

3 GETTING partners



Partnerships are an opportunity for you to establish relationships with the private sector, government agencies, and other non-government organizations (NGOs)—and to combine your strengths for a common purpose. Partners help you put on events, expand programs, and raise funds. In return, you help partners by sharing your resources and by connecting the business and government sectors to the people in your community.

Like media relations and fundraising, partnership building is an ongoing activity. It will help you thrive in a competitive social action scene. Community-based AIDS organizations (CBAOs) are most successful at getting partners when they use some tried-and-true **partnership-building techniques**.

This section will give you the essential skills for beginning and maintaining partnerships. Plus, you'll find six *indispensable* tools for successful partnership building.

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INTRODUCTION

Partnerships 101

A Partnership-Building Success Story

Toronto's **Black Coalition for AIDS Prevention** (Black C.A.P) has mastered the art of partnership building. To provide HIV/AIDS services and education to Toronto's black communities, Black C.A.P brings together volunteers, other CBAOs, businesses, and government agencies. Many of these partners have worked with Black C.A.P since its founding in 1990.

Black C.A.P's variety of partners is the key to its success:

- Core funding comes from government health ministries
- Program and funding support comes from the **AIDS Committee of Toronto's Key Partners Community Fund**
- Education and outreach programs are presented in partnership with health and social service organizations like the **Women's Health in Women's Hands** community health centre
- Funding drives are organized in partnership with local businesses, including **Come As You Are**, a health and sexuality shop

See more on this story on page 110.

WHAT IS IT?

A partnership begins with an agreement to work together towards a shared goal. Together, partners share responsibilities, resources, investments, liabilities, and benefits. Together, partners can learn from each other, and can grow.

PARTNERSHIPS PROVIDE SUPPORT

Your group's initiatives and services can be even more successful with the support of partnerships. Partnerships come in all shapes and sizes. You can enter into a partnership with other NGOs, with your local coffee shop, or with a multinational corporation.

PARTNERSHIPS BRING TOGETHER CREATIVE MINDS

Partnerships are hotbeds of creativity and solution making. The more partnerships your group enters into, the more opportunities you will have to bring together people with a variety of resources and knowledge.

PARTNERSHIPS BRING BENEFITS

A partnership allows your group to accomplish things it wouldn't be able to achieve on its own. In a partnership, you have the benefit of combined:

- efforts
- resources
- services and programs
- information
- expertise
- leadership
- organization
- promotions
- visibility
- influence
- credibility

PARTNERSHIPS ARE GOOD FOR EVERYONE

Your group benefits from partnerships, and so do your partners. Corporations and businesses get the opportunity for publicity and for the demonstration of their concern for HIV/AIDS issues. Since today's public prefers corporations to be socially aware and responsible, working with a CBAO will improve your partner's image in the community.

THE CHALLENGE OF PARTNERSHIPS

Developing and maintaining successful partnerships will challenge even the most experienced NGO. But every challenge will be a learning and growing experience for your group, so don't get discouraged. You will discover effective ways to communicate, assign tasks, manage initiatives, network, consult, and foresee risks. The challenge of partnerships will build your confidence, your resourcefulness, and your leadership skills.



TYPES

of partnerships

There are many partnership arrangements for you to choose from. You can enter partnerships with:

- **Other community and health organizations**, including other CBAOs, drug awareness groups, advocacy organizations, and health and social service providers
- **Government agencies**, including Health Canada, provincial health ministries, and municipal agencies
- **The private sector**, including both national and local businesses and corporations
- **Existing coalitions**, including local, provincial, or national coalitions with an AIDS, health, social, or community focus

DIFFERENT TYPES OF PARTNERS PROVIDE DIFFERENT RESOURCES

FUNDS

The private sector, government agencies, and other grant-giving bodies can provide monetary funding through ongoing sponsorships, grants, or gifts.

VOLUNTEERS

Other NGOs will already have a pool of volunteers that can work with your organization. Private-sector and government partners are also a great source of community-minded volunteers.

IN-KIND DONATIONS

Sometimes donated goods and services are just as valuable as money. A law firm can give you pro bono legal advice; an advertising agency can do some free promotional work for your messages and events; or an audio-visual company can lend its equipment and expertise to your special events. Printing companies, transportation providers, newspapers, and even your local pizzeria can contribute free posters, a free ride, free ad space, and free food to help you pull off your fundraiser.

