is pleased to provide this new resource, “Navigating the PSO Partnership Trail: A Field Guide for Philanthropy-Serving Organizations.” The guide offers a variety of tools and resources to help regional and national philanthropy-serving organizations (PSOs) engage in more effective partnerships and collaborations with other PSOs.

A key strategic priority for the Forum is to help catalyze, encourage and facilitate partnerships and collaborations between and among all PSOs. This was a key impetus for why we decided to transform our network in 2017 to bring together a diverse group of regional and national PSOs to lead change and increase impact in philanthropy. There was a shared belief among PSOs that we all needed to work better together if we were going to maximize our efforts and move the needle on critical issues in the field.

Our members have told us that the Forum network has resulted in some early successes in helping them partner and collaborate with their PSO colleagues in bigger and better ways. For example, 86% of Forum members have indicated a high or moderate level of value in the opportunities to partner and collaborate with national PSOs through the “new” Forum; 83% said the same about partnering and collaborating with regional PSOs through the Forum. In addition, nearly three-quarters of CEOs or senior leaders of 15 national PSOs said in interviews last year that what they valued the most so far about their new Forum membership was the opportunity for more and better partnerships with regional PSOs.

But there is much more work to be done to continue to grow and strengthen PSO partnerships, and we hope this field guide will help. Effective PSO partnerships have the potential to combine the forces of PSOs for greater collective impact, letting each PSO maximize its core strengths. If done well, partnerships and collaborations can add value to PSOs’ members and constituents, improve PSOs’ capacity, and move philanthropy forward.

We hope you will find this field guide both enjoyable and helpful in advancing your PSO’s work by sparking new ideas and helping you gain a deeper understanding of what it really takes to effectively navigate the PSO partnership trail.

Regards,

David Biemesderfer

President & CEO

United Philanthropy Forum

A handwritten signature in black ink, appearing to read "David Biemesderfer". The signature is fluid and cursive, with a large initial "D" and "B".

THINKING ABOUT PSOS AND COLLABORATION

Embrace the Trail



WHY A FIELD GUIDE?

This guide is designed to help PSO practitioners navigate the partnership trail, based on tools, practices and lessons from those who have made the journey. We think the trail metaphor is apt for a number of reasons. Trails aren't the same, with distinctive terrain, routes and destinations. Some parts can be fun. Some parts can be rocky. The same trail can be a breeze on a nice day and a struggle on a stormy one. Sometimes the trail is well-worn. Other times you'll be blazing it anew.

The goal of the guide is to prepare you and your organization for the journey—from departure through challenges and opportunities that emerge along the way to final completion and reflection.

Because PSO partnerships, like trails, can differ from each other in important ways, we've designed this as a field guide, based on practitioner experience, describing moves that work in the real world, focused on what is happening in the field. The guide is based on conversations, interviews, surveys and exercises with more than a hundred PSO practitioners.

WHY A GUIDE FOR THIS FIELD?

In preparation for United Philanthropy Forum's expansion of its network to include national philanthropy-serving organizations in 2017, it surveyed regional and national PSOs and asked about their top needs. Getting support in building partnerships was tied for the greatest need. Since then, collaboration among PSOs has been on a steady rise, as more leaders form relationships with each other, organizational partnerships become more common, and collaboration skills are increasingly required to meet the needs of members and support the work of philanthropy.

The past few years have witnessed increases on both the demand and supply sides of partnership. PSO members are increasingly looking for support on intersectional work involving multiple issues. And PSOs are increasingly in a better position to provide that support. Some are still experimenting with single programs. Others are getting the hang of partnerships and initiating them more often. Still others are seeing opportunities to use collaboration to expand their mission and take their work to scale.

The entry to partnerships was a bit confusing to some PSOs in the need to understand a method for determining who to partner with, what to expect, and basically a need to understand the rules of this new road. The Forum also recognized that although regional PSOs had become fairly used to a culture of sharing and collaboration and had developed some norms over the first 18 years of the network, the national PSOs

presented new opportunities and ways of working that were a bit unclear at times. Each of the national PSOs are a bit different in their business models and cultures. PSOs asked for a map or frame to prepare to enter into partnership and so, in collaboration with PSO colleagues from across the Forum network, we have created this guide for the field.

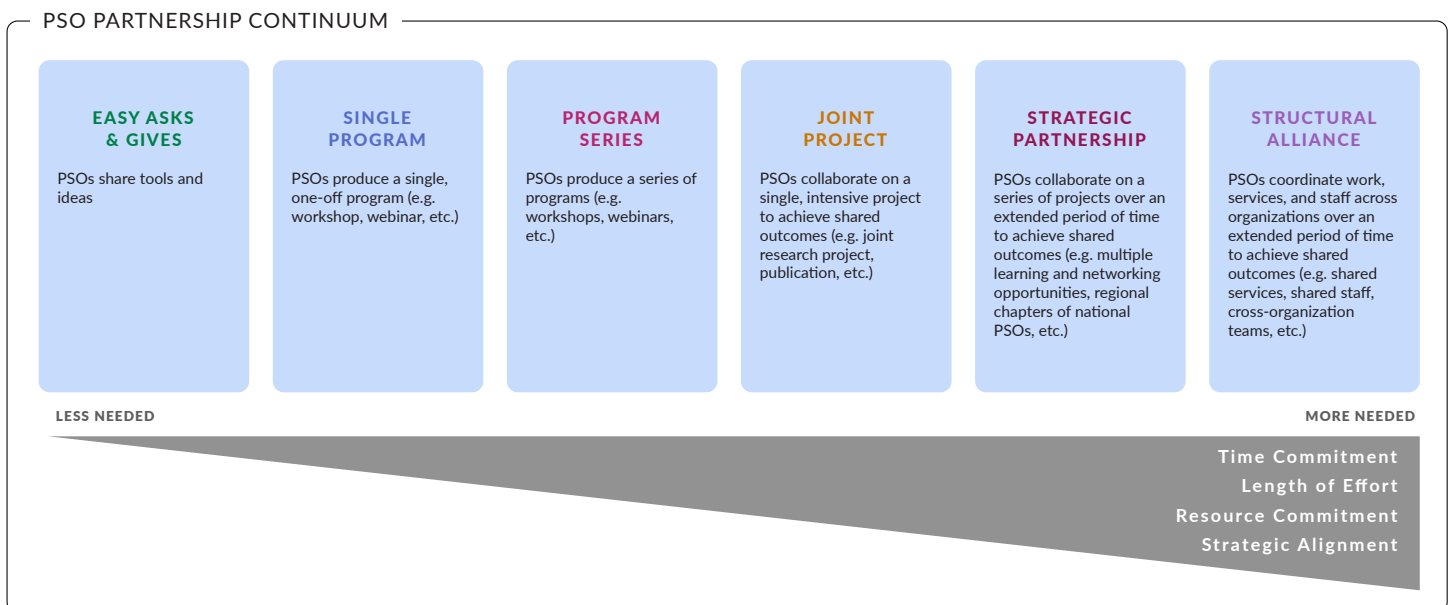
Although each partnership and collaboration is unique, you will be building capacity for future endeavors with each new trail taken and we want you to acknowledge that this is a key reason for engaging in partnerships and collaboration.

