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Grasping for clarity:
Defining interorganizational relationships

The term 'partner' is often used to describe a wide range of organizational relationships, without necessarily considering the value each contributes toward achieving the organisation's mission. Internal partnership brokers increasingly find themselves in the role of having to serve as voices and instruments of change in support of their organisations having greater clarity about what they mean by partnering, and having more coherent strategies and approaches to partnering development, implementation and evaluation. This paper explores the opportunities and challenges organisations face in making partnering a core part of their work.

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An Experience and Guide to Defining Interorganizational Relationships

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Grasping for Clarity

During the Partnership Brokers Accreditation process I was interested in better understanding the *Working with Donors* agenda and was focused one of my core funders. I set out to establish a foundational relationship with my new funder contact and scope a potential partnership. I quickly realized that this funder was indeed dedicated to building partnerships, although was moving forward assuming that everyone had the same understanding of the term 'partnerships'. It was clear that I would be investing time to build their partnering and brokering capacity, however, I did not consider the extent to which I would also need to build partnering capacity in my own organization.

The misuse of the term partnerships and using terms like coalition, affiliations, and strategic alliances interchangeably, indicates that many people do not have clarity on what a partnership entails or are grasping for a word that would most clearly define what they were doing. This requires building clarity and understanding to articulate the differences and the value that each relationship has.

The following is the story of the process I undertook to begin building partnering and brokering capacity in my organization through the evolution of a tool to define interorganizational relationships. This paper is also intended to serve as a guide for other brokers to apply this tool in their own context, i.e. in their own organizations or partnerships. The process and the tool discussed herein was intended to serve as the foundation for co-creating an organizational partnership strategy based in understanding different types of collaborations, and intentionally building relationships that are fit for purpose – where there is a shared organizational understanding of when, how, and why we engage in partnerships.

Not all 'Partnerships' are Partnerships

Readiness to partner seemed to be evident in my organization as my executive director frequently referenced existing partnerships we were involved in and potential partnerships we could consider. I also had enthusiastic support to participate in the Partnership Brokers Training and Accreditation Programme. However, as I expanded my understanding of partnership theory and practice, I began to notice outdated models and a simplistic understanding of partnerships. 'Partners' had become a friendly way in my organization to describe all organizational relationships, with no differentiation or consideration of the value created in each. This was compounded by opportunistic and ad hoc one-way organizational relationships that were undertaken for external or donor satisfaction. While these provided an easy answer to our funder reports requesting a list of partners, they seldom created any value for my organization and were rarely aligned with any strategic objectives.

As I considered the question of "what does the partnership need to collaborate effectively?", I began to realize that my organization wasn't actually ready for partnering. The pervasive use of the term partner had resulted in it meaning nothing at all. Developing a common language with my colleagues was critical to moving forward with creating equitable, diverse, and mutually beneficial partnerships.

What the partnership with the core funder actually needed was an internal shift in my organization to be partnership ready, beginning with new ways of thinking about the relationships my organization had with others. I undertook efforts to help my colleagues and executive director see the variety of collaborative relationships and try to bring some order through defining them.

Fitting the Tool to the Context

Early on in the accreditation programme, my mentor invited me to consider mapping my organizational relationships on a continuum to better articulate the current stage of my relationships with funders. I considered different models and how they might fit – or might be modified – for my organization, and also anticipated how they might be interpreted by my colleagues and potential partners.

The Transactional-Transformational Continuum (Appendix A) was a good introduction and was helpful in conveying that partnerships could be considered on a continuum. However, I felt that this basic model would be easily misinterpreted by those unfamiliar with principled partnering, and even encourage the continued use of 'partnerships' as an appropriate label for all organizational relationships – exactly what I was trying to avoid.

I was offered another framework by my mentor, an emerging model used by partnership brokers in other contexts globally that illustrates seven-stages for getting to transformative partnerships (see Appendix B). This model framed types of collaborations as 'stages' and made sense in the context for which it was applied, i.e. in a large international organization trying to be better at partnering to challenge 'business-as-usual'. While different from my situation, the seven-stage model was still very helpful. It articulated distinct phases in collaborative relationships and helped to clarify my understanding of different types of collaboration – including clearly identifying that transactional relationships do serve a purpose but are not genuine partnerships. In my context, an organization of twelve staff with limited experience working in mutually beneficial partnerships, it was less important to move through stages, than to clearly understand that there are a range of collaborative relationships.

