

Grantlines: Partnering Local Projects

A practical guide for
community groups
to build partnerships
for their projects



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Disclaimer

Grantlines: Partnering Local Projects is offered as a general introductory text. It should not be relied upon as formal advice. Users of this Guide are encouraged to take legal, financial or organisation advice to understand the context and implications of their decisions.



executive summary

Acknowledgements

The idea for writing *Grantlines: Partnering Local Projects* formed in a small playground in Cobargo in south eastern NSW following a meeting with experienced community developer Suzy McKinnon. While my two sons played happily nearby, Suzy spoke of some of the issues and considerations for small community groups when seeking to establish long term partnerships to support local projects. This, and further research with other communities, led to this Guide taking shape. The Guide is intended to help build a bridge between community groups developing local projects with potential partners, particularly companies and organisations who share an interest in their community.

In the preparation of this Guide, I have received encouragement and support from community groups, a number of energetic and innovative women involved in rural and urban-based development across Australia, companies, organisations and people within Australia's philanthropic sector. I would like to especially thank Genevieve Timmons, author of *Savvy Giving* and Philanthropic Executive Portland House Foundation, for reviewing the Guide.

About Rebecca Iliffe



Rebecca Iliffe established Turnstone Projects in 2003 to work with companies, organisations and communities where shared interests exist. Turnstone Projects works in three related areas: Grantlines, partnering people and projects for good; asset-based regional investment attraction; and project development.

Rebecca's career has spanned all of the areas encompassed today in Turnstone Projects. Her earliest work was as a professional wool classer in shearing sheds across eastern Australia, followed by early stage processing and facilitating technical training for international users of Australia wool. She then spent over ten years working with government and industry in business and community in development and investment attraction roles. This included preparing a number of community guides for attracting appropriate investment and partnerships in regional areas.

Rebecca has a strong interest in and engagement with philanthropy both as a grant seeker and grant maker. With her husband James, and the involvement of their two young sons, their small family trust supports innovative education-related projects in metropolitan and rural areas across Australia.

Rebecca is based in Sydney, having lived, worked and travelled widely in Australia. She holds a Masters of International Relations and a Bachelor of Applied Science in Agriculture.

For further information: www.turnstoneprojects.com

Grantlines: Partnering Local Projects aims to support community groups interested in developing partnerships for local projects within and beyond their communities. It provides practical and proven ways for a community group with a local project to develop the foundations for effective partnerships with companies, business, organisations, associations and the philanthropic sector who share an interest in their community.

Potential partners may share an interest in your community for a range of reasons: commercial or business grounds; access to land, resources and employees; the delivery of services; or because they want to respond to an identified social issue. There are many benefits when local projects, guided by community groups, join with organisations already connected to or interested in the community. These partnerships contribute to the impact of the project, bring value to the partners in the work they do and support the community's viability and sustainability.

This Guide describes an approach to partnerships that is about building relationships and leveraging from existing assets within the community. Assets can mean any business, organisation, association or individual already connected to or interested in the community. People and organisations with a connection to or interest in your community are often keen to contribute. In many cases they will already be contributing but may also be looking for new, different or more sustainable ways to engage. This Guide helps a community group make these connections. It helps build the bridge between the community and the partners in a considered way. It requires patience, understanding, generosity and dedication from all those involved.

This approach is different to grant seeking. While funding is certainly part of the partnership picture, it is not the focus of this Guide. Rather, the focus of this Guide is on encouraging and building collaboration for long-term relationships with others who share an interest in your community. It also means that the skills needed for establishing partnerships are developed within the community. If further advice is needed, the role of the 'outsider' can to mentor, facilitate and support. This approach enables the community to engage in discussions early on with potential partners and help bring projects to life more quickly.

There are many ways to develop partnerships. This Guide aims to make the idea and practice of establishing partnerships within and beyond the community more accessible. The focus is very much on the community group taking the lead. To do this, it identifies some of the key elements that prospective partners will want to know about the project and those proposing the work.

This Guide aims to be as practical as possible, given that those developing projects in their local community are often volunteers and have many pressures on their time and resources. It blends a workbook approach with ideas, suggestions and further references. In this way, the Guide can be either a toolkit or a reference, depending on the skills and experience of the group.