A WORKING MODEL



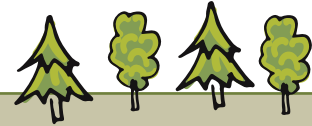
Let's think of a partnership as *any collaboration between two or more philanthropy-serving organizations* to achieve agreed-upon ends. Of course, PSOs engage in other kinds of partnerships, with nonprofits, funders, government—all worthy. But this guide focuses on PSO-PSO collaboration in particular. In turn, consider Amy Edmondson's definition of collaboration in her book *Teaming*: "Collaboration is a way of working with colleagues that is characterized by cooperation, mutual respect, and shared goals. It involves sharing information, coordinating actions, discussing what's working and what's not, and perpetually seeking input and feedback."

The continuum below was developed by United Philanthropy Forum to identify six types of partnerships. As the continuum moves right, the time and resource commitment required, the length of the effort, and the need for strategic alignment all are likely to increase. Many PSO leaders suggest starting small with a new partner, on the left side of the continuum. However, we know that opportunity is rarely linear so we hope that you will use the tools in this guide to help determine your readiness to seize opportunity anywhere along this continuum and jump in where you are able.



THINKING ABOUT THE WHY

Practitioners cite a range of potential benefits envisioned in undertaking partnerships. In general, there are three categories of benefits: for members, for the organization, and for the field of philanthropy. More specifically, potential partnership benefits tend to include impact on mission-critical issues, increased value to members, new revenue sources, financial economies of scale, organizational efficiencies, accessing expertise and content, recruiting new members, and reaching new stakeholders.



EXERCISE 1: WHY GO ON THE PARTNERSHIP TRAIL?

Think about the benefits of a current or potential partnership that is important to your PSO. Identify the top benefit in each of the following four areas.

TOP BENEFIT TO OUR ORGANIZATION	TOP BENEFIT TO OUR MEMBERS	TOP BENEFIT TO THE FIELD	TOP BENEFIT TO MY OWN WORK
<p><i>Expanded reach of our work and reputation in the field</i></p>	<p><i>Greater resources and expertise on topic members care about</i></p>	<p><i>Amplified knowledge to inform grantmaking for deeper impact</i></p>	<p><i>Build relationships and skills in partnering</i></p>

QUOTES ON PSOs AND COLLABORATION



We are grateful to the many PSO colleagues who contributed their experiences and wisdom to this Field Guide. Their quotes and shared knowledge can be found throughout the guide and are offered to their colleagues to help make all of our journeys more successful. We hope you will also add to the growing expertise and learning around PSO partnerships as you take your own path.

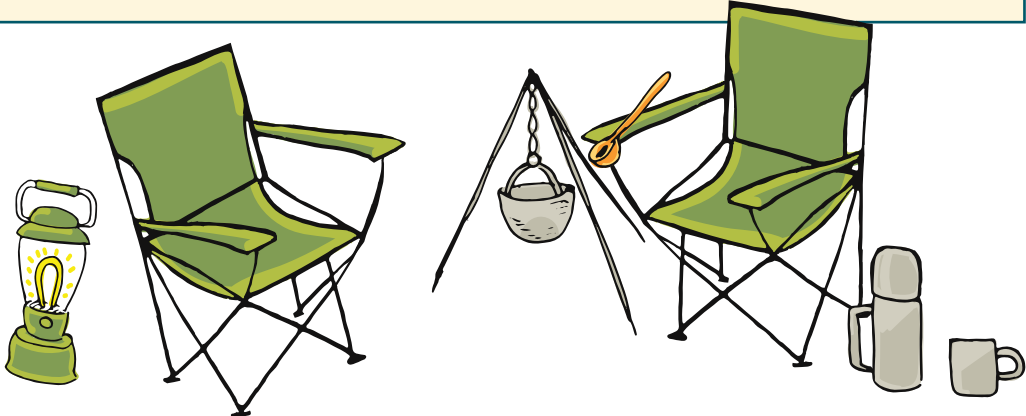
“Partnerships build collective power.”

“You’ve got to set up the relationship.
Recognize what each of you needs. Build it together.”

“A number of PSOs have great strengths, but unless we collaborate,
we aren’t taking advantage of the strengths they offer.”

“It’s sometimes hard to be honest with yourself about your staff capacity.
You want to partner, but sometimes the capacity isn’t there—in your own
organization or in your partner’s. We’ve run into the most trouble with this. A
number of times we had to do way more than our partner because they didn’t
have the capacity.”

“It’s a myth that partnerships save you time! The purpose
of collaboration isn’t to save resources but to advance content
and outcomes.”



LOOKING AT YOUR COLLABORATION FITNESS



Prepare for the Journey

Navigating the partnership trail is not a technical challenge but an adaptive one. There are no quick fixes or go-to shortcuts. It takes time, patience, learning, and practice. The PSO leaders who are becoming especially adept at partnerships do so not because they see it as easy but because they understand it can be hard. They know what it takes to do partnerships well, have built enough collaboration skills to feel confident that their partnerships will succeed, and have enough experience to have their eyes wide open to the obstacles that stand in the way. In short, they have elevated their collaboration fitness levels, both individually and organizationally.

INDIVIDUAL FITNESS: THREE TRAITS OF A TRAILBLAZER

Our conversations with PSO practitioners uncovered three main characteristics of those who experience success in partnering with other PSOs:



HEART IN: EMBRACE THE WHO AND WHY

When practitioners talk about their favorite partnerships, it nearly always seems to come down to this dimension—the more personal, emotional, intangible and almost spiritual aspects of the work. They want to walk together safely and with a spirit of generosity and collegiality. They know the purpose of the partnership and have their eyes on the prize.

“We think that working together makes the journey that much more enriching and beneficial to our organizations individually and collectively and serve as an example for the field and for our future work”



HEADS UP: CLARIFY THE WHAT

This is about identifying and developing the essential practical ingredients of PSO partnerships—clarifying interests, ways of working, roles and responsibilities, MOU, etc. Practitioners consistently emphasize the importance of thinking ahead about all aspects of the partnership.