EXPERTISE

NGOs, government agencies, and private-sector partners are an invaluable source of knowledge and expertise. Partners provide skilled services, tried-and-true advice, and expert opinions.

12 STEPS TO

building and maintaining a partnership



Successful partnerships are based on solid plans and objectives, and stay successful with your commitment, time, and effort. Make your partnership a success by following these 12 tried-and-true steps:

1 Know your organization

Consider how a partnership would fit with your group's mandate. How would it strengthen your group? Does your group have the resources and staff to allow you to seek out partners?

2 Know your goals

What does your group need to fulfill its mandate, and what type of partnership would make it possible? Do you need partnerships in the private sector, with other NGOs, or with government agencies?

3 Draft your partnership policy

You have evaluated your group's situation and goals, so now you can draft a partnership policy that states what you expect to get from a partnership and what you are prepared to bring to it. This policy will be the basis for how you seek out partners, how you work with partners, and how you evaluate the success of a partnership.

4 Build partnership expertise

Get advice and insight into partnership building. Ask someone from another local NGO to come and talk to your group about their partnership experiences. You can also consult books on fundraising and coalitions.

5 Look into existing partnerships and coalitions

Research and consider joining already existing partnerships and coalitions, like the Canadian AIDS Society, a national coalition of over 100 CBAOs, or a local coalition of businesses and health and social service organizations.

Quick Tip

Consult Health Canada's Social Marketing Network for helpful information about partnership trends:

www.hc-sc.gc.ca/main/hppb/socialmarketing/index.html

6 Select the best partners

With your partnership policy in mind, decide which organizations you will approach with a partnership proposal. Choose groups that you are familiar with and that you know can provide resources and services that will contribute to your group's mandate.

7 Approach your potential partner

Find out who the decision makers are, and introduce yourself. Present them with information about your organization and find out if they are open to getting involved in a partnership.

8 Have a formal meeting

Meet with your potential partners and find out what they are looking for in a partnership, what they can devote to it, and what it would be like to work with them.

9 Prepare a great proposal

Convince a potential partner to enter into a partnership with a proposal that details how the partnership will work and how both of your organizations and the community will benefit.

10 Arrive at an agreement

Negotiate with your partner to arrive at a formal agreement that is mutually beneficial and that keeps to your mandate. An agreement details how the partnership will work, how responsibilities will be shared, and how the partnership can be evaluated.

11 Keep the partnership working

A partnership is an ongoing, dynamic learning experience. Regularly evaluate how your partnership benefits your group, and put into practice changes that will make it work even better. Your partners will change too, so keep up with their interests and concerns.

12 Know when to end a partnership

If you have met the objectives of your partnership or find that it isn't working as well as it could be (after attempts to resolve the issues), it may be smart to consider ending the partnership and dissolving the agreement. Partnership agreements can include a *dissolve* clause explaining how funds, programs, and other resources are to be handled in such a case. Of course, ending a partnership doesn't mean you need to end the relationship.

CHOOSING

the best partners



LOOK AT THE OPTIONS

Local newspapers, neighbourhood businesses, large corporations, government agencies, and health service providers all make for good partners. What kind of partnership are you looking for?

DRAFT YOUR SELECTION CRITERIA

Good partners will help you work toward your goals. Identify good partners with sound selection criteria. Consider:

- TYPE – What kind of partner are you are looking for?
- SCALE – How involved do you need the partner to be?
- NEEDS – What resources do you require from the partner?
- DURATION – How long will the partnership last?

LOOK TO THE PEOPLE YOU KNOW

Many groups select partners they already know as suppliers, sponsors, or supporters. These partnerships make sense because the two partners are already familiar with each other and can appreciate what can be accomplished together.

