

Fundamental Concepts of Regional Partnering

What is a regional partnership?

Partnerships are formed when two or more people, groups of people, or organizations reach either formal or informal agreement to work cooperatively to achieve common goals. Regional partnerships add a geographic component to this cooperation and imply both larger numbers of partners and broader definitions of common goals. But to truly understand what a regional partnership is you must first understand the underlying concepts of partnership.

Why do people partner?

In his poem “Mending Wall” Robert Frost provides an excellent example of the most fundamental of partnerships. After the winter ice and snow have done their damage and are gone, two farmers come together, each on his side of the stone wall that marks the boundary of their lands and keeps their farm animals from roaming. With very little discussion they walk along the length of the wall, replacing the stones that fell from the wall in the winter. As the wall runs through a forest and orchard where there is no need to restrain farm animals, one farmer questions why the wall exists and why they go to the trouble of rebuilding it every year in that area. The other farmer replies simply “good fences make good neighbors” and they toil on.

In this scenario, the two partners share a common goal, they each provide resources (work and time) to the effort, they accomplish more together than either could accomplish alone, they address common issues within the framework of the partnership, they communicate clearly with each other about all aspects of the partnership, and in the end they produce value for each other. These are the reasons people partner.

Organizations partner for exactly the same reasons. The five fundamental reasons for partnership are:

- Partnerships create mutual value that is greater than what the partners could individually achieve – even to the extent of seeking Bold Goals
 - o Each partner comes away from the effort with something of value
 - o The overall partnership multiplies each partners’ contribution to produce additional value
 - o Bold Goals are not just the result of the sum of the partners individual capacities and contributions, but goals that are possible because of the leverage of those capacities and contributions
 - o This concept was expressed most succinctly by Aristotle in his thought “the sum of the whole is greater than the sum of its parts,” a

concept refined by R. Buckminster Fuller to become the basis of “synergy”

- Partnerships leverage resources
 - o Each partner contributes time, treasure, and other resources to the effort
 - o Partners often contribute unique capabilities unavailable elsewhere, such as the contribution of planning and zoning authority by local government agencies
 - o The sum of those resources is necessary to achieve the goals the partners set for the partnership
- Partnerships address common issues
 - o The partnership provides an effective way to address issues and meet needs that are not met in other ways or by other groups
 - o The partners can agree on what their common needs are, and understand both the potential and limitations of what they can accomplish together
- Partnerships provide communications forums
 - o The psychological implications of making even small commitments to each other create a greater willingness to talk about issues and problems
 - o Sometimes problems and issues can be overcome simply by creating communication channels that do not exist outside the partnership
- Partnerships can achieve “Bold Goals”

What does the perfect partnership look like?

The best organizational partnerships are made up of entities that have clear visions of what they want to accomplish and strong individual missions. They can communicate those visions and missions succinctly and understand where they coincide and where they diverge. They recognize the value that others bring to the partnership, and can share the burden, the responsibility, and the decision making for the effort. Most importantly, they all share an understanding that they have a common need or needs that are not being met in other ways, and agree on a common vision of how to meet those needs.

While the organizations may bring widely differing capabilities and resources to the partnership, each makes an investment in the partnership that is significant from their point of view, and all partners understand the degree of each other’s investment. They make a strong commitment to provide resources to the effort as long as is necessary to achieve their goals, and they recognize that they need each other to achieve their common vision. They work in concert to produce benefits not just for their own organization, but for their partners and for the combined partnership (Bold Goals.)

The best organizational partnerships enable strong and clear communications between partners, and provide clear statements of purpose and goals for communication to the public and other interested parties. The actions and deliberations of organizational partnerships should be fully transparent to any regulatory or legal bodies that may exercise oversight over the partners in some way (such as the Internal Revenue Service in the case of business or nonprofit organizations) and provide a large degree of transparency to the public. However the partnership should also provide mechanisms for private and privileged communications among partners that are used only when needed to protect the legitimate individual or common proprietary interests of the partners.

It is the rare partnership that does not need a facilitator or leader. While responsibility and power should be shared equally among partners, leadership always occurs in groups. The question is: does the leadership provided help the group reach its goals, or simply empower one member or faction of the group. Facilitators are often vital to helping partners fully understand each other, and can play a critical role in the definition of common visions and goals. The challenge for either a naturally emerging leader or a group facilitator is in maintaining not just the appearance but the reality of an even handed approach to making sure that each member's voice is heard and their ideas and opinions are respected and given the weight they merit.

When should an organization seek partnerships?