“Understanding the business model and goals of you partner as well as your own and communicating this detail is essential”



HANDS ON: ADJUST THE HOW

The commitment and practical planning are done. Now comes the doing. This is the messy, fun, challenging, changing, unpredictable part of the work. It requires hands-on, adaptive approaches. Practitioners reflect that every partnership trail has sudden turns and unexpected obstacles that require adjusting your approach as you go.

“Often there is a disconnect between those that agree on a project partnership and those that then have to execute on the work; partnerships co-created from the beginning tend to be much more successful”



EXERCISE 2: RANK YOUR TRAITS

First, think about the three traits in terms of how well you do each. Rank them, from best to worst. Put a check mark in the appropriate column for each.

	1ST	2ND	3RD
Heart In: Embrace the Who and Why	<i>✓ Usually jump in because I am excited about the possibility or new idea</i>		
Heads Up: Clarify the What			<i>✓ Usually sitting down and carefully planning the details is not my favorite part of the project so I put less energy here</i>
Hands On: Adjust the How		<i>✓ I tend to jump into the doing and how and not the planning.</i>	

Next, reflect on why you ranked them that way. What examples and lessons come to mind? What do you think stands in the way of improvement?

ORGANIZATIONAL FITNESS:

Are You Partnership-Ready?

In their efforts to make their organization “partnership ready,” PSO leaders think about a range of organizational practices that can shape the success of collaboration. The below exercise provides a way to do a quick-and-dirty assessment of your organizational fitness in eight areas essential to successful partnerships.

EXERCISE 3: PARTNERSHIP MUSCLES					
For each of the areas below, rate your organization’s current condition by putting a checkmark in the box that best indicates where that muscle is between strong and weak.					
PARTNERSHIP MUSCLE	CURRENT CONDITION				
	WEAK		STRONG		
	1	2	3	4	5
Communications: our ability to identify and achieve our communications goals for partnerships					
Culture: our ability to ensure our partnerships work with our particular culture, both internally (staff/board) and externally (members)					
Evaluation: our ability to identify and assess the impact of partnership efforts and learn from that assessment					
Finances: our ability to identify and achieve our financial goals for partnerships					
Implementation: our ability to successfully implement partnership activities					
Relationships: our ability to form trusted, candid and generative relationships with people in our partner organizations					
Strategy: our ability to design partnerships to meet our goals and our partner’s goals					
Staff: our ability to mobilize the right staff, in the right roles, with the right skills and knowledge, to produce a successful partnership					

WORKING ON THE PEOPLE AND CULTURE



Gather Your Hikers

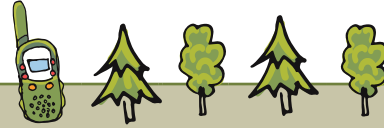
Seasoned trailblazers consistently emphasize the personal dimension in reflecting on the keys to effective partnerships. In short, it's about relationships. That includes both relationships between partnering organizations and within them. Bringing the human in, cultivating trust, demonstrating respect, making things fun, making room for candor—these and other moves are consistently cited by PSO practitioners as essential to collaboration. Understanding the culture of organizations is also vital to shepherding good relationships with people that work within those cultures.

EXERCISE 4: KNOW YOUR PEOPLE AND THEIRS

It's intuitive but often overlooked: partnerships between PSOs are partnerships between people. Use this exercise to help their people get to know your people, and vice-versa.

Begin by thinking about an important current or potential partnership. First, list the people in your organization who will be participating in some way in the partnership, including you. Second, write down one aspect of their personal story—where they grew up, pastimes, family, characteristics, quirks and so on. (In other words, write down the kinds of things partners might not know about each other in the normal course of partnership work.) Third, write about their particular role on the partnership—what they do that relates to the collaboration. Fourth, ask everyone on your team to go over what you wrote and add or revise. Finally, share with your partner organization and ask them to share their list in turn.

NAME	ABOUT THEIR STORY	ABOUT THEIR ROLE
Mary Johnson	Joined the team as member program manager in 2017. She has a lot of experience in theatre management and working in arts organizations. Loves to run and is trying to be vegan	Work with partner expert to develop and schedule a series of programs for our members. Mary will be focused on content development and structure for programs as well as scheduling.
1.		
2.		
3.		
4.		

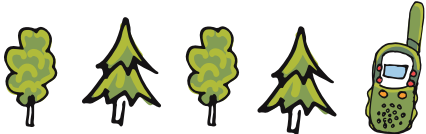


EXERCISE 5: HOW A GREAT PARTNER ACTS

We asked a group of PSO practitioners to describe how a great partner acts. Below are some of their responses. **Think about each behavior or quality and ask yourself, “How often do I do or demonstrate this?”** Try to be objective and focus on how you actually are day-to-day, not how you want to be. Imagine what a lovingly candid colleague might say about you. Once you finish, take a look at where you’ve marked the “Rarely” column. Ask yourself why you rarely do or demonstrate these items. Be honest about what might stand in the way for you. Then practice doing or demonstrating these in a current or next partnership.

	RARELY	SOMETIMES	OFTEN
Articulates their needs			
Assumes good intentions			
Balances self-interest with the greater good			
Brings a generosity of spirit toward partners and process			
Brings enough honesty to walk away and still stay friends			
Brings mutual respect and values what the other partner brings			
Clearly communicates			
Conveys their interests explicitly			
Defines roles and expertise			
Delivers on what they agree to do			
Does mid-way assessments of what’s working and what isn’t			
Does what they say they will do			
Gives credit where needed/due			
Has a “Yes And” approach—a thought partner			

	RARELY	SOMETIMES	OFTEN
Has a sense of “we,” not “I”			
Has grace and forgiveness			
Has radical generosity—not driven by what they get out of it			
Has the other person’s back			
Honors commitments			
Is frank about capacity			
Is honest and direct, especially when problems arise—a partner in problem-solving			
Is inclusive			
Is responsive and reliable			
Is willing to learn from you			
Listens and hears			
Makes good on promises			
Pays attention to detail			
Takes feedback			
Tries to be helpful			
Values the other’s expertise			



EXERCISE 6: WHAT'S YOUR PERSONAL TRUST RECIPE?

Forming trusted relationships was one of the ingredients that came up the most frequently in conversations about what partnerships need to succeed. One way to cultivate trust is to think about what makes you trust others. List five behaviors in others that cement your trust of them. Then ask yourself how often you exhibit those behaviors in partnerships. Imagine when you might get a next opportunity to try them.

TRUST-INSPIRING BEHAVIORS IN OTHERS	HOW FREQUENTLY I DO THEM		
	RARELY	SOMETIMES	OFTEN
<i>Open, direct conversation</i>			✓
1.			
2.			
3.			
4.			
5.			