Using the seven-stage model as a starting point, I slightly amended the labels and descriptions – including changing 'principled partnering' to 'strategic partnering' to reflect language used in my organization's strategic plan (see Appendix C). My version of the continuum also modified the diagram to visually illustrate the transactional-transformational scale of different types of organizational relationships as a dial – a visual depiction that was intended to show the level of collaboration and help others easily see potential partnering impact as collaborations moved toward the transformative end of the spectrum.

With this amended model, I considered where my organization's relationships fit and mapped our current funder relationships. This step clarified my thinking around the value and purpose of these relationships and emphasized the importance of placing them on a tool like the continuum. My next step was to make this tool useful and useable for defining relationships for across my organization.

A Process of Bringing Order and Clarity

Executive Buy-In

‘Partner’ language, used frequently by my executive director, was creating confusion both within my organization and with potential collaborators. This was a significant barrier and addressing it was a priority in creating a new model for my organization.

I began in conversation with my executive director, relating the concept of strategic partnerships to our organization’s strategic plan. I presented the idea of creating a partnering framework and was successful in getting support to move forward with engaging the entire staff team in a process of defining different types of organizational relationships. I shared my thinking and the draft Organizational Relationships Continuum (Appendix C) as a first step in beginning to change the language and build internal partnering capacity. The opportunity to align this work with our strategic plan resonated and provided a clear line to our organizational objective of engaging ‘strategic partners’, and also a request from my executive director to help everyone in the organization be alert to potential partnerships.

Stimulating New Thinking

With the explicit approval from my executive director, I extended my partnership and brokering capacity building efforts to the rest of the organization. My goal in this introduction was to make it easy for my colleagues and executive director to recognize that they are engaged in important organizational relationships and to get them excited about having further conversations about partnerships. I began without the continuum that I’d began to modify, but simply spoke to the different types of collaborations that were possible. I wanted to generate some curiosity about different types of collaborations and stimulate a new way of thinking about partnerships in order to set the stage for a deeper discussion about partnerships.

Updating the Continuum

Although the term ‘strategic partner’ is explicitly referenced in my organization’s strategic plan, it was not well understood or defined. Word choice in the continuum was essential to create clarity. As I considered how I would continue the partnerships conversation with my colleagues, I revisited my first version of the continuum (Appendix C). I made several edits with the intent of crafting concise descriptions and labels that might make the continuum easier for my colleagues to understand.

My edits (see Appendix D) included changing the ‘strategic partners’ label to ‘intentional collaborations’. On reflection, I felt that having a single category of ‘strategic partners’ might be limiting and create some confusion about the strategic nature of more transformational partnerships. I instead added the term ‘strategic partners’ to the description as a way to introduce that strategic partners start in intentional collaborations and are required in more transformational relationships.

Mapping Relationships

The partnerships conversation continued at an all-staff meeting two weeks later. I entered the discussion with a goal to create a space that would make it easy for my colleagues and executive director to recognize that they are engaged in important organizational relationships. I also wanted to get them excited about having further conversations about partnerships. I referenced our organizational goal to engage in strategic partnering, and that this conversation was the beginning of focusing on how to partner.

I introduced the Transactional-Transformational Continuum (Appendix A) as an example of what other organizations are doing and to start to build context and expand their thinking. I then shared the continuum I'd amended (Appendix D), and let people know that they would have an opportunity to help define the labels and definitions over the coming weeks. Not wanting to get into ideological discussions about semantics, I chose not to encourage a discussion about the labels or definitions in the continuum.

The conversation focused on an activity where I invited everyone to think of three to five organizational relationships they had and consider where they saw these relationships on the continuum. Using poster paper with the seven different organizational relationship types, everyone mapped their top organizational relationships on the continuum with Post-it notes. This step required them to think about where they'd put their work and consider which relationships were more important and which were less important to dedicate time and energy to.

What emerged was the beginnings of a map, heavily weighted to the transactional end of the spectrum. This visual illustration clearly highlighted the many relationships with donors, sponsors, and program contractors that had, until this point, been referred to as partnerships.

While I intended to keep the conversation short and use the Post-it note exercise to stimulate thinking, I shared a quick verbal summary of the organizations and their placement on the continuum and closed the session with a promise to continue the conversation at our next all-staff meeting. Upon sending the summary a few days later, one staff member immediately replied with questions about why some organizations were placed in certain categories and another provided names of several other organizations to add to the continuum. This interest affirmed that, for at least those staff members, the short exercise had indeed stimulated their thinking around partnerships.