The Guide has been written as part of Turnstone Projects' Grantlines service. Grantlines provides support to companies and organisations to collaborate with the community where they operate, rely on, partner with or give to locally developed projects. We do this through a guided process and we work with a range of industries and with communities across Australia.

It is hoped that this Guide can help community groups to build, develop or hone their skills in establishing effective and appropriate partnerships which will be beneficial for all.



introduction

Locally-based volunteer groups and associations who seek to bring about positive, long-term change will often benefit from establishing partnerships with others within and beyond their community. Collaboration can bring additional energy, publicity, expertise, resources, profile and connections. It is particularly useful when the issue being addressed requires a long-term commitment, is complex or relies on others to help bring about change. It is also useful when the initial project being proposed can be a catalyst for ongoing work that will help the community and communities further afield.

Developing successful, ongoing relationships with partners requires significant research, planning and preparation. To support this process, Turnstone Projects has prepared this practical Guide. *Grantlines: Partnering Local Projects* aims to help community groups position their locally developed projects for potential partnerships. These partnerships may be with business, local council, regional organisations, philanthropic trusts and others. It might bring together a number of partners on the one project.

Projects suited to partnerships are those that are long-term or bring about major positive change in a community. It may be an initiative to improve early childhood health and ensure a successful transition to school. It could be a project to establish a community garden to promote healthy eating that also includes opportunities for education and training qualifications, employment and small business. It might aim to bring new life to historical but disused community 'assets' or provide support for the community during or following industry restructuring. There may be an annual arts-based or education-based event that brings a range of people from within and beyond the community together. Or the community may seek to purchase a significant item – historical or contemporary – that helps build the identity of the region and boost its tourism potential. The project could centre on helping a community centre that provides a broad range of services – from maternal health to migrant resettlement – with additional resources and planning to accommodate increasing demand. There are, of course, many other projects that benefit from having strong partnerships. What they share in common is a need for collaboration in order to address the often complex and challenging issues involved.

This Guide aims to support community groups develop the foundations for successful partnerships in order to bring locally developed initiatives to fruition. It can be used as a working document, reference or checklist, depending on the experiences of the community group. It is divided into two sections: Section 1 looks at the Project and Section 2 explores potential Partners. Each section includes questions to consider, ideas to discuss, checklists and other activities.

This Guide also includes links to further information and useful resources, which are often free and publicly available. Also included is a range of online tools to help plan and manage your project. While not a necessity, they can be a helpful way to plan and progress your project. These products and services would need to be assessed by the community group for their suitability and affordability.

The way in which a community group uses this Guide will depend very much on the group and the project(s) they have developed or are developing. It is expected that people using this Guide already feel that their project, or their idea for a project, has the potential to interest others.

Users of this Guide will have differing levels of experience, expertise and familiarity in establishing project partnerships. Some will be new to the process and use the Guide as a practical work book, completing each stage. Some will already be very skilled and may use this Guide as a checklist and reference tool. Others may see benefit in using the Guide as a teaching and training document for new volunteers on their project.

Whatever your experiences, I hope you will draw ideas from this Guide that will assist you as you consider, plan and refine how your project will build partnerships that deliver long-term benefit to your local community.

section 1 about the project

1.1 Determining partnership potential

There are many ways to think about establishing a partnership and there are many reasons for doing so. As a community group, you will have most likely already decided that there is value in seeking a partnership or partnerships for your project.

You may have asked some or all of the following questions:

- Does the project provide a new service, amenity or resource?
- Does the project seek to help the broader community, or will it address a chronic issue that supports one group in the community but will have significant impact?
- Is our project likely to be of interest to others outside the community?
- Can businesses, organisations and others use the project or its outcomes to support their own activities?
- Does our project support people who live here or who might want to live here?
- Is our project and our approach different and innovative?
- Does it provide a model for other communities to address a similar sort of issue?
- Does our project promote our strengths as a community or show another side of the community to a wider audience?
- Will our project or its outcomes be sustainable over the long term?
- When we are successful with this project, will it generate other follow-on or related projects?