EXERCISE 7: DEMONSTRATING ORGANIZATIONAL TRUSTWORTHINESS¹

This worksheet was created by the consulting and coaching organization *See What I Mean* to build trust in the grantee/funder relationship. It's also relevant to PSOs that want to demonstrate trustworthiness with their partners. In the boxes below, identify one way your PSO might demonstrate each trust-building quality through actions and behaviors, communications and symbols, and systems and policies.

	BENEVOLENT "Has my best interests at heart"	COMPETENT "Has the knowledge and skills needed to fulfill their role"	FAIR "Treats me in ways that are fair and equitable"	HONEST "Tells me the truth and gives me complete information"	OPEN "Is willing to be influenced by my needs and ideas"	RELIABLE "Does what they say they'll do"
Through actions and behaviors		<i>Show up prepared</i>	<i>Give credit where credit is due and needed</i>			<i>Meets work deadlines</i>
Through communications and symbols	<i>Ensure that public recognition includes logos and equal billing</i>					
Through systems and policies				<i>Meeting and communication schedule with timely notes recorded and shared</i>		

1 © See What I Mean 2018

QUOTES ON THE PERSONAL DIMENSION:



“Personal relationships are key to doing this work. When we all like each other, it’s easy to say, ‘Of course we will figure this out.’ When you get into a competitive or hierarchical mindset, it gets harder.”

“When I haven’t told partners about our culture and how we approach things with members, it’s come back to bite me. Without that, they naturally assume that their members are like your members and their organization is like your organization.”

“Discuss the depth of engagement at each organization.
Who does what?”

“Don’t be selfish...but be selfish. Don’t be afraid to start the conversation with self interest—here’s what we need to get from the partnership.”

“Get to know someone before you make the ask. It’s much better than cold-calling and asking to do something together.”

“If I had to choose my ideal partner, it would be somebody who values the relationship on a personal and organizational level. Not just as a revenue source. There have been times when I’ve been seen as just a member and revenue source and that doesn’t feel good.”

“The more you can get to know someone, the easier it is to be honest about what you need to ask what your partner needs.”

“Trust is key. We felt like we had each other’s back.”

“You shouldn’t have to twist arms. If that happens, it’s a red flag.”

“Don’t be afraid to say why you’re doing the partnership. If you need money, great. Say that!”

“Be fun to work with.”

DESIGNING THE PARTNERSHIP



Get Your Map & Supplies

In preparing this guide, we asked a group of PSO practitioners what kinds of tools and support would be most helpful to them in partnerships with other PSOs. Their top answer, by a significant margin: “collaboratively designing the partnership.” This underscores a point that might be intuitive in theory but can be forgotten in the heat of practice: a collaboration should be designed collaboratively! Practitioners in PSOs say this is important for the content of the partnership—the specific program, product, effort that you’re collaborating to create. But they say that a good, collaborative process might be even more important for the long-term relationship—and in turn future partnerships. Of course, if collaboratively designing a partnership were easy to do, practitioners wouldn’t have prioritized getting support to do it. The exercises in this section have been designed to provide that help.

KEYS TO SUCCESS

When collaboratively designing the partnership, what are the factors to account for?

Mutuality of benefit might be the most frequently mentioned key to success. One challenge that PSO partnerships encounter: how do you build a partnership when there can be an imbalance in what each partner is bringing to the table, in terms of organization size and resources? In conversations, many PSO leaders pointed to an answer: by focusing on mutuality of benefit. In short, even if there’s an imbalance in what goes into a partnership, be sure there’s a mutuality in what comes out of the partnership. Mutuality of benefit means that each partner feels they’re getting the value they need from the partnership, and that it’s worth the effort. That doesn’t mean the same benefits, they note. But there needs to be mutuality to it. There’s no magic metric for mutuality. It’s in the eye of each partner. If PSO leaders feel there’s a balance of benefits in a partnership, they tend to feel it was worth it. And if they feel there’s an imbalance of benefits, they tend to feel it wasn’t worth it.

At the same time, PSO leaders recognize that mutuality of benefit might not be achievable in every discrete partnership. That’s one reason why they so consistently point to the importance of establishing a trusted relationship between partners. That increases the likelihood of future partnerships. And future partnerships increase the likelihood that mutuality of benefit will be achieved over time.

Practitioners have identified a number of other critical variables to account for in the partnership design process, including:

- **Quality:** How do we collaboratively deliver the highest-quality effort or program for our members?
- **Value:** How do we approach the partnership so that each partner gets the value they need and feels satisfied with the process and outcome?

- **Money:** How do we pay for it and how do we get compensated for it?
- **Credit:** How do we make sure partners get fair credit for what they put into the partnership?
- **Efficiency:** how do we carry out the partnership using our time, talent, and treasure efficiently and responsibly?

During our preparation of this guide, we asked a group of PSO practitioners to imagine they were advising a PSO colleague who was about to embark on a partnership for the first time. We gave them a set of 10 factors. Which would they tell their colleague is the most important to partnership success? Their top three most important: clarity about goals and expectations, transparency about organizations' self-interest, and trusting relationships. And which factors would they tell their colleague are the most difficult to get right in partnerships? Their top three most difficult: clarity about roles and responsibilities, clarity about goals and expectations, and getting to shared purposes.

EXERCISE 8: CREATE A REALITY CHECKLIST²

<p>What do you want from your partnership? This exercise helps you identify what you want a partnership to accomplish and measure your progress. Think about a current or upcoming partnership. In the left column, list what you think an optimal partnership will help you to do.</p>	<p>Then, as you go through the partnership, use the columns at right to measure your progress in each category</p>
<p><i>Bring out creative ways of thinking through discussions, brainstorming and linking our work together</i></p>	<p><i>Great first meeting we came up with several new ideas and working on how to integrate them into the programming! We worked a few pieces into the program but needed to scale back due to capacity.</i></p>
<p>1.</p>	
<p>2.</p>	
<p>3.</p>	
<p>4.</p>	
<p>5.</p>	

2 This exercise is adapted from an exercise from The Giving Practice.

EXERCISE 9: WHAT CAPACITY DO YOU NEED...AND HAVE?

First, think about a particular current or potential partnership and what you need to engage effectively in that partnership. List your top six areas below. They could be tangible things like staff time, resources, specific competencies, and so on. Or they could be intangibles like patience, transparency, and so on.

Next, rate how much you have of each of those things by checking the appropriate box at right. "Low" = we have work to do before we're ready in this area. "High" = we're ready to go!

	LOW	MEDIUM	HIGH
<i>Staff time</i>	✓		
<i>Mission alignment and buy in from staff</i>			✓
1.			
2.			
3.			
4.			