Exploring Mindsets

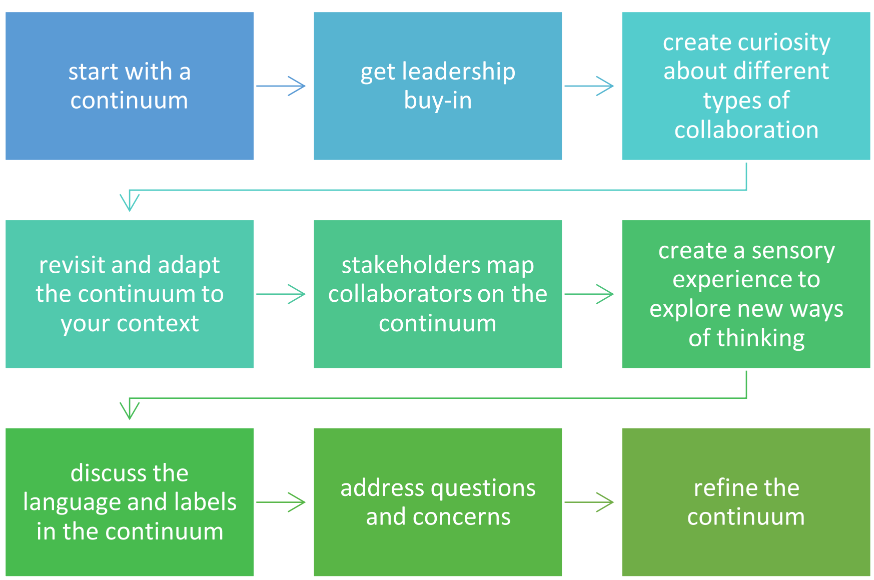
The conversation picked up again at the next all-staff meeting, where I wanted to engage my colleagues and executive director in a short exercise to explore different ways to think about various organizational relationships. I asked them to pick one organization that they had mapped on the continuum at the last meeting and draw an animal or image that it represented. This approach was suggested by my mentor, and a fun way to engage staff in this work. While I expected it would create some discomfort, I liked the idea of creating a sensory experience and open the space for imagining partnerships from a new angle.

Several staff were hesitant to share their drawings due lack of artistic skill, but eventually all did. The result – twelve unique perspectives on a variety of organizational relationships. In more than one case, the same organization was depicted by two different people, and highlighted the potential for different perspectives on the same relationship. Their illustrations and explanations were insightful and, in most cases, very clearly articulated how each person saw the current relationship *and* what the future might be. I appreciated this exercise, in that it provided a break from theory and strategy conversations, and very naturally resulted in many people considering the future potential of some relationships.

It also laid the foundation for the next part of the conversation where we will address three questions: (1) why do we want to partner? (2) what do we need from our partners? (3) what can we offer to potential partners? While this conversation was in process as I marked the end of my accreditation period, it will continue with a deep discussion of these questions and seek to address concerns and questions. With the input of my colleagues and other stakeholders, we will further refine the labels and definitions to create the next iteration of the Organizational Relationships Continuum.

Key Steps to Using the Tool

For brokers addressing similar challenges – where there are various and inaccurate use of terms related to partnerships and collaborations – there is a distinct opportunity to use a tool and a similar process to help define organizational relationships. I approached this conversation in a way that made sense to the context I was working in. The following diagram summarizes my key steps.



Refining the categories and definitions on the continuum was part of an enduring journey to be a better organizational partner. My intent was to build clarity for my colleagues around what we mean when we speak about 'strategic partners' and help them contribute to our strategic goal to be a better partner. It is easy to become overwhelmed by the diversity in collaborations, but introducing a conversation about partnerships is a first step to developing a culture and attitude that supports partnership-making.

Recommendations for a Fit for Purpose Tool

The following recommendations are gleaned from my experience in building partnership and brokering capacity in my organization. These are suggestions for other brokers to consider when working towards creating their own fit for purpose tool to articulate different types of collaborations.

Gain Stakeholder Buy-In

Critical to success of any partnering effort is buy-in of key stakeholders, including your executive director, colleagues, and partners. This work will be challenged by the time and interest of others, particularly when organizations are not partnership ready – where partnerships and brokering are seen as someone else's responsibility in an organization, where existing mental models are deeply engrained, or where there are disengaged members in a partnership. Buy-in of key stakeholders is critical to getting your organization partnership ready.

