Session 8

Engage in Partnerships

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Purpose

Explore the reasons to form partnerships and the various types of partnerships available for conducting policy advocacy. Consider the characteristics of successful teams with the goal of learning to create and maintain effective partnerships.

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Objectives

By the end of this session, participants will:
- Explain reasons to engage in partnerships for policy advocacy
- Name different types of partnerships and define their advantages and disadvantages
- Describe characteristics of effective coalitions

Total time: ~1½ hours

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Session Preparations

Materials Needed:
- Session8_EngageInPartnerships_PowerPoint file
- Handout:
  - Selecting Advocacy Partners Worksheet (at least five copies for each small group)
- Prepared flip charts:
  - Reasons to Partner (title only)
  - What Makes Coalitions Highly Effective? (title only)
- Flip chart paper and markers

Set-Up:
- Small groups at tables

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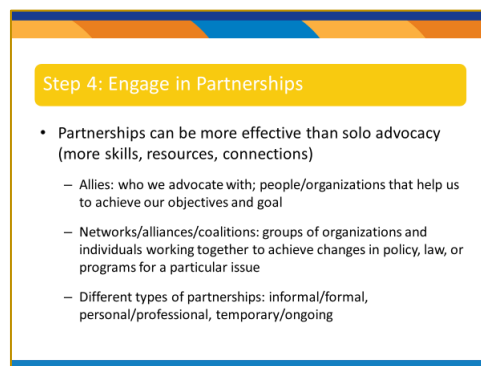</table>

Overview of Partnerships—45 minutes

1. Use the speaker notes, questions, and probes provided to encourage participant interaction during the session.

   Show slide 1.

   Explain: During this session, we will discuss the reasons to engage in partnerships for policy advocacy, explore different types of partnerships and define their advantages and disadvantages, and examine the characteristics of effective teams.

2. Show slide 2.

   Say: Identifying and engaging in partnerships is step 4 in the development of an advocacy strategy. Partnerships can be more effective than solo advocacy efforts because they provide an opportunity to bring together more skills, resources, and network connections. Before we delve into the topic, let's clarify a few terms. Allies are individuals and organizations that we partner with. Networks, alliances, and coalitions are terms used to

identify groups of organizations and individuals working together. Partnerships can be configured to suit a variety of situations.

In the last session, we discussed identifying target audiences. Partners and target audiences can be the same person or organization, but they are often different. A partner works with you to accomplish the goal of your advocacy efforts; a target audience is an individual or a group you are advocating take a specific action as described in your advocacy objective. While there is overlap, these are two different concepts.
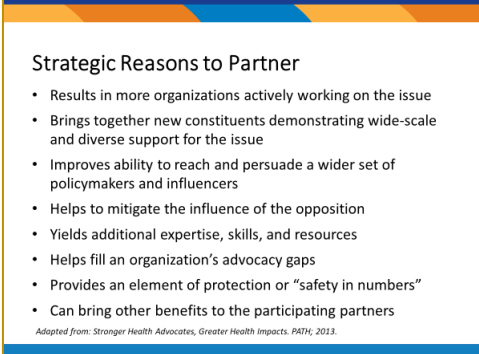
3. Show slide 3 (title only).

Ask: What are some reasons to partner?

Solicit ideas from the participants and write their ideas on the prepared flip chart, Reasons to Partner.

Probe for: items listed on the slide.

Thank participants for their suggestions and advance the slide to reveal a list of possible reasons to partner.

Recognize the items that were brainstormed by the participants and call attention to those that were not mentioned by participants.

Strategic Reasons to Partner

- Results in more organizations actively working on the issue
- Brings together new constituents demonstrating wide-scale and diverse support for the issue
- Improves ability to reach and persuade a wider set of policymakers and influencers
- Helps to mitigate the influence of the opposition
- Yields additional expertise, skills, and resources
- Helps fill an organization's advocacy gaps
- Provides an element of protection or "safety in numbers"
- Can bring other benefits to the participating partners

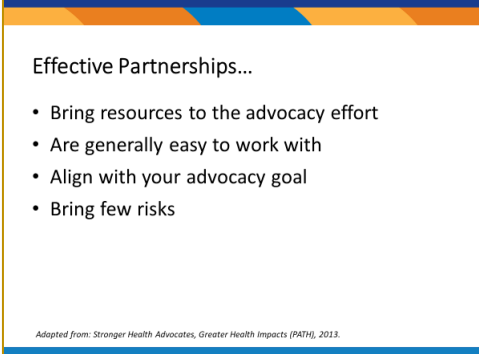*Adapted from: Stronger Health Advocates, Greater Health Impacts. PATH; 2013.*

4. Show slide 4.

Say: Effective partnerships bring resources to fill gaps that may exist within your own organization.