EXERCISE 10: DESCRIBE YOUR CULTURE

First, think about a particular person in another organization that is a current or potential partner. How would you describe your culture to that person? Think of culture as the norms and behaviors that make up "how we do things around here," whether or not they're explicit in your organization. Try to be as objective and specific as possible. Think about the aspects of the cultures of other organizations you've worked with that have been different from your own.

Write an overall description of your culture here:

Next, think about a particular activity that will be part of your partnership. It could be a joint program, a convening, or an internal meeting between staff. Now think of a story of your organization doing that same kind of activity in the past (on its own, not with a partner). How would you describe what happened? What aspects of that past activity would be most instructive for your partner to get a glimpse into how your organization approaches the work?

Write your description of that past activity in the space below:

EXERCISE 11: DESCRIBE YOUR MEMBERS

Think about a current or potential partnership that could involve a partner organization working with your members or you working with a partner's members (and we recognize it could be both!).

First, imagine that you're going to design a program for your partner's members. What questions would you have about those members? They might be about any number of things—organization types, geography, politics, tone, expectations, and so on. In the left column below, list those questions.

Next, in the right column below, write down how you would answer those questions about your own members.

Your questions about your partner's members	How you would answer those questions about your own members
<i>How will they engage with the subject of RED? Do they seem ready for the conversation?</i>	<i>My members will self-select in a usual group that are very open to the conversation and others that are curious and want to learn what we are thinking about but about half will not engage</i>
1.	
2.	
3.	
4.	
5.	

EXERCISE 12: CREATE A USER'S MANUAL FOR YOUR PSO³

All PSOs are unique in one way or another. How to make sure your partner knows your PSO's particular quirks, style and ways of working? Create a user's manual about your own PSO. This is a short set of tips for the best way to partner with you that you can provide your partner. In the right column below, provide descriptions of your PSO based on the categories in the left column.

CATEGORY	DESCRIPTION OF OUR PSO
1. Our style	<i>Fast-paced, transparent and generous but striving for excellence in all we do</i>
2. What we value	
3. How best to communicate with us	
4. How to best help us	
5. Our scheduling and deadlines	<i>Bi-weekly newsletter; 30 day turnaround on payments;</i>
6. One thing we wish partners really got about us	

³ This exercise is adapted from an idea documented in *Quick and Nimble: Lessons from Leading CEOs on How to Create a Culture of Innovation* by Adam Bryant and an adaptation of that idea by Abby Falik, described in her LinkedIn post of July 27, 2017.

EXERCISE 13: DO AN MOU—A “MEMORANDUM OF US”

You enter into contracts with vendors but in partnerships, you want there to be a relationship that values all members of the partnership and sees the opportunity as important in service to your members and missions. So create a Memorandum of Us that tells the story of your partnership, holds you accountable but most importantly outlines each other’s expectations clearly and is transparent to yourselves as well as others connected to you. In the columns below, write your PSO’s expected role and your partner’s expected role in each of the six partnership categories. Use these specifics to craft your MOU.

CATEGORY	YOUR PSO’S ROLE	YOUR PARTNER’S ROLE
Design/Program	<i>Review content and make adjustments for your members and expected audience</i>	<i>Act as content expertise and provide resources for members as well as programming</i>
Communications		
Marketing		
Delivery		
Evaluation		
Expenses		
Revenue		

EXERCISE 14: DO A “PRE-MORTEM”⁴

This exercise is a great way to anticipate what could go wrong by imagining it already has.

Imagine it’s one year in the future, and the partnership has failed. Why did it fail?

List all the reasons that come to mind below. Then think about how you can design the partnership now to prevent those things from happening.

WHY DID IT FAIL?	HOW CAN YOU KEEP IT FROM HAPPENING? YOUR PARTNER’S ROLE
Poor communications about who was doing what	<i>Develop plan for communications up front and execute MOU</i>
1.	
2.	
3.	
4.	
5.	

⁴ Based on “Performing a Project *Premortem*,” by Gary Klein, *Harvard Business Review*, September 2007

QUOTES ON DESIGNING THE PARTNERSHIP:



“There needs to be an honest conversation about what is valued.”

“Be clear about expectations from the start.”

“Define the value you get. Be explicit about it. Sometimes it’s time. Sometimes it’s money.”

“Double the time you think it’s going to take. And be honest with yourself and your partner if you’ve got the time or not.”

“Having an MOU is important as an expression of commitment.”

“Think about what your deal-breakers are.”

“We spend a lot of time telling partners what we’re about. For example, we don’t charge fees. We don’t pitch members. And so on. That helps our partners when we’re doing a joint program.”

“What do we mean when we say partnership? There needs to be alignment in values and mission.”

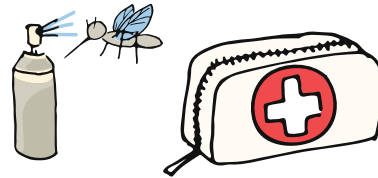
“Making a partnership equitable starts with being clear about self-interest. And making it equitable doesn’t mean making it even. They may need registration fees and I may need to be able to shape content. Branding might be critical to them but not a big deal to us. It doesn’t mean halvesies.”

“There’s a history of sharing for free in our network. But PSOs also want to make money on programs we partner on. We want to get compensated for what we contribute. And we want to be good partners. It’s a dilemma.”

“Even simple asks sometimes end up not being so simple.”

SHAPING THE PARTNERSHIP AS YOU GO

Walk the Trail



Be sure to stop along the way to appreciate the scenery and your partnership accomplishments. Acknowledge any forks in the trail that may have gotten things off track and readjust. Ask yourself these questions:

- Does everyone still have enough resources and supplies to get to the end of the trail successfully?
- Has the climate changed requiring different hikers to adjust or new tools to accomplish the tasks at hand?
- Will it take longer than expected to get to where we are headed?

These are things that need to be checked as you move down the path of your partnership. Refer back to your MOU often and jointly reaffirm your roles and deliverables to ensure safe passage for all.

Ways to get back on the trail if you get lost, according to partnership veterans:

1. Ask the question and voice the worry. Don't keep it to yourself.
2. Gently push for clarity on the what and when of deliverables.
3. If there's a problem or miscommunication, get your partner on the phone or video as soon as possible. Don't wait.
4. Be open with your partner about what your personal "hot buttons" are (see page 36 under the resource guide) or your organization's trip wires are. And when a hot button is pushed or trip wire tripped, say something.
5. Look for opportunities to affirm the why of the partnership.
6. Don't take it personally. Remember the fundamental attribution error (see page 34 in reference guide) and try to learn and think about the situational factors on your partner's side before doubting their commitment.
7. Some big collaborations can get tripped up by seemingly small missteps. One type of misstep frequently mentioned in conversations with PSO has to do with recognition, on both personal and institutional levels. This can happen for reasons other than ego. Many PSO practitioners can overreach on credit because they feel they have to show their funders and their board they're doing good work. And PSOs can naturally feel an undercurrent of competitiveness even with long-time partners or PSOs that don't overlap with their members or markets at all. Take care to give credit, express appreciation, and account for their brand identity as much as yours.
8. Have an exit strategy. Recognize that, despite good intentions, partnerships fail. If that happens, remember that specific partnerships can fail but the relationship can continue.