Use Different Approaches To Expand Thinking

Conversations that are inclusive and help others to articulate the organizational relationships they have, can create excitement and interest among people that are curious and dedicated to advancing a goal. Using different approaches – such as a Post-it note mapping exercise, visual tools, discussions, and physical activities – can help people with different learning styles engage in the process and realize that they have a role to play in partnerships, and that their opinions are valued in defining them.

Adapt Definitions To Your Context

Prior to taking a tool like the continuum to your organization or partners, make time to reflect on the definitions and consider if the categories make sense. To be effective as a starting point, they should fit your context and be adaptable enough to fit with other organization's definitions. Also be sure to remain open to continue adapting the labels and definitions with key stakeholder input.

Experiment With Visual Elements

There are a number of different iterations of the transactional-transformational partnership continuum – a few of which are referenced in this paper. Each model illustrates a unique visualization of the different forms that collaborations may take based on their intended purpose. Experimenting with the visual layout of a continuum should consider how it might be interpreted by others and address your goals in using it as a tool, i.e. are you hoping to motivate and inspire transformational partnerships, or are you looking to help others understand where their relationships fit on the spectrum?

Involve All Stakeholders

In order to be useful in partnerships, the continuum needs to make sense to all stakeholders. I was challenged by time and the confidence early on in the accreditation process to include the core funder, however I do suggest other brokers involve all stakeholders if possible. While the conversation is still continuing in my organization, and the model still evolving, I am encouraged to now to take the framework to the funder that was the focus in my accreditation period. Defining how we want to work together is a critical step in determining where the relationship with this funder will ultimately be placed on the continuum.

Focus On The Key Partnering Principles

The process I undertook was intended to follow the partnering principles to be a collaborative effort, and one that requires courage and openness to include diverse perspectives that are valued through a process of engagement meant to create mutual benefit and realize the value in different types of partnerships. Keeping an eye on these principles is essential in applying brokering theory to practice.