Professional Wisdom

Search these resources for potential partners:

- Local business directories, chambers of commerce, and boards of trade provide information about community organizations and businesses
- EthicScan Canada Limited collects information about major corporations
- Dun & Bradstreet's *The Canadian Key Business Directory* has contact information for most large businesses
- Charity Village (www.charityvillage.com) has many resources for NGOs, including fundraising news and networking information
- The Sponsorship Report (www.sponsorship.ca) includes information about partnerships between NGOs and businesses
- Health Canada's Social Marketing Network (www.hc-sc.gc.ca/main/hppb/socialmarketing/index.html)
- Imagine (www.ccp.ca/imagine), a program of the Canadian Centre for Philanthropy, encourages partnership building and produces publications and white papers on linking businesses with charitable causes



Trends in

CREATIVE PARTNERING

Partners of community-based AIDS organizations (CBAOs) usually include pharmaceutical companies and health and social service organizations. But there's no reason a high-tech or dot-com company can't be the perfect partner in the fight against AIDS. To compete for resources and funds, many organizations have begun to use this kind of creative partnering strategy. As long as potential partners meet your partnership criteria, there are few limits as to where you can look for one.

BROADEN YOUR HORIZONS

Many businesses and organizations are looking for a chance to show their concern for the community, and you can provide them with that opportunity. What might seem like an odd partnership between a CBAO and a local business can be an ideal arrangement. For example, a communications firm can provide you with Web expertise to develop a teen information site, and you can give the firm a plug with this young, Web-savvy, job-seeking group. Or a local hotel can provide a ballroom and supplies for your annual fundraising dinner and community awards ceremony and, in turn, receive extensive publicity. The possibilities are endless.

Success Story

Uninhibited sexual health partners

In the spring of 2000, the **Black Coalition for AIDS Prevention** received a special donation from local health and sexuality store *Come As You Are*. Since May is (the unofficial) National Masturbation Month, *Come As You Are* joined in partnership with Black C.A.P to raise money with a second annual 'Masturbate-a-thon.' With the objective of promoting sexual health, the partners encouraged Masturbate-a-thon participants to seek pledges from their friends. Sarah Forbes-Roberts, a member of the *Come As You Are* collective, explained how participants followed an honour system when collecting pledge money for every minute they masturbated on May 7. The store chose Black C.A.P as a partner for two reasons: the two groups had the same objectives of promoting sexual health in the community and Black C.A.P was its 'favourite organization.'

Proactive

NETWORKING



Networking can be your key to finding the best partnerships. Proactive networking will bring you into contact with businesses and organizations that can make for excellent partners. So be on the lookout every day—even when you're just doing your own thing.

PROACTIVE TACTICS:

- Get everybody networking: Encourage the members of your group to look for potential partners in their day-to-day interactions with the community.
- Get referrals: Look for introductions to key people in businesses and organizations. Referrals can be arranged through your current business contacts, members of your board of directors, or your sponsors and supporters.
- Get researching: Look for contact names and numbers and any other information that will make your approach to a potential partner easier.
- Get out in the field: Contact the offices and stores of potential partners and introduce yourself. Join associations and attend meetings and conventions. Provide partner contacts with information about your group, including your *Backgrounder* (see page 38).
- Keep in contact: It may take time to gain the confidence and win the interest of a potential partner, so plan on occasionally touching base with your contacts to let them know how your group's initiatives are going.

Professional Wisdom

Make partners come to you.

Many CBAOs are actively solicited by businesses and government agencies that are looking to connect with the community and show their concern for HIV/AIDS issues. Your group has a better chance of being approached if you have a profile in the media and you organize successful events that bring in the community.



APPROACHING sponsors

LAND PARTNERS WITH A PROFESSIONAL APPROACH

If you have already dealt with the media, donors, and sponsors, then you know the importance of a professional approach. A professional approach convinces potential partners that you are serious about working together in an organized, structured, and cooperative fashion.

Here are the basics:

- Focus on your partner
- Listen to their needs and desires
- Express your needs clearly and honestly
- See the partnership from both sides
- Present a partnership proposal and formalize an agreement
- Strengthen the partnership with confidence and positive thinking
- Give value

"HELLO, THIS IS JANE SMITH. WE KNOW EACH OTHER FROM..."

It's easiest to approach potential partners if you already know them. Perhaps the potential partner has made donations to your group before, is a long-time sponsor, or is known through your group's networking activities.

NETWORK, NETWORK, NETWORK...