Think about what would make you think of someone else as uncollaborative? Remember that we can tend to focus more on intentions when it comes to explaining ourselves and behaviors when it comes to explaining others.

EXERCISE 15: PLAN FOR OBSTACLES

We asked PSO practitioners to draw maps of the partnership trails and identify where obstacles might get in the way. Below we list some of the common obstacles that emerged. One way you can plan how you adapt to these obstacles is by using “implementation intentions.”⁵ These are intentions framed in if/then statements through which you link critical situations you might encounter (the “if” part) with behaviors you want to exhibit to achieve your goals (the “then” part). In this exercise, for each obstacle, write down your “then” statement—what you could or should do if that obstacle arises in your partnership.

IF THIS OBSTACLE ARISES...	...THEN WE COULD/SHOULD RESPOND BY...
Conflicting priorities	<i>Develop plan for communications up front and execute MOU</i>
Distraction	
Funders change minds	
Lack of boundaries	
Lack of capacity	
Lack of member participation, interest	
Lack of resources	
Lack of trust	
Losing track of scope	
Miscommunication	

⁵ See “Implementation Intentions: Strong Effects of Simple Plans” by Peter M. Gollwitzer, *The American Psychologist* 54 (1999) Page 28, Exercise 16, footnote after “Assessment” in the exercise title: See www.grantcraft.org/content/guides/funder-collaboratives/

EXERCISE 15: PLAN FOR OBSTACLES

Not following agreed-upon process	
Perceptions of unfairness	
Power dynamics	
Staff transitions	
Time challenges	
Unresolved tensions	

EXERCISE 16: MID-COURSE ASSESSMENT⁶

This exercise is adapted from a worksheet from the GrantCraft guide “Funder Collaboratives: Why and How Funders Work Together.” Use it during a partnership to identify issues and get on the right track.

INDICATOR OF SUCCESS	YES/NO	HOW CAN WE IMPROVE?
Clarity about end goals, outcomes and strategy		
Well-defined success measures and progress benchmarks		
Clear understanding of the time and resource commitments require		
Enough money to get the job done		
Good attendance and participation at meetings and on phone call		
Mutual trust and respect among members		
Mechanisms to bring in new members and adjust our processes to accommodate growth		

⁶ See www.grantcraft.org/content/guides/funder-collaboratives/

EXERCISE 16: MID-COURSE ASSESSMENT⁶

Open and honest communication		
Willingness to address interpersonal or systemic problems when they arise		
Streamlined and efficient decision-making—and a record of producing decisions that members feel are fair		
Nimbleness and flexibility when opportunities arise		

QUOTES ON SHAPING PARTNERSHIP AS YOU GO:



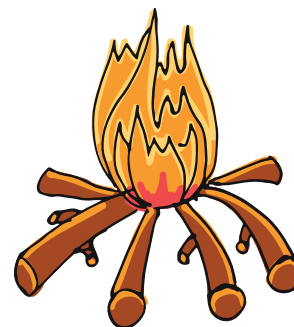
“Sometimes there are too many cooks in the kitchen. You need to be explicit: Who’s doing what? And who does the buck stop with?”

“I try to understand what their members are used to expecting and how that might be different from what our members are used to expecting. It can go wrong if you show up expecting one thing and you find another.”

“Do standing check-in calls. Those work well. If you’re trying to get a response from your partner and then you don’t, it can be too late.”



REFLECTING ON WHAT YOU LEARNED



Talk at the Campfire

You've finished your trip. Now it's time to reflect so you can be ready for the next adventure. Did you reach your goals? Did things go as you expected? What did you learn that you can bring to upcoming partnerships?

EXERCISE 17: REVISITING YOUR REALITY CHECKLIST					
Remember exercise 8? In this exercise, you'll revisit your list and measure your progress against each. First, transfer the list you made in that exercise to the left column below. Then, using the right columns, put a check mark in the appropriate cell.					
AN OPTIMAL PARTNERSHIP WILL HELP US TO...	MEASURING OUR PROGRESS				
	NOT THERE YET		WE GOT THERE!		
	1	2	3	4	5

EXERCISE 19: LOOKING BACK ON EXPECTATIONS

Thinking about progress against expectations is a good way to learn for the next partnership. In the columns below, list the aspects of the partnership that were less than expected, what you expected, and better than expected.

LESS THAN EXPECTED	EXPECTED	BETTER THAN EXPECTED

EXERCISE 20: LEARNING WITH YOUR PARTNER

This exercise will help you learn with and from your partner. Answer Questions 1 through 4. Then share with your partner, and ask your partner to share their answers with you.

1. If we had to work on building one partnership muscle for our next partnership, what would it be?

2. If our partner had to work on building one partnership muscle for their next partnership, what would it be?

3. What is one way that our partner helped us get better at partnership?

4. What do we think is one way we helped our partner get better at partnership?

STORIES FROM THE TRAIL

Do you have a partnership story to tell? Answer the questions below, take a photo, and email it to maggie@unitedphilforum.org We hope you will continue to share these stories of partnership with the Forum to add to our resources for the field as well.

Who were the partners?

Why did you create this partnership or collaboration?

What did you do?

What changed or was there a turning point or important shift along the way?

What did you accomplish?



“There needs to be mutual appreciation between national and regional PSOs. Nationals need to appreciate that regionals know their members and how best to frame and arrange a joint program. Regionals need to appreciate the expertise that nationals bring to the table.”

STAY IN SHAPE

Reference Guide For Trailblazers



Here are ideas from scholarship about life on the trail.



1. FOLLOW FOUR PILLARS OF EFFECTIVE ‘TEAMING’.

[From *Teaming*, by Amy Edmondson]

According to Edmondson, successful collaboration, or “teaming” as she calls it, relies on four key ingredients:

(1) Speaking Up. Teaming depends on honest, direct conversation between individuals, including asking questions, seeking feedback, and discussing errors. “When people are willing to engage with each other directly and openly,” she writes, “they are better able to make sense of the larger shared work and more likely to generate ideas for improving work processes.”

(2) Collaboration: Teaming requires a collaborative mindset and behavior to drive the process. “Collaboration is a way of working with colleagues that is characterized by cooperation, mutual respect, and shared goals,” she writes. “It involves sharing information, coordinating actions, discussing what’s working and what’s not, and perpetually seeking input and feedback.”