Partnerships created just for the sake of partnering are doomed to failure. Having regular meetings to discuss issues or build relationships is often mistaken for partnering. Organizations should be circumspect about creating partnerships, and should understand that they imply a level of commitment, mutual respect, and trust that is greater than a typical relationship. Partnerships should only be created when:

1. There is a definite need felt by multiple organizations that is not met by other means;
2. An already existing partnership cannot be changed to meet the need;
3. The potential partners each have something to contribute to meeting the need;
4. The potential partners are each willing to make a commitment of time and resources to the partnership;
5. The potential partners can clearly define and communicate both the benefits they will receive individually from the partnership, and the common vision and goals of the partnership.

Wanting to use OPM (other people's money) to support the mission of your organization is NOT a good reason to partner. If an organization lacks the resources necessary to accomplish some fundamental aspect of its mission, it should either seek to get those resources from other sources in an honest and upright manner, or

consider adjusting its mission and goals to more realistic levels. However if there is an aspect of its mission that corresponds or overlaps with one or more other organizations, it may be legitimate to seek to either transfer responsibility for that mission entirely to those other organizations or develop a partnership to cooperatively achieve mission success.

What are the steps in creating a regional partnership?

As stated above, the term “regional partnership” implies a geographic element to defining which organizations should be members of a partnership and what the vision and goals of the partnership should be. The geographic component can be defined in many different ways. Political boundaries, watersheds, common economic and demographic circumstances, ecosystems, common language and culture, and many other factors can be used to define a “region.” Some of the most common examples of regional partnerships include political regions, such as councils of government, metropolitan planning organizations, and natural resource conservation and development councils, watersheds such as watershed restoration associations, and economic partnerships such as the Austin-San Antonio Corridor Council.

There are many steps to creating regional partnerships, but successful efforts require particular attention to these:

1. Do the research
 - a. Is there a need? Do you feel a need, and do other people and/or organizations share that perception? Internet searches alone are not enough. Initiators of partnerships should meet individually with a laundry list of potential stakeholders and ask direct questions about their opinions.
 - b. Is there an existing partnership already filling the need? Too often people perceive a need and say “we should start a group” when a group already exists that is addressing that need either directly or indirectly. Again, internet searches provide a start but are inadequate to fully research the question. Face to face meetings, teleconferences, and detailed email exchanges are the best methods of inquiry.
 - c. Is there an existing partnership that can be expanded to fill the need? Does it already bring the key players together? Often a partnership already exists that is indirectly or tangentially addressing the perceived need, or is capable of addressing the need with minor adjustments to its vision and goals. Again, direct inquiries are required to determine if the partnership is both capable of and willing to change or add to its mission, and if it is willing to expand to accept all the stakeholders necessary. The biggest obstacles to these actions are poor communications and issues of control, both of which are discussed below.

- d. Do the people and organizations being invited to partner share similar or complementary missions? For example, in a partnership whose purpose is to influence land use patterns for a particular outcome partner organizations with similar missions may be a neighborhood association and a municipal parks department, while a metropolitan planning organization would have a complementary mission of transportation planning that could directly influence land use decisions.
 - e. Do the people and organizations being invited to partner share similar values? In the land use scenario above a conservation organization partner may see all land speculators and developers as opponents. However many developers have a strong conservation ethic, and seek to balance the impacts of the built environment with the natural resources of the land and the economic benefits that accrue from land development. The only way to know for sure is for the various partners to communicate respectfully, directly, and openly.
2. Be willing to invest both time AND money
 - a. The best partnerships are those in which all the partners contribute equal amounts of time, energy, and treasure.
 - b. It becomes very obvious to potential partners when your real motivation is simply to acquire control of their resources for your own ends. This is a recipe for failure.
 - c. Seeking third party facilitation or pooling resources to engage a facilitator is a wise choice.
 3. Give up control
 - a. Ego is a powerful motivator, and pride of authorship of an idea is difficult for many people to give up, but the most effective partnerships are those in which every partner feels that they “own” a real piece of the decision making, effort, and reward.
 - b. People are often unaware that ego and control issues are influencing them. This is why third party facilitators are so valuable to partnering efforts.
 - c. Giving up control does not mean that you must not take a leadership role. Good leaders set the example by actively seeking input from their partners, stating their positions clearly, and knowing how to compromise without giving up on their values.
 4. Clearly state and agree upon the purpose of the partnership
 - a. In his book *The Collaboration Challenge: How Nonprofits and Businesses Succeed Through Strategic Alliances* (2000, The Peter F. Drucker Foundation for Nonprofit Management,) James E. Austin of the Harvard Business School states: “Above all, collaborators need to be clear about the purpose of joint undertakings...The rigor and discipline that companies apply to clearly targeted business

investments are also vital to the crafting of social purpose partnerships.”