If you don't already know people in decision making positions with a potential partner, find out who they are and make contact before you make your formal approach. Use a few of these simple tactics:

- Introduce yourself in person, if possible, but make a cold call if you must
- Send your *Backgrounder* and copies of compelling media clippings
- Tell them about upcoming initiatives and events in a lively letter
- Invite them to visit your facilities or attend one of your events

Methods

OF APPROACH



CHOOSE THE BEST APPROACH

How you approach a potential partner depends on two factors: what your group is looking for, and how well the potential partner already knows you.

BY PHONE

Approach potential partners by phone when:

- You need to briefly introduce them to your group
- You need to arrange a meeting to present a partnership proposal
- You are asking for a small donation or short-term involvement with your group

BY MAIL

Approach potential partners by mail when:

- You want to introduce your group in writing before you make a follow-up call or personal visit
- They are already familiar with your group
- They need to be updated on your activities
- You are asking for an annual donation or for volunteers

IN PERSON

Approach potential partners in person for an informal or formal meeting when:

- They are already familiar with your group
- You want to strengthen your relationship
- You are presenting a partnership proposal
- You are asking for a large donation or long-term involvement with your group's initiatives

Smart Moves

Plan your approach.

Your ultimate goal is a face-to-face meeting to talk about a mutually beneficial partnership. But it may take time, attention, and a few calls and mailings to build the kind of relationship that will turn into a solid partnership. Map out your strategy so you can remember to make regular contact.

Professional Wisdom

When a meeting turns into more formal partnership negotiations, you may require the attendance of members of your board of directors or legal counsel.



Approach with a great

PARTNERSHIP PROPOSAL

A Great Proposal Package

Include:

- Background information about your group and its accomplishments
- The objectives of the partnership
- A timeline for accomplishing your objectives
- The roles and responsibilities that you and your partner will share
- Letters of reference
- Your contact information

A GREAT PROPOSAL JUMP-STARTS A PARTNERSHIP

A potential partner will be won over if you approach with a well-crafted partnership proposal. Your proposal is the first formal stage on the way to the partnership agreement. It provides a basis for discussion and negotiation. It puts down on paper the different aspects of a potential partnership, including your goals, your needs, a timeline, and how everything will be accomplished.

YOU, YOUR PARTNER, AND THE COMMUNITY

A great proposal takes into account the two big factors in a partnership: you and your partner. How will each of you benefit? How will each of you participate in the partnership?

Also, the proposal will convince your potential partner that working together will have substantial benefits for the community. While your potential partners will be interested in how they will be involved in the initiative, they will be especially interested in how their involvement will have a positive impact on the public.

THE PARTNERSHIP

agreement



A SIGNED AGREEMENT IS ESSENTIAL TO A SUCCESSFUL PARTNERSHIP

Because a partnership involves shared resources and responsibilities, it is important that your group and your partner sign a formal agreement. An agreement prevents misunderstandings and conflict, and gives your partnership a clear sense of purpose. Plus, an agreement provides you with a means to evaluate whether or not the partnership has helped the two sides achieve their goals.

A FORMAL AGREEMENT INCLUDES:

- Your objectives
- A timeline for goals to be achieved within the partnership
- The responsibilities of each partner
- The resources each partner will bring to the partnership
- A detailed budget
- Guidelines for establishing joint bank accounts (e.g., who will have signing authority, who will be responsible for finances)
- How the partnership will be evaluated, and how often
- A schedule of meetings between partners
- A clause that explains how the partnership can be ended

AGREEMENTS ARE SERIOUS MATTERS

Once an agreement is signed, your group is legally obligated to follow its terms. So it is important to avoid agreeing to anything that can potentially compromise your group.

Make sure you:

- Carefully look over your agreement
- Get the advice of someone who is familiar with partnership agreements—one of your directors or your legal counsel
- Get all members of your group to buy into the agreement

Professional Wisdom

While you're negotiating a partnership, there are certain things you must agree on and some things you might have to be flexible about.