(3) Experimentation: “Teaming involves a tentative, iterative approach to action that recognizes the novelty and uncertainty inherent in every interaction between individuals. Experimentation means expecting not to be right the first time....Experimentation behavior is a way of acting that centrally involves learning from the results of action.”

(4) Reflection: “Teaming relies on the use of explicit observations, questions, and discussions of processes and outcomes. This must happen on a consistent basis that reflects the rhythm of the work. Reflection is the habit of critically examining the results of actions to assess results and uncover new ideas.”

2. KNOW WHAT CAN STAND IN THE WAY.

[From *Teaming*, by Amy Edmondson]

“Serious work means serious tension,” Edmondson writes. Groups can experience that tension in a number of ways:

(1) “People don’t always get along. It’s far easier for an individual to have a clear and well-bounded task to do over and over again than to figure out how to carry out more complex and interdependent work with others.”

(2) “Silence is easier than speaking up. Silence stymies teaming. Silence means good ideas and possibilities don’t bubble up, and problems don’t get addressed.”

(3) **“Shhhh, here comes the boss.** Research shows that hierarchy, by its very nature, dramatically reduces speaking up by those lower in the pecking order. We are hard-wired, and then socialized, to be acutely sensitive to power.”

(4) **“Disagreement.** Speaking up brings challenges, too. As soon as people speak up and communicate freely with one another, there is bound to be disagreement and sometimes seemingly irresolvable conflict.” “The problem with disagreement is not that it occurs; the problem is the sense making in which people engage when it occurs—‘she doesn’t get it’ or ‘he’s just out for himself.’”

(5) **“Naive Realism.** We are all prone to naive realism, a term coined by psychologist Lee Ross, which is a person’s ‘unshakable conviction that he or she is somehow privy to an invariant, knowable, objective reality—a reality that others will also perceive faithfully, provided that they are reasonable and rational.’... One outcome of naive realism is that people tend to see their own views as more common than they really are, leading them to falsely assume that others share their views....Social psychologists call this the false consensus effect. And such assumptions usually go unnoticed—until unexpectedly refuted when someone disagrees.”

(6) **“The Fundamental Attribution Error.** The term describes our failure to recognize situational causes of events and our tendency to over attribute individuals’ personality or ability as likely causes. An outgrowth of this cognitive error is that we tend to explain others’ shortcomings as related to their ability or attitude, rather than to the circumstances they face. That is, we blame the PEOPLE for things that go wrong—not the situation.”

3. USE COLLABORATION FOR LEARNING.

[From *Teaming*, by Amy Edmondson]

“Teaming, by its nature, is a learning process,” she writes. “No sequence of events will unfold precisely the same way twice when people must interact to coordinate ideas or actions, and so participants in such a process are always in a position to learn....Learning in teams involves iterative cycles of communication, decision, action and reflection....People need to develop and use new capabilities for sharing crucial knowledge quickly...They must learn to ask questions clearly and frequently.” Edmondson encourages teams to focus not only on “organizing to execute” but “organizing to learn,” which is a “radically different mindset that focuses less on ensuring a process is followed than on helping it evolve.” She talks about a number of learning behaviors within teams, including

(1) **Asking questions;**

(2) **Sharing information;**

(3) **Seeking help;**

(4) **Experimenting with unproven actions;**

(5) **Talking about mistakes;**

(6) **Seeking feedback.”**

4. USE COLLABORATION FOR INNOVATION.

[From *Group Genius: The Creative Power of Collaboration*, by Keith Sawyer]

“We’re drawn to the image of the lone genius whose mystical moment of insight changes the world,” Sawyer writes. “But the lone genius is a myth; instead, it’s group genius that generates breakthrough

innovation.” And it’s not just any groups. The book cites research that show how teams interact predicts which teams do well. The key is if a team is improvisational. In turn, Sawyer identifies seven characteristics of creative, improvisational teams:

(1) Innovation emerges over time, not in single flashes;

(2) Successful teams practice deep listening;

(3) Team members build on each other’s ideas;

(4) Only afterward does the meaning of each idea become clear;

(5) Surprising questions emerge;

(6) Improvised innovation is inefficient, with “as many misses as hits;”

(7) Innovation emerges from the bottom up. The most innovative teams spend less time planning and more time prototyping. They engage in short bursts of planning that alternate with improvisation. They distribute design activities throughout the execution process.

5. MAKE INFORMATION SYMMETRICAL.

[From *Smart Collaboration*, by Heidi K. Gardner]

While this book focuses on collaboration within professional service firms, it has some useful ideas on what smart collaborators do. “Smart collaboration is a means to an end,” Gardner writes, “rather than an end in itself.” Seasoned collaborators begin by recognizing why they’re collaborating. They also aim to “make information symmetrical” across the collaboration. “Tackling the symmetrical knowledge problem requires activities that often feel forced or artificial, like scheduling time for ‘spontaneous’ interaction, or investing in technologies to create virtual water coolers. These shared experiences increase the feeling of ‘we,’ and the resulting trust and familiarity are vital when a crisis erupts. Give (and take) a virtual tour to provide context. The more you and your distant teammates know about each other’s environment, the better you will be able to make sense of one another’s behavior.”

6. WATCH OUT FOR YOUR DEFENSES.

[From *The Bumpy Road to Collaboration*, by Carole Lévy]

“This book is especially for...people who, like myself, passionately love collaboration, yet consistently botch it up.” A big obstacle, she writes, is that we often behave defensively instead of collaboratively. We all have “trigger points” that lead us to get into a “box,” where we are “at the mercy of others and external circumstances” “use fears and strategies to ward off perceived threats,” and “have limited perception of reality and don’t see all our options.” Lévy explores a number of ways our defenses get the best of us, including “being overly independent and guarded,” “hiding weaknesses,” “wanting to be the star,” competition, envy, mistrust and control. How to overcome these? Choose to be “at the source,” not “at the mercy.” Being at the source means having “a state of clarity where I’m a fallible human being with an open heart and a big appetite for life...When I’m at the source, I’m emotionally calm and grounded, connected to others, with clear boundaries, authentic and fearless, creative and resourceful.” More specifically, Lévy identifies a number of steps to take, including:

(1) Practice self-awareness;

(2) Clarify what you don’t want;

(3) Have empathy for yourself and others;

- (4) Identify your “hot buttons—what triggers us and leads us into our boxes;”
- (5) Have a sense of humor;
- (6) Rehearse difficult conversations;
- (7) Say “so what?” to fears; and
- (8) Reconnect with goals and aspirations.