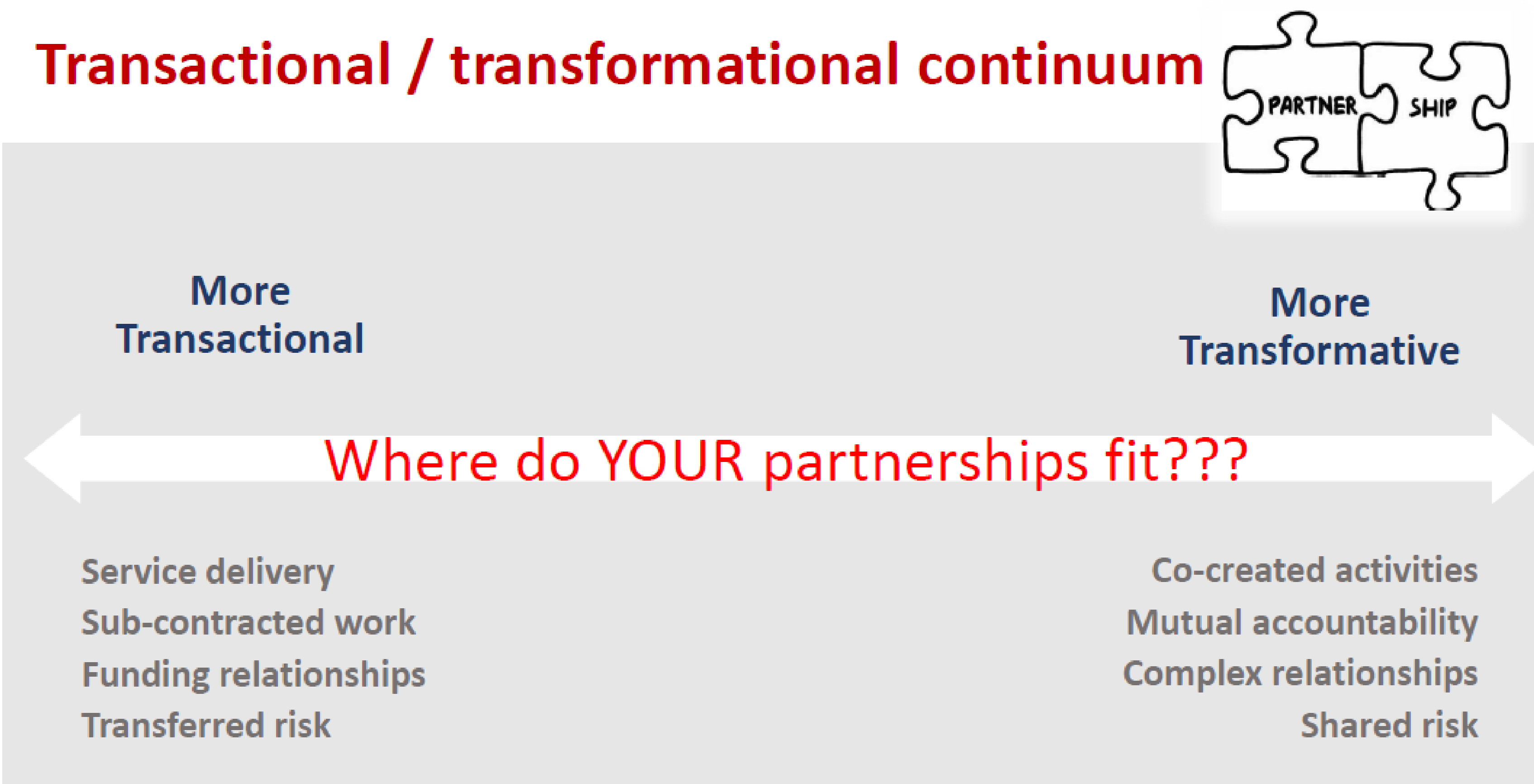
Inspiring Creative Collaborations

Getting ready to partner for any organization can be a complex challenge – one that deals with a multitude of people and their mental models, habits, and assumptions about other partners and what working in partnership ultimately means. Trying to achieve different outcomes through collaboration without challenging ourselves and others to first develop a common language is likely to be fraught with frustration for partnership brokers and confusion for those involved.

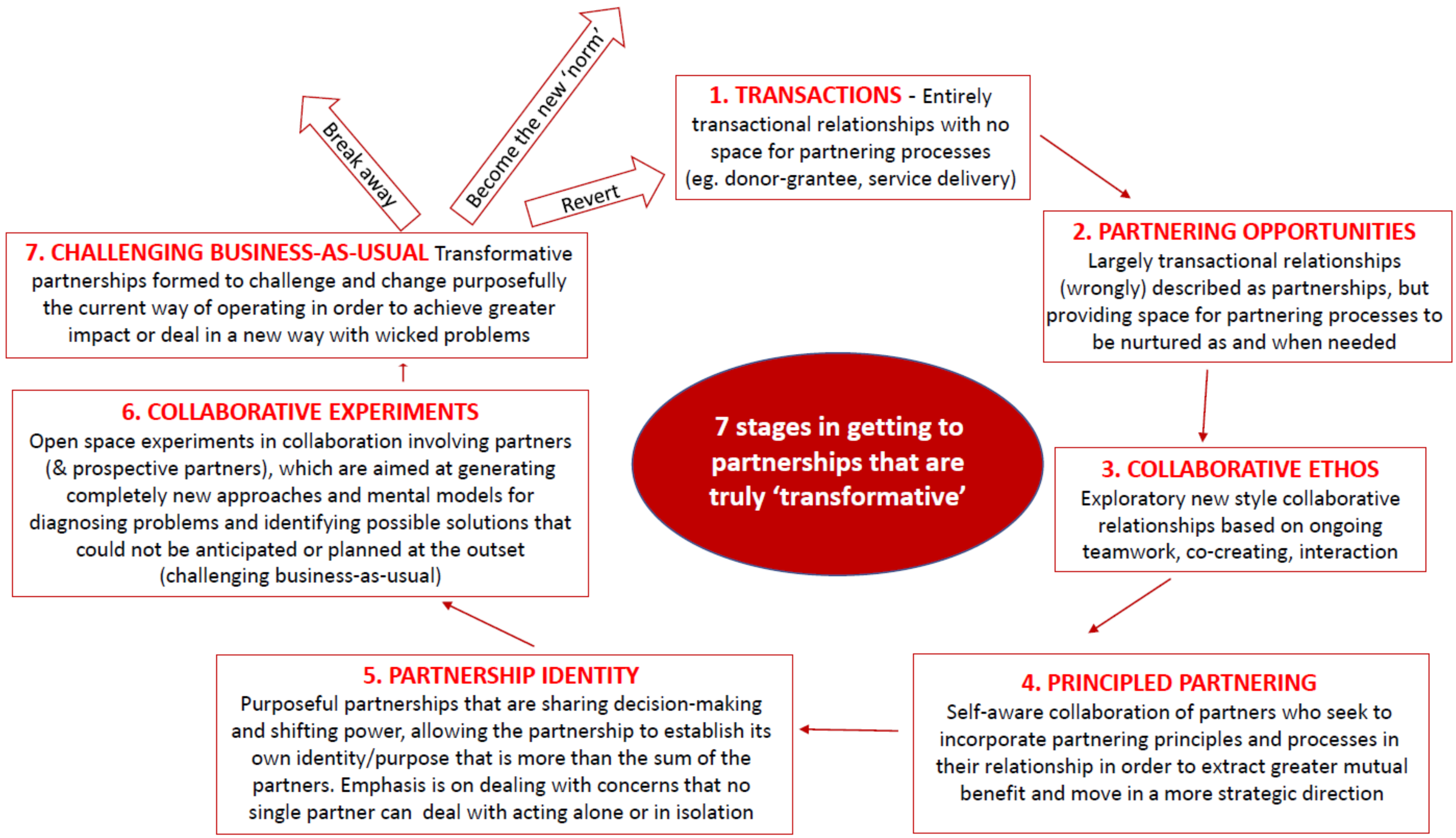
Getting an organization partnership ready will likely require change management. In the process, intellectual and emotional objections are likely to surface, and will require an openness to change from the people involved, and an approach that can help to ease objections. My experience suggests that it is helpful to introduce some formality to start a conversation about defining partnerships. Using tools/frameworks and referencing the experiences of others can be a non-threatening introduction to the process. Where a variety of relationships are already in place, and many on the transactional end of the spectrum, a tool such as the Organizational Relationships Continuum (Appendix D) provides a range of options and places value on each relationship.