Agree on:

- Objectives and principles
- Leadership
- The best use of available resources
- Responsibilities
- Duration

Keep an open mind:

- A partnership is an ongoing relationship that may need to change over time
- Your objectives and principles will change as the needs of the community do
- Partners have their own evolving objectives, mandate, and organizational culture
- Partners can commit only so much time and resources to a partnership and their level of support could fluctuate



FORMING YOUR own coalition of partners

HIV/AIDS Coalitions in Canada

Canadian Aboriginal AIDS Network (CAAN)
Tel: (613) 567-1817
www.caan.ca

Canadian Inuit HIV/AIDS Network
c/o Pauktuutit Inuit Women's Association
Tel: (613) 238-3977
cihan@pauktuutit.on.ca

Canadian AIDS Society (CAS)
Tel: (613) 230-3580
www.cdnmaids.ca

Quebec's Coalition of Community-Based
Groups Working Against AIDS (COCQ-Sida)
Tel: (514) 844-2477
<http://pages.infinit.net/cocqsida/index.htm>

Ontario AIDS Network
Tel: (416) 364-4555 1-800-839-0369
www.ontarioaidsnetwork.on.ca

Manitoba AIDS Cooperative
Tel: (204) 774-7722
www.escape.ca/~aidscoop

Saskatchewan AIDS Network
Tel: (306) 955-1626 373-2777
saskaidsnetwork@home.com

Alberta Community Council on AIDS (ACCH)
Tel: (403) 346-8858
www.1888stophiv.com

Pacific AIDS Network (PAN)
Tel: (250) 881-5663
www.pan.ca

To better fulfill challenging mandates to provide a variety of services and resources, many community-based AIDS organizations join coalitions. Coalitions are multi-partner organizations. They can be on a regional, provincial, or national scale and may include AIDS organizations, medical practitioners, health and social services, educators, and other organizations that influence behaviour. These coalitions have many advantages, including:

- Shared resources
- Information exchange
- Integrated services
- Greater public influence
- Creative solution making
- Networking
- Coordinated efforts

SHOULD YOUR GROUP START A COALITION?

Starting a coalition is much like starting a partnership, except that it is on a larger scale. More groups are involved, and more factors need to be taken into account. There are many good reasons to start a coalition, including:

- You require the resources of more than one partner to accomplish an objective
- There isn't a network connecting CBAOs and health organizations in your area that allows for the exchange of information
- The community needs a coordinated and large-scale AIDS-prevention initiative

SHOULD YOUR GROUP JOIN A COALITION?

If you find an existing coalition that shares your organization's values, mandate, issues, and objectives, consider applying for membership. You have a couple of options if you are considering this approach:

- Become a member and contribute your resources to the established plan of action

- Form a special branch that addresses a specific need or issue, such as local care for injection drug users with HIV. This is usually possible under larger umbrella coalitions like the Canadian AIDS Society
- Propose that the member groups of the coalition join your group in a re-envisioned coalition with newly focused objectives

COALITIONS WORK WITH CAREFUL ORGANIZATION

There are several important factors to consider when organizing a coalition, including the scale and objective of the coalition, the needs and concerns of the coalition members, and how long it will stay together. A large-scale coalition likely will have:

- Stable operational funding
- Formal status (incorporation, business registration, etc.)
- An elected or appointed group of officers
- A board of directors
- Committees and task forces
- Regular formal meetings
- Regular evaluation of coalition activities
- Criteria for seeking and accepting coalition members

3



THE TOOLS

This section details 6 tools that will make you into a partnership-building professional. Each tool is explained over two pages. The first page describes the tool and gives the how-to essentials. The second page provides a handy sample or checklist.

BUILD YOUR PARTNERSHIP-BUILDING SKILLS WITH THESE ESSENTIAL TOOLS:

- 1 The Selection Criteria
- 2 The Approach Letter
- 3 The Partnership Proposal
- 4 The Partnership Agreement
- 5 The Coalition-Building Checklist
- 6 The Evaluation Checklist



Tool #1

THE SELECTION CRITERIA

FUNCTION

Selection criteria will help you decide if an organization would make a good partner. Create your checklist and rate your partner on each selection point before you enter into a partnership agreement. If your partner meets "must have" and "nice to have" criteria, proceed to negotiations for a formal arrangement. And if a partner doesn't meet your criteria, at least you'll know in the early stages.