1.2 Approaching projects and partnerships

When considering what might be best for your project, it is useful that you use a consistent approach to discuss, consider and agree on ways forward. This helps focus discussions on the key issues and maintains progress towards your overall goal. It can also enable effective 'between meeting' work.

A useful way to do this is to ask one simple question. It needs to be asked often and by everyone involved in your project. It is as relevant at the planning stage of your project as it is when you are holding discussions with potential partners, allies, supporters and collaborators.

This question is: **If** we do this, **then** what will happen?

This question goes to the heart of the purpose of the project and partnership. It can clarify whether the planned approach and contributions will achieve what is intended. It helps to determine if there is a right fit with the partnerships you are seeking, if there is likely to be mutual benefit and if there are others to be interested. It can also help understand if the issue being addressed has linkages to other sectors, projects and initiatives and, if so, how best to engage in these discussions.

There are other ways to question and define projects but this approach, drawn from Logic Model thinking, offers a practical and efficient way to keep projects moving and on target. This causal thinking – that is, *if I do this, then this will happen* – is also referred to as Theory of Change.



The Theory of Change approach can demonstrate to potential partners that your community group is thinking through and beyond the immediate project. Showing an awareness of Theory of Change, and engaging with this process, shows others that you are taking a considered and strategic approach. It provides common ground between your group and your potential partners. Being familiar with this process is also likely to help when partnership discussions are underway because, at that time, all parties will need to agree on shared activities, outcomes and potential impacts. A Theory of Change approach can provide a valuable framework to guide these discussions.

Logic models show progression based on determined steps or a logic chain:



Asking this question regularly as the project and project partnerships are developed means that the project's aims and expected outcomes are clearly defined and understood. It is equally important to ask this question of the people that your project seeks to help. While there will always be other activities, issues or decisions that might affect your project well beyond your control, this approach encourages critical thinking about all aspects of the project. It also helps identify potential risks to your project and ways to minimise or avoid them.

This approach encourages a systematic approach but it is not always easy. In many cases, community groups will be tackling complex problems that take time and need to involve others. Theory of Change thinking helps to identify the key issues and assess what really needs to be done to bring about positive, long-term change.

It is important to note that this approach does not generate a 'to do' list or a project plan. Rather, it helps guide discussions so that your group can think about the issue in its broadest sense, as well as the contribution your project will make and the potential results it will generate. Used successfully, it can help define and design the project and also help identify the types of partners or collaborators most suited to the project.

There are many other ways to define, consider and discuss projects. There are also vast bodies of work and much greater detail available on Logic Models to help with the design, implementation and evaluation of a project, including The LogFrame Matrix.

Some useful references include:

- The Centre for Social Impact: <http://csi.edu.au/>
- Wikipedia for another definition: http://en.wikipedia.org/wiki/Logic_model
- W.K Kellogg Foundation Logic Model Development Guide: <http://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide>

1.3 Linking local projects to partner priorities

The Logic Model approach can also provide a useful tool for your community group to think about the longer term outcomes and potential impacts of the project.

Across Australia, there is a growing importance of measuring the impact of projects and initiatives. Measuring impact requires a long-term timeframe. It also requires very clear project planning so that agreed measures and expected results can be evaluated and tested over the longer term. This is why this Guide encourages community groups to ask 'if we do this ..., then what will happen?' at all stages of a project, especially during the planning phase.

A timeframe for measuring impact might be 10 or 20 years from the start of the project. As a result, projects most suitable for assessing impact are often ones that seek to address complex, cross-sector or entrenched social issues that involve a range of partners working together.

Partners, grant makers, companies, government and organisations are all looking to report on the *impact* that their contribution of resources or expertise is making. It is a rapidly growing area of interest, study and practice. As a result, your project might become part of a broader focus and the requirement for ongoing review may emerge.

For community groups, this may sound like a barrier to establishing partnerships. However, measuring project impact (that is, the benefits of the project over the long term) is not always the job of the community group undertaking the project. It can, for example, be done by those organisations who are partners in the work.

An example of a useful framework to do this is the Collective Impact Approach. The approach helps tackle long term and entrenched social issues by encouraging structured and defined collaboration. There are many other approaches and another often cited as a helpful way to measure impact is Social Return on Investment (SROI). Along with social benefits, this framework also measures environmental benefits and encourages practices to be financially responsible.