With any partnership, some challenges can be expected. Partners need to strike a balance to ensure that their differences do not detract from accomplishing the goals and objectives.

Partners' views don't need to align on every issue. Sometimes partners may need to agree to disagree. However, partners do need to be aligned with one another regarding the advocacy goal.

Risks need to be weighed with benefits.

Ask: What are some examples of risks that could come through partnerships?

Effective Partnerships...

- Bring resources to the advocacy effort
- Are generally easy to work with
- Align with your advocacy goal
- Bring few risks

Adapted from: Stronger Health Advocates, Greater Health Impacts (PATH), 2013.

Accept suggestions from several participants.

Explain using this example: Imagine you are a leader of the PLHIV Association, which includes representatives from key populations. Your association is considering partnering with the Faith-based Network (FBN) to advocate the government to allocate more funding for HIV testing and treatment in the country. The FBN includes some members who have made disparaging remarks in public against key populations. Teaming up with this partner could risk alienating some of your own members—those representatives from key populations—or you might not attract future members. However, the FBN has a lot of credibility and influence with the minister of health and other government decision-makers. In this example and in other real-life situations, the risks of a potential partnership must be weighed against the benefits of the potential partnership.

Ask: Have any of you faced this issue before? If so, what did you do to mitigate or reduce the risks?

Accept responses from one or two participants.

Say: Other types of risk include financial risk, legal risk, reputational risk, potential loss of public or influential support, and potential loss of client support. Taking some positions can result in risks with legal ramifications; for example, working with MSM groups in a country where sodomy is illegal. Taking an unpopular position may affect your organization's relationship with the public or result in a loss of funding or other negative consequences.

5. Show slide 5 (title only).

Say: Since coalitions/networks are a common type of partnership for advocacy work, let's consider some advantages and disadvantages of these partnerships.

Ask: What are some advantages of coalitions? Probe for: items listed on the slide.

Thank participants for sharing their ideas.

Advance the slide to reveal the advantages and highlight items not mentioned by participants.

Advantages to Coalitions

- Enlarge base of support significantly
- Make the issue seem more legitimate when there is a mass of interest
- Give partners courage (strength in numbers)
- Foster a holistic, integrated viewpoint on the issue

Adapted from: Advocacy in Action; a Toolkit to support NGOs and CBOs Responding to HIV/AIDS and Networking for Policy Change: An Advocacy Training Manual, POLICY Project, Futures Group.

6. Show slide 6 (title only).

Ask: What are some disadvantages of coalitions? Probe for: items listed on the slide.

Thank participants for sharing their ideas.

Advance the slide to reveal the disadvantages and highlight items not mentioned by participants.

Disadvantages to Coalitions

- Harder to reach consensus
- Working to achieve consensus could cause delays
- Trying to satisfy all members may dilute the advocacy impact
- You may not always get credit for your hard work—while others may get credited for no work
- Power not always equally distributed

Adapted from: Advocacy in Action: A Toolkit to Support NGOs and CBOs Responding to HIV/AIDS and Networking for Policy Change: An Advocacy Training Manual. POLICY Project, Futures Group; 2003.

7. Show slide 7.

Say: Depending on the situation, collaborations may range from less to more formal.

Ask: Can you think of examples of each type of collaboration? Probe for: examples related to items mentioned on the slide.

Thank participants for their examples.

Offer these additional explanations for each type:

Types of Collaboration

- Information and data sharing
- Developing common messages
- Mutual consultation
- Joint planning and strategizing
- Coalitions and alliances
- Funding

Less Formal

More Formal

Adapted from: Stronger Health Advocates, Greater Health Impacts (PATH), 2013.

- Information and data sharing. In this less formal collaboration, individuals and organizations agree to freely share information and data from their contacts and lessons learned through their work. There is no requirement for partners to make decisions jointly or to use the shared information in a particular manner.
- Developing common messages. In this situation, partners agree to share information and analyze it together to identify trends and develop shared messages. Each organization uses the messages to fit their advocacy

strategy, which may or may not be coordinated with the partner.

- Mutual consultation. In this case, partners use one another as a resource for ideas but develop and implement their plans independently to achieve their policy advocacy goals.
- Joint planning and strategizing. As the title infers, partners identify similar challenges and develop mutually supportive strategies to address the issues. Each partner does its own work but holds the other accountable for agreed-upon actions.
- Coalitions and alliances. Coalitions and alliances where individuals and organizations develop and implement a shared action plan are one of the most formal types of collaboration. Partners commit to support the plan and each other. Some alliances are temporary and dissolve after reaching their goal. Other coalitions are long-term alliances with a permanent structure and organization.
- Funding. Organizations often receive funding from individuals or donor organizations to conduct advocacy work. This can be considered a type of collaboration. Donor relationships can differ, with some donors actively involved in the technical aspects of the advocacy work while others are content to provide funds and be less engaged in the work. Most collaborations with donors are formal with an expectation of reporting about how the funds were used.