ESSENTIALS

BASE YOUR CRITERIA ON YOUR PARTNERSHIP POLICY. CONSIDER:

- Whether or not the potential partner supports your mandate
- How the potential partner can support your objectives
- The type, scale, needs, and duration of your partnership

TO COMPLETE YOUR CHECKLIST, GATHER INFORMATION FROM:

- Your contacts with a potential partner
- The Web site of a potential partner
- Businesses and individuals familiar with the potential partner
- Business directories
- Media coverage

SAMPLE SELECTION CRITERIA CHECKLIST

AIDS COMMITTEE OF YOURTOWN PARTNERSHIP SELECTION CRITERION FOR AIDS AWARENESS CAMPAIGN 2000

FIRST IMPRESSIONS

Mandatory: Interested in promoting HIV/AIDS awareness _____

Mandatory: Respected by ACY client community _____

___/___ endorses ACY mandate and objectives

___/___ will lend stability to ACY programs

PUBLIC PROFILE

___/___ proven record of community support

___/___ experience with media and promotions

___/___ credibility with multiple client communities

RESOURCES

___/___ willing to commit operational funds

Mandatory: Pool of volunteers and staff _____

___/___ resources available for project administration

Mandatory: Willing to commit funds and materials _____

OVERALL IMPRESSIONS

___/___ dedicated, reliable leadership

___/___ willing to be flexible

___/___ willing to engage in creative solution making

___/___ open to a long-term relationship

___/___ Total points

Mandatory requirements fulfilled Y N

Start with Your Point System

You may want to make some criteria mandatory—which means you won't rate them and you won't pursue a partnership with an organization that doesn't meet these fundamentals.

Rated requirements are more flexible, and with a point system that gives your most important requirements the most weight, you can qualify all potential partners with a standard and focused approach. Determine your total available points, the weight of each criterion, and finally, the number that best represents your partner's score in each area.

e.g.,

2 / 5 open to a long-term relationship

20 / 20 willing to commit operational funds



Tool #2

THE APPROACH LETTER

FUNCTION

The approach letter is your best introduction to a potential partner. A well-crafted letter opens the way for a face-to-face meeting—where a real discussion of partnership-building can begin.

ESSENTIALS

The approach letter provides essential information about your group and your partnership-building initiatives.

- Background information about your group, including a list of members and accomplishments
- The community impact of the partnership
- How the potential partner's involvement is crucial
- How the potential partner will benefit
- A call to action or a suggested face-to-face meeting

LETTER STYLE

- Written on your group's letterhead
- Addressed to a specific person at your potential partner organization
- Covers one page ideally—two pages max
- Written in precise and clear language
- Signed by a person the partner knows or by the person who will be the key partnership contact
- Includes full contact information

SAMPLE LETTER OF APPROACH

AIDS COMMITTEE OF YOURTOWN

02/02/2000

George Malt
Yourtown Brewery

Dear Mr. Malt:

The AIDS Committee of Yourtown (ACY) invites you to help us in a campaign to encourage safer sex practices. HIV/AIDS continues to present a serious health threat, especially to young gay men in our community. The ACY is initiating a multi-faceted social marketing campaign to inform our community that the only way to stop this fatal disease is through prevention. With a primarily young customer base, the Yourtown Brewery would make an ideal partner in this campaign.

The ACY was founded in 1988 to fight HIV and AIDS at the local level. In recent years, the ACY's links with the community have been strengthened through collaborative prevention program initiatives with local and national organizations—including Health Canada, the Canadian Aboriginal AIDS Network, and the Canadian Public Health Association.

The first stage of this new campaign will focus on placing informative posters and other materials in downtown bars and restaurants. We will also organize the distribution of condoms along with informative materials about safer sex practices. They would be distributed at downtown nightclubs and bars on two weekends during the summer of 2000.

As a prominent local business, Yourtown Brewery will make this campaign possible. We need your help to produce and distribute posters and information to the businesses that sell your products. With the numerous radio spots we will have, this partnership will raise your company profile with both retailers and young consumers alike, as well as with the general public.

We need to get this campaign under way before the end of May. I look forward to contacting you within the next week to set up an in-person meeting.

I hope I can count on your support to help us get this vital message out to young people at risk.