The process that I undertook can be used to introduce new ways of thinking about partnerships through curiosity and co-creation over time. An ongoing conversation about partnerships allows others to see their organizational relationships in a new way and inspires new and creative ways to consider different forms of collaboration in their work.

Appendix A: Transactional – Transformational Continuum



Appendix B: Seven-Stage Model to More Transformative Partnerships



Appendix C: Organizational Relationships Continuum 1.0

TRANSACTIONS
Entirely transactional relationships motivated by individual interests and primarily benefiting one party

PARTNERING OPPORTUNITIES
Largely transactional agreements that help both parties achieve their goals and provide the space for a partnership to evolve.

COLLABORATIVE ETHOS
Ongoing teamwork, co-creation and interaction with an intent to create mutual benefit and promote a collaborative relationship.

STRATEGIC PARTNERING
Deliberate action between partners who actively seek to incorporate partnering principles and processes in their relationship in order to extract greater mutual benefit through collaboration. Address shared interests and a common problem to be solved.

PARTNERSHIP IDENTITY
Purposeful partnerships that are sharing decision-making and shifting power, allowing the partnership to establish its own identity/ purpose that is more than the sum of the partners. Emphasis is on dealing with concerns that no single partner can deal with acting alone or in isolation.

COLLABORATIVE EXPERIMENTS
Open space experiments that seek to generate completely new approaches and mental models for diagnosing problems and identifying possible solutions that could not be anticipated or planned at the outset.

TRANSFORMATIVE
Relationships that challenge business as usual with the intent to purposefully change the current way of operating in order to achieve greater impact or deal with wicked problems in a new way.

Version 1.0 labels and definitions adapted from seven-stage model (Appendix B)

Appendix D: Organizational Relationships Continuum 2.0

TRANSACTIONAL RELATIONSHIPS – Entirely transactional agreements motivated by individual interests and primarily benefiting one party.

PARTNERING OPPORTUNITIES – Largely transactional relationships that help both parties achieve their goals and create a foundation for a partnership to evolve.

COLLABORATIVE ETHOS – Organizations come together to explore collaboration and new ways of working together with an intent to create mutual benefits.

INTENTIONAL COLLABORATIONS – Deliberate action between strategic partners who actively seek to address a common problem and achieve greater mutual benefit.

PARTNERSHIP IDENTITY – Purposeful partnerships sharing decision-making and shifting power to deal with issues that no single partner can deal with alone.

PARTNERING EXPERIMENTS – Recognized partnerships using open space tools to generate completely new approaches and mental models for diagnosing problems and identifying possible solutions that could not be anticipated or planned at the outset.

TRANSFORMATIVE PARTNERSHIPS – Partnerships that intentionally challenge 'business as usual' to change systems and/or tackle wicked problems.

Version 2.0 labels further adapted, and definitions simplified from version 1.0 (Appendix C)