8. Show slide 8.

Say: As you consider what types of partnerships you want or need to create, there are several questions you can think about to help you assess potential partners. Take a moment to read the questions.

Pause for a moment while participants read the questions.

Say: The answers to these questions will provide some things to consider when selecting partners.

Identifying Partners—Questions to Ask

- Which other organizations, groups, and individuals are concerned or already acting on the same policy issue?
- Do coalitions exist or do they need to be established?
- What has contributed to the success or failure of other alliances or coalitions?
- How are these organizations or coalitions perceived by decision-makers? Or the general public?
- How can you contribute to the efforts of other organizations?
- What role do these organizations want you to play and what contribution do they expect from you?
- Do other organizations see you as adding value to their efforts?

Refer to your power maps!

- Remember your power maps as you consider potential allies. You have already identified those who may be supportive of your policy advocacy issue, and perhaps your potential partners are among them.

- Think outside of traditional partners. A powerful alliance often has voices from numerous sectors, which helps to demonstrate the appeal of the solution to numerous groups/interests.

- You may also wish to bring on a party that is neutral on the issue but has a great deal of influence. What is the opinion of the public or key decision-makers about the work of a potential partner? Does this work in favor of or against your current goals?

- Use the responses to these questions to help identify ideal partners and the types of relationships you would like to have with each.

9. Show slide 9.

Introduce the activity using the instructions on the slide.

Say: Turn to the person next to you and spend five minutes discussing how you have reached out to new partners to conduct advocacy or other work. After you share ideas in your pairs, we will ask for a few volunteers to share those strategies with the entire group.

After five minutes, ask for a several volunteers to share their ideas and/or the ideas shared by their partner (pair) with the group.

Mention these approaches for reaching out to new partners if not shared by the participants:

- Use your existing network and ask for introductions.

- Attend a conference or meeting you have not attended previously.

- Use networking platforms (e.g., LinkedIn, Facebook).

- Post an announcement on your website—Looking for partners!

Activity—Pair Share

- Turn to your neighbor.
- Take 5 minutes to share ideas about how to reach out to new partners.
- Report ideas to large group (several volunteers).

- Send a letter of interest and/or a concept note.

- Schedule a one-on-one meeting for an informational interview.

Say: It is as important to have talking points ready to share with a potential partner as it is for the target audience of an advocacy message. In the next session we will take a deep look into developing powerful and concise messages.

10. Show slide 10.

Say: We have now discussed strategic reasons to partner, how to identify prospective partners, and methods to reach new partners. Now let's review how to form one type of partnership, a coalition, and maintain this relationship.

Look at the left side of the slide and consider these elements related to forming new coalitions.

Ask: Do these characteristics make sense to you? Explain why. What different elements are needed at each stage?

Accept responses from one or two participants.

Say: Now look at the elements on the right side of the slide. These are required to help maintain a coalition. Why do you think these are important?
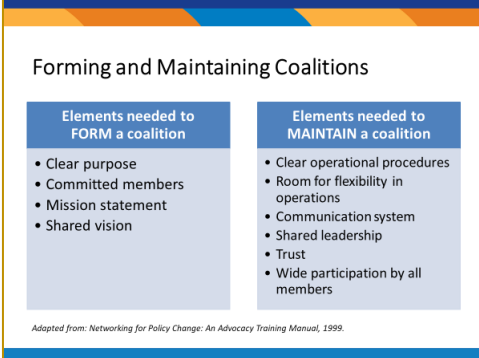
Thank participants for sharing their ideas.

11. Show slide 11 (title only).

Say: Now, let's brainstorm for a few minutes about the characteristics make coalitions highly effective.

Solicit ideas from the participants and write their ideas on the prepared flip chart titled What Makes Coalitions Highly Effective?

Probe for: items listed on the slide.

Thank participants for their suggestions and advance the slide to reveal a list of characteristics of effective teams or coalitions.

Forming and Maintaining Coalitions

Elements needed to FORM a coalition	Elements needed to MAINTAIN a coalition
• Clear purpose • Committed members • Mission statement • Shared vision	• Clear operational procedures • Room for flexibility in operations • Communication system • Shared leadership • Trust • Wide participation by all members

Adapted from: Networking for Policy Change: An Advocacy Training Manual, 1999.

What Makes Coalitions Highly Effective?