Sincerely,

Jane Doe
Campaign Chair
AIDS Committee of Yourtown
(123) 456-7890



Tool #3

THE PARTNERSHIP PROPOSAL

FUNCTION

The partnership proposal is a document that is included in your proposal package. It is written to *persuade* an organization to join you in a partnership. Your proposal should explain in detail how the partnership will work, how the community will benefit, and what each partner will bring to the partnership.

ESSENTIALS

WHAT GOES INTO A PROPOSAL

- A description of your partnership needs
- A description of the benefits of the partnership to the community
- A description of the resources that your potential partner would bring to the effort
- A timeline for accomplishing your objectives
- Contact information
- The signature of your group or project leader

WHAT GOES INTO A PROPOSAL PACKAGE

- A cover page with your group name and the date of submission
- Your group's *Backgrounder*
- Your *Partnership Proposal*
- A detailed budget
- Your group's financial statements
- Letters of reference from prominent community members or other partners

SAMPLE PROPOSAL

AIDS COMMITTEE OF YOURTOWN

02/02/2000

PARTNERSHIP OPPORTUNITY

The AIDS Committee of Yourtown (ACY) invites Yourtown Brewery to support our ongoing efforts to encourage safer sex practices and facilitate HIV/AIDS prevention. In partnership with the ACY, Yourtown Brewery can bring important health information to our community.

AN ACTIVE PARTNERSHIP

Together the ACY and Yourtown Brewery will bring a compelling prevention message to the young people of Yourtown with a safer sex information campaign.

The first stage of the campaign will promote HIV/AIDS awareness and safer sex practices with a poster and leaflet distribution timed to coincide with the June 17 Pride Day events. Visually arresting and persuasive materials, which were designed in collaboration with the community outreach program of Yourtown Advertising and Communications, will be placed in downtown bars, restaurants, and a variety of related businesses.

The second stage of the campaign will continue the promotion with a mass distribution of condoms and information about safer sex practices. These will be distributed to downtown clubs and bars on the summer weekends of Pride Day and the Civic Holiday. A radio public service announcement broadcast on the days leading up to and following the mass distribution will reinforce the message.

A PARTNERSHIP WITH RESULTS

The participation of Yourtown Brewery will make this action possible. Yourtown Brewery can support the ACY with volunteer efforts and a budget contribution of \$3,500. Without your participation, the funding, preparation, and distribution of posters and information is beyond the means of the ACY. With your support, the ACY will be able to bring this important message to Yourtown: Prevention is the only way to fight AIDS.

We look forward to your support of this important effort.

Please feel free to call me with any questions.

Jane Doe

Campaign Chair
AIDS Committee of Yourtown
(123) 456-7890



Tool #4

THE PARTNERSHIP AGREEMENT

FUNCTION

The partnership agreement is a document that describes the objectives and expectations of a partnership. Remember, both you and your partner should sign an agreement only after all negotiations are complete. Once it is signed, you are obligated to fulfill its terms.

ESSENTIALS

THE AGREEMENT SHOULD INCLUDE:

- A general statement about the objectives of the partnership
- A detailed description of specific project goals or fundraising targets
- What each partner will bring to the partnership
- What each partner will receive from the partnership
- A detailed budget
- Guidelines for establishing joint financial arrangements
- A timetable for the members of the partnership to reach their goals
- A schedule of meetings between partners
- A clause that explains how the partnership can be dissolved

Smart Moves

Sometimes your partner organization will prepare and present you with the partnership agreement. It is always a good idea to have this agreement read by your legal counsel and approved by your group members before signing.

SAMPLE PARTNERSHIP AGREEMENT

LETTER OF AGREEMENT

This letter will act as a set of guidelines for a partnership between the parties, namely AIDS Committee of Yourtown and Yourtown Brewery, to promote an ongoing public awareness campaign for HIV/AIDS.

Background: *[briefly describe the campaign]*

Purpose: *[describe the purpose of this agreement]*

Objectives: *[describe the goals of the campaign—either in general or with specific targets]*

Roles and Responsibilities: *[detail leadership roles, the financial responsibilities of each partner, and the specific activities you will each undertake]*

Duration and Evaluation: *[describe the duration of the campaign, the timeline, the amendment process, and when and how an evaluation will be done]*

Termination:

e.g., This Agreement may be terminated by any Party on thirty (30) days’ notice in writing. During this thirty-day period, each Party shall continue to be obliged to fulfill its duties and obligations under this agreement.