- b. The very first meeting of the key partners should be focused on one thing: defining and communicating that purpose. If the key partners cannot reach consensus on that central point, we know one of two things:
 - i. Either the partnership would be a waste of time,
 - ii. Or the right partners are not yet at the table
 - c. Every partner needs to understand and support the purpose of the partnership. More importantly, they need to understand why they are being asked to participate and what is expected of them. In addition, they need to be able to clearly communicate the *why* and *what* within their own organizations.
5. Set the Mission and seek the Bold Goal
- a. The purpose expresses *what* the partnership is intended to do, and the mission expresses *how* it will go about doing it. A clear and unambiguous mission is vital to the ability of organizations to embrace a partnership, and is especially important in identifying the resources each partner must bring to the effort.
 - b. Goals provide ways for the partnership to mark progress and measure success. Keeping in mind the potential synergies of bringing multiple partners with a wide array of skills, talents and resources, partnerships should seek to set at least one goal that will truly test the limits of that synergy. Once that Bold Goal is set, intermediate goals, timelines, and responsibilities may be identified.
6. Creation and Demonstration of value
- a. People often confuse true partnership with an ongoing series of meetings whose purpose is simply to communicate and coordinate independent actions of various individuals or organizations. While these types of efforts are essential, they are not partnerships in the purest sense of the word. True partnerships combine efforts and resources to produce a commonly agreed outcome.
 - b. It is important that partnerships demonstrate the value they are creating both internally and externally. Each partner should see some return for their efforts and commitment. They should also be able to communicate the greater value they are producing to other potential partners, agencies that have some legal or practical interest in the outcomes produced, and the general public.
7. Dynamic Partnering
- a. Dynamic partnerships are those in which the partners actively seek not just to cooperate but to truly *collaborate* with each other. These partnerships are capable of changing rapidly to respond to changing conditions, and of knowing both when they should evolve into

something new or different and/or when they are no longer necessary.

- b. The ultimate key to building a dynamic partnership is clear and free communication between partners. If partners constantly seek to avoid conflict or communicate through innuendo, implication, and body language they are NOT communicating. Again, facilitators can add great value to partnerships through both active listening and aggressively challenging people to open both their minds and their hearts to truly hearing each other.
- c. In *The Collaboration Challenge* Austin speaks to the importance of the concept of “Continual Learning” in dynamic partnerships: “Learning about one another’s businesses and operations not only builds rapport and enhances communication between partners but can also lead to the identification of new collaboration opportunities.”
- d. A basic tenet of this concept is making sure that partners understand how to introduce new ideas, opportunities, and challenges to the group.
- e. One function of Continual Learning is the ability to understand the ebb and flow of competing needs in organizations. Economic cycles, changes in personnel, unexpected opportunities, changes in constituencies, and many other factors can influence both the capacity of partners to contribute and their degree of commitment to the partnership. Understanding, acknowledging, and seeking to work with each other to smooth out these fluctuations are examples of Dynamic Partnering in action.

How long should a partnership last?

Creating a partnership does not necessarily involve creating and incorporating a formal structure or organization that takes on a life of its own. Partnerships should only last as long as there is a need to partner and they are functioning well to meet that need. Organizations who join partnerships should only do so if they are willing to commit the time and resources necessary to meet the need, and they should only remain in partnerships as long as the partnership is producing a return for the organization.

Too many partnerships exist today that have outlived their original purpose and have failed to redefine what they hope to achieve. This often happens because individuals who are leaders of the partnership begin to identify themselves and their personal needs with the partnership as an organization. Worse yet, many “partnerships” exist that have devolved into social clubs that give individuals a chance to meet and recreate with like-minded people or their friends.

That said, many partnerships have also evolved to continue fulfilling a useful purpose and produce real returns both for their member organizations and society as a whole. Partnerships should set aside time on a regular basis to reassess their

purpose, mission, and goals and take an honest look at their need to exist. Similarly, individual partner organizations should regularly assess both their capacity and commitment to continued partnership. Perhaps the hardest thing for a leader to do is to dissolve the organization he or she leads, but this is also one of the ultimate tests of true leadership.

What are the pros and cons of Formal vs. Informal partnerships?

Most regional partnerships begin on an informal or ad hoc basis as a gathering of interested parties with common needs who decide to cooperate to fill those needs. Often one or more of the partners will express interest in somehow formalizing the arrangement at some point in the process. There are definite advantages and disadvantages to both formal and informal partnerships.