7. CULTIVATE THESE QUALITIES OF AN IDEAL PARTNER.

[From *Changing Trends in Business-NGO Partnerships*, by M. Bobenrieth and D. Stibbe]

The authors interviewed hundreds of participants in business-NGO partnerships and asked them to identify attributes of an ideal partner, ranked in order of importance:

- (1) Brings clear value propositions—understands the partner, learns about the partner, speaks the language of the partner.
- (2) Collaborates—cooperates with others.
- (3) Communicates with excellence—has clear, simple, and solid reporting mechanisms, communicates well internally and externally.
- (4) Creates synergy—beyond bringing a clear value proposition, an ideal partner is able to actively develop a common goal and a win-win situation, not a ready-made product.
- (5) Is transparent—an ideal partner is willing to have the difficult conversations.
- (6) Is strategic—thinks strategically about partnerships, is clear and focused, has a long-term view, is flexible, and can evolve with the partnership.
- (7) Is knowledgeable—an ideal partner has knowledge, experience and time to invest in the relationship.
- (8) Is proactive—an ideal partner comes with ideas that make sense for the partner and can be easily understand, takes initiative, is creative and generates excitement.
- (9) Create profile and network—an ideal partner has good visibility and public profile and understands the importance of networks.
- (10) Is flexible—an ideal partner adjusts and sees flexibility as essential.

8. SEEK FEARLESS PARTNERSHIP.

[From *The Fearless Organization*, by Amy Edmondson]

“Edmondson’s book is about creating psychological safety in the workplace, but its ideas are applicable to collaboration across organizations as well. Substitute “partnership” for “workplace” in the following ideas and findings, and the value still holds. “In my research over the past 20 years,” she writes, “I’ve shown that a factor I call psychological safety helps explain differences in performance in workplace.... Psychological safety is broadly defined as a climate in which people are comfortable expressing and being themselves. More specifically, when people have psychological safety at work, they feel comfortable sharing concerns and mistakes without fear of embarrassment or retribution.” Edmondson says that psychological safety “emerges as a property of a group” and talks about research that shows that teams vary “wildly” in whether people feel able to talk about mistakes. She presents a “Leader’s Tool Kit for Building Psychological Safety” that includes the following moves:

- (1) Setting expectations about failures, uncertainty and interdependence;
- (2) Identifying what's at stake, why it matters, and for whom;
- (3) Practicing inquiry, with good questions and intense listening;
- (4) Creating forums for input;
- (5) Reframing failure as a source of learning;
- (6) Emphasizing uncertainty, reminding people of the need to be curious;
- (7) Emphasizing interdependence, reminding people that they're responsible for understanding how their tasks interact with other people's tasks;
- (8) Adopting a humble mindset when faced with a complex, dynamic and uncertain world;
- (9) Responding productively to risk-taking by expressing appreciation and destigmatizing failure.

9. AVOID COLLABORATION OVERLOAD.

[From *Collaboration without Burnout*, by Rob Cross, Scott Taylor, and Deb Zehner]

In their research, the authors used network analyses to identify “efficient collaborators—people who work productively with a wide variety of others but use the least amount of their own time.” They found best practices in three categories: beliefs (“understanding why we take on too much”); role, schedule and network (“eliminating unnecessary collaboration to make time for work that is aligned with aspirations and values”); and behavior (“ensuring that necessary or desired collaborative work is as productive as possible”). They identified two types of overload: a “surge” or a “slow burn.” And they observed practical moves taken by efficient collaborators, who “remember that saying yes to something always means saying no to—or participating less fully in—something else;” “think carefully about their areas of expertise and determine when they do, or don't, have value to add;” make meetings “more productive by, for example, asking the leader to circulate an agenda or a pre-read before the gathering and a short email on agreements, commitments, and next steps afterward;” “consider virtual collaboration tools for work that is exploratory (defining a problem space or brainstorming solutions) or integrative (when people with varying expertise, perspectives, or work assignments need to produce a joint solution);” and “for one-on-one interactions, always consider whether they are consuming their counterpart's time efficiently.”

10. BE A GIVER.

[From *Give and Take*, by Adam Grant]

Grant explores research on three different preferences for reciprocity. Takers like to get more than give and put their own interests ahead of others' needs. Givers prefer to give more than get and pay more attention to what others need from them. And in the workplace, where give and take can become more complicated, many adopt a third style: Matchers, looking for an equal balance of giving and getting. “In this book,” Grant writes, “I want to persuade you that we underestimate the success of givers.” He does so by exploring these ideas and findings:

- (1) “Successful givers recognize that there's a big difference between taking and receiving. Taking is using other people solely for one's own gain. Receiving is accepting help from others while maintaining a willingness to pay it back and forward.”
- (2) “People who prefer to give or match often feel pressured to lean in the taker direction when they perceive a workplace as zero-sum.”

(3) “In networks, new research shows that when people get burned by takers, they punish them by sharing reputational information.”

(4) “A defining feature of how givers collaborate is that they take on the tasks that are in the group’s best interest, not necessarily their own personal interests.”

(5) “Extensive research reveals that people who give their time and knowledge regularly to help their colleagues end up earning more raises and promotions in a wide range of settings.”

(6) “Responsibility bias: exaggerating our own contributions relative to others’ inputs. It’s a mistake to which takers are especially vulnerable.” One factor in responsibility bias is “information discrepancy. We have more access to information about our own contributions than the contributions of others.”

(7) “The key to balancing our responsibility judgments is to focus our attention on what others have contributed....All you need to do is make a list of what your partner contributes before you estimate your own contribution.

(8) “The key to balancing our responsibility judgments is to focus our attention on what others have contributed....All you need to do is make a list of what your partner contributes before you estimate your own contribution.

(9) Try to overcome the “perspective gap: when we’re not experiencing a psychologically or physically intense state, we dramatically underestimate how much it will affect us.” We need to find ways to put ourselves “in other people’s shoes.” One example of the perspective gap is the gift registry. Grant cites research into how senders and receivers react to registry gifts and unique gifts—i.e. gifts that senders pick on their own rather than choosing a gift from the registry. The researchers “found that senders consistently underestimated how much recipients appreciated registry gifts,” and overestimated how much they’d like the unique gifts they chose. “Why? Research shows that when we take others’ perspectives, we tend to stay within our own frames of reference, asking ‘How would I feel in this situation?’” “To effectively help colleagues, people need to step outside their own frames of reference....They need to ask, ‘How will the recipient feel in this situation?’”







UNITED PHILANTHROPY
FORUM

A network for the common good

1020 19th Street NW
Suite 360
Washington, DC 20036

(888) 391-3235
info@unitedphilforum.org
[@unitedphilforum.org](https://www.unitedphilforum.org)
www.unitedphilforum.org