Partner Identification:

e.g., Any use and placement of the AIDS Committee of Yourtown logo on any material distributed, broadcast, or otherwise made available to the public shall be approved by the AIDS Committee of Yourtown.

References to the AIDS Committee of Yourtown’s involvement in any material distributed, broadcast, or otherwise made available to the public shall be approved by the AIDS Committee of Yourtown.

This collaboration between the AIDS Committee of Yourtown and Yourtown Brewery does not constitute nor may be presented as an endorsement by the AIDS Committee of Yourtown of any Yourtown Brewery product.

Acceptance:

Name & Title
AIDS Committee of Yourtown

Name & Title
Yourtown Brewery



Tool #5

THE COALITION-BUILDING CHECKLIST

Smart Moves

Be flexible.

Partners depend on each other to make a coalition work. Interdependency often leads to conflicts over roles and responsibilities, especially if leadership or power is concentrated on one side of the partnership. Build trust and stay flexible to avoid damaging these fragile and vital relationships:

- Recognize your interdependency
- Involve as many people as possible in decision making
- Share information
- Be open to different opinions and perspectives
- Be open to compromise
- Have a formal process to regularly review roles and responsibilities

FUNCTION

Coalition building requires flexibility from both you and your coalition partners, balanced with a clear sense of direction. Give yourself some direction with a checklist that plots out your coalition-building goals and objectives.

ESSENTIALS

COALITIONS WORK BEST WITH:

- Membership selection criteria
- Objectives
- Organization
- Leadership

SAMPLE COALITION-BUILDING CHECKLIST

MEMBERSHIP SELECTION CRITERIA

- will lend stability to coalition
- endorses coalition's mandate and objectives
- can contribute funds
- can contribute materials and pro bono services
- can devote time and volunteers

OBJECTIVES

- a commitment to work together
- fundraising targets and program goals
- coordinated service to the community
- the improvement of the community's well-being

ORGANIZATION

- operational funds
- corporate or charitable status
- defined roles and responsibilities for each partner organization
- office and project administration
- a schedule of formal meetings
- a facilitator for group decision making

LEADERSHIP

- elected or appointed officers
- a board of directors
- project management (committees, task forces)
- a spokesperson



Tool #6

THE EVALUATION CHECKLIST

FUNCTION

A regular and formal evaluation of your partnership—its ability to meet the changing needs of the community and the success of your joint events and initiatives—is essential to keeping it in good working order. Depending on your needs, evaluations can be done by a professional reviewer, members of the community, representatives of each partner group, or simply by someone within your group. Regular evaluations should be planned in your partnership agreement.

ESSENTIALS

EVALUATION CRITERIA

- Achievement of goals and objectives
- Funds raised
- Meeting planned timelines
- Effectiveness of partnership administration
- Effective use of materials and resources
- Scale and range of partnership efforts
- Quality and quantity of community response
- Management of finances

SOURCES FOR EVALUATION

- Surveys of staff and members
- Surveys of community
- Administrative records

SAMPLE EVALUATION CHECKLIST

AIDS COMMITTEE OF YOURTOWN SUMMER 2000 AIDS AWARENESS CAMPAIGN EVALUATION

RATING KEY: 1 (INADEQUATE) – 10 (EXCELLENT)

ADMINISTRATION

- overall coordination
- enforcement of campaign deadlines
- office management
- response to public enquiries
- coordination of media relations
- effective liaison between partners

MATERIALS

- production of promotions handled in a timely manner
- participation of Yourtown Brewery in poster design
- coordination of promotions production contract with Yourtown Advertising and Communications
- packaging of condoms and information by volunteers

CAMPAIGN IN ACTION

- placement of posters
- print media coverage
- distribution of condom and information packages
- placement of PSA
- cooperation of Yourtown businesses

RESPONSE

- reception of condom and information package
- increase in ACY Web site hits
- increase in calls to ACY information line
- informal post-campaign survey of participating ACY members and volunteers
- post-campaign survey of participating businesses and community centres

FINANCES

- funds received from Yourtown Brewery
- campaign kept within budget
- campaign made effective use of funds