- Trust
- Productive conflict
- Accountability/ commitment
- Clear/shared goals/purpose
- Respect/clear roles/participation

- Listening/open communication
- Flexible/consensus decisions
- Relationship with the public
- Self-assessment/ awareness

Recognize the items that were brainstormed by the participants and call attention to those that were not mentioned by participants.

Summarize: These characteristics of effective coalitions and partnerships are adapted from findings about effective teams.
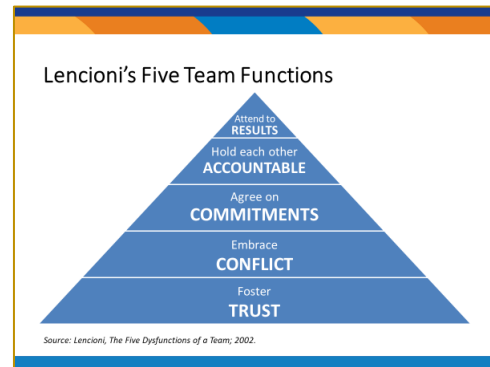
12. Show slide 12.

Say: Patrick Lencioni analyzed how teams work and where they encounter challenges. His model focuses on five team functions, which relate to positive traits required for a team to be effective.

As you can see, trust in one another is the foundation for an effective team. Each step up is another element that will allow for greater effectiveness. These elements can only be developed over time, while learning about one another, resolving conflicts, and working together.

Ask: Reflect on teams and partnerships that you have been involved with. How was your experience similar to or different from the stages and functions shown in these two models?

Solicit experiences from several participants.

Activity—45 minutes

13. Show slide 13.

Distribute to each small group five copies of the handout, Selecting Advocacy Partners Worksheet.

Introduce the activity using the instructions on the slide.

Say: In your assigned small groups, continue with the same objective you have been using for the previous exercises, and identify three to four potential advocacy partners.

Use the Target Audience Analysis Worksheet and your power maps completed last session along with the Selecting Advocacy Partners Worksheet. Partners may already be listed on the power map, or your group may brainstorm other organizations or individuals not on the

power map but that you think would make good partners. Spend about 30 minutes completing the worksheets. Be prepared to share your findings about one potential partner with the larger group.

For your convenience, the questions to ask when trying to identify partners are included on the worksheet. Complete a worksheet for each potential partner. Discuss and record the answers to each of the considerations listed in the first column on the worksheet: begin with strategic reasons to partner, include both what partners bring to you—resources, staff, connections—and the benefits you can provide to the other organization. Next, note the disadvantages including potential risks. Then indicate which type of collaboration might be most appropriate: information sharing, mutual consultation, joint planning, etc. Finally, note how you will reach out to the partner if you do not know them.

Give periodic updates about the amount of time remaining.

Circulate among the groups to answer questions.

Ask each group to briefly share their findings about one potential partner. Encourage presenters to be very brief so that all the groups combined take no more than 15 minutes to present.

Note: Remind participants to retain their worksheets, because these will be needed later in the workshop.

Wrap Up—5 minutes

14. Show slide 14.

Conclude the session by reviewing the learning objectives, summarizing the key concepts and definitions, and clarifying any participant questions.

Learning Objectives—Session 8

- Explain reasons to engage in partnerships for policy advocacy
- Name different types of partnerships and define their advantages and disadvantages
- Describe characteristics of effective coalitions

Selecting Advocacy Partners Worksheet

Instructions: To begin, review the questions to consider when identifying partners. Record the issue/goal/objective under consideration. Write the name of the potential advocacy partner. These may be organizations, individuals, or existing coalitions/alliances. Provide two to three strategic reasons for selecting that partner (including the benefit to the partner of collaborating with you), along with any potential risks they may bring, and what type of collaboration may be most suitable. Lastly, note how you plan to connect with the potential partner (e.g., getting a mutual connection to introduce you via email). Complete one form for each potential partner.

Issue/Goal/Objective:	Potential Partner:	Questions to Consider When Identifying Partners
Strategic reasons to partner *(include benefits to the partner organization)*		• Which other organizations, groups, and individuals are concerned or already acting on the same policy issue? • Do coalitions exist or do they need to be established? • What has contributed to the success or failure of other alliances or coalitions? • How are these organizations or coalitions perceived by decision-makers? Or the general public? • How can you contribute to the efforts of other organizations? • What role do these organizations want you to play and what contribution do they expect from you? • Do other organizations see you as adding value to their efforts?
Disadvantages *(include potential risks)*		
Type of collaboration • *Information/data sharing* • *Developing common messages* • *Mutual consultation* • *Joint planning and strategizing* • *Coalitions and alliances*		
How to connect		

Adapted from: Stronger Health Advocates, Greater Health Impacts. A Workbook for Policy Advocacy Strategy Development. PATH; 2014.