By far the most difficult aspects of a partnership are the questions of funding and control. Regional partnerships often include both public and private organizations, and the public organizations can be from multiple levels of government. This can exponentially complicate the use of funds as leverage in accomplishing goals. It can also bring into play a disparity of net fiscal contributions to the project that adds to questions of who should control the partnership's resources. This can foster suspicions and generate jealousies that prevent the partnership from reaching its full potential.

Formalizing partnerships can address these questions, but carries with it risks in terms of creating additional layers of bureaucratic complexity and long-term commitments. Formal agreements also typically greatly slow the process, with requirements for legal reviews and votes of endorsement from governing boards. Therefore any formal partnership, especially one that involves public agencies partnering with private organizations, should start with the lowest level of formal agreement practicable, and work upwards in complexity as needed.

Some questions partners should ask themselves before moving from an informal to a formal partnership structure:

1. Would a formal structure enhance the ability of the partnership to meet our goals?
2. Can we effectively leverage our resources, especially funding, without a formal partnership?
3. Would a formal partnership result in adding complexity and bureaucracy?
4. Is this added complexity worth it?
5. Is there a consensus among the partnership that we need a formal structure?
6. Will the governing boards of the public and private agencies involved support the creation of a formal partnership?

A further note about the nature of the partnership agreement: In federal contracting law, the Memorandum of Agreement (MOA) provides the lowest level of

legal commitment for federal agencies. Most state law mimics this. Federal agencies often like to advocate that a partnership adopt a “charter” as a way to add a perception of structure but avoid legal commitments. When state agencies are involved in the partnership, this can greatly complicate matters. Many states charter public agencies such as universities, river authorities, regional planning authorities, and similar institutions. This involves giving these institutions budgetary powers, the ability to issue bonds, and often even taxing authority. As such, the term “charter” can require at least gubernatorial approval, and may require a vote of the legislature before an agreement can be adopted. Partners should carefully weigh the potential legal ramifications of language as they move through the agreement process.

The following are some of the pros and cons of the basic partnership structure:

	Formal Partnership	Informal Partnership
Pro	<ul style="list-style-type: none"> - Legal commitments reinforce the moral and ethical commitments of partnership - Structure provided for organizing and meeting - Rules offer predictability to the process - Can lead to the creation of a permanent organization - Builds capacity and offers a framework for perpetuating and expanding that capacity - Can provide a framework for the comingling of public funds 	<ul style="list-style-type: none"> - Moral and ethical commitments of partner to partner - Ease of organizing and meeting - No formal commitment of resources - No administrative overhead or costs - Partnership only lasts as long as needed - No requirements for set meeting structures or rules - Public outreach at discretion of partners - No requirements for public meetings, press access, or notices - Builds capacity without long-term costs or commitments
Con	<ul style="list-style-type: none"> - Can take a long time to reach and approve agreements - Possible public meeting requirements and press scrutiny can impair open communications between partners - Administrative and overhead costs - Legal commitment takes flexibility away from partners’ budgets - Additional accounting challenges with comingled funds 	<ul style="list-style-type: none"> - Lack of binding legal agreements can reduce partner commitment - Lack of structure can make some partners uncomfortable - No structure for direct leveraging or comingling of public funds

Whether or not a formal structure is adopted, the bottom line of any partnership is that it can only be as strong and effective as the commitment of the partners to the effort. There are many extremely effective ad hoc partnerships in place around the nation, and quite a few dysfunctional formal partnerships. Like the basic concept of the partnership itself, the question of formal agreements should only be taken up when there is a bona fide need.

Conclusion

Partnership is becoming more and more important in America. As we grapple with complex issues we begin to realize that social, economic, environmental and other problems cannot be addressed by single organizations or individuals. Individual governmental and nongovernmental organizations either have fractured or limited powers and limited budgetary capacity to address these issues. Unfortunately human nature, legal issues, organizational cultures, and other factors often unnecessarily complicate the partnership process. Nonetheless, partnership is generally the best approach despite its complications.

Regional partnerships are among the most complex of undertakings. Bringing together multiple agencies from multiple layers of government is tough enough. Add in various private nonprofit, and commercial organizations and the challenge grows. Bringing regional partnerships together and making them effective requires skill, patience, understanding, and ability to listen, and strong communications, but most of all it requires a genuine need that all the partners perceive and wish to address.

Finally, all partnerships by their very nature are based upon compromise. If partners are not willing to share resources, find common ground, and most importantly give up a modicum of control to each other the partnership cannot reach its full potential, and may even fail completely. Partnership can be a powerful tool, but can also provide excuses for inaction. Strong leadership and good facilitation can help identify and overcome the barriers to good partnerships, and create the framework for true collaboration between organizations and individuals.