Governments are also trialling Social Impact Bonds. Originating in the United Kingdom and trialled in 2010, Social Impact Bonds provide a way for governments to make a contract between the public and private sector, with private capital used to implement preventative programs that address areas of pressing social need. For the private sector, the delivery of the program or service generates attractive financial returns for them and other investors.

Another collaborative approach to help tackle long-term social issues is Social Venture Australia's Social Impact Fund. This is a partnership between government and private investors to provide loans or equity to social enterprises.

Considering these trends, and understanding possible imperatives for potential partners in how they can help others, will inform community groups in the way they identify and make connections within and beyond their community.

Some useful references include:

- The Collective Impact Framework: <http://www.collaborationforimpact.com/collective-impact/>
- Social Return on Investment: <http://www.thesroinetwork.org/>
- Social Ventures Australia: <http://socialventures.com.au/work/sva-social-impact-fund/>
- Pro Bono Australia: <http://www.probonoaustralia.com.au/>
- GOV.UK: <https://www.gov.uk/social-impact-bonds>



1.4 Converting the answers to useful material for your proposal

Answering the ‘if – then’ question, and recording that information systematically, can help describe and explain the project in a clear and comprehensive way for potential project partners.

Steps to do this are:

- 1. Audience analysis:** Identify the needs, interests and connections of the main groups interested in the issue, including potential users, clients, partners and others working in or supporting this area or a related field. Often this requires on-the-ground research to accurately determine what is needed.
- 2. Objectives analysis:** Map each major issue by dividing it into two groups: cause and effect. Write the issue at the centre of the page on ‘ground’ level. Try and frame the issue in the positive. Often there is just one major issue when this approach is adopted because many of the other related issues or problems are a ‘cause’ or an ‘effect’.

Example: There is a ‘*need for a fair and practical system for grant seekers from within the current giving zone to access grants if the essential or desired services are outside of the current giving zone*’. Framing the issue in the negative would be ‘*there is confusion among residents as to how they can access funds for essential or desired services that are not within the area that they live*’.

Once the issue has been written down, list the ‘effects’ of the issue on the client group as the branches of the ‘tree’ and the ‘causes’ of the issue as its ‘roots’. It helps explain why the issue is so important, clarifies the need for the project and identifies where and how others can engage in creating a solution.

- 3. Options analysis:** Take a fresh look at the Objectives analysis and, based on a shared understanding of the issue, consider any other approaches or ideas for the project or its partners that are practical and viable.
- 4. Priorities and plan:** Order those ideas and options most likely to meet the needs of the target group and your potential partners to develop the project plan.

1.5 Planning and writing the project proposal

The steps outlined so far all contribute directly to how you plan and prepare your project proposal.

Writing submissions and proposals for your project is a demanding task. In a few short pages, your community group has to present a clear and compelling case for the project. It needs to provide practical and factual data, as well as showcase the creative, human face of the project and the philosophical values that will underpin the way the work is conducted. Genevieve Timmons explores this from a grant-making perspective in her book *Savvy Giving* and offers useful insights for potential partnerships.

With this in mind, it is likely that the project and or partnership proposal will have all or some of the following elements. For many community groups, this format will be familiar through grant seeking submissions and reporting. How it is written, the emphasis and clarity is what will make the difference.

Elements to include:

Cover Letter: Make a personal approach in a warm and engaging way that informs the potential partner that your group has done its research and wants to form a mutually beneficial partnership. The letter should come from an appropriate representative within your community group.

Cover Page: Provide the key information about your community group and the project at a glance. It should clearly set out who you are, what you are doing, what you are looking for and why, and who to contact.

Executive Summary: Give a short statement about the project and why your group is working on this issue. It should provide a quick overview of the project, of your group and the community, and how well you think this project fits with the potential partner. It should be engaging and encourage readers to read to the end.

Project Title: Develop a short headline that helps explain the focus of the project. It needs to create interest.

Need / Issue: Describe why your project is needed and those it seeks to help. State the issue clearly and simply, give evidence where you can and reference other information to build the case for this work. Also include whether this issue is a priority for others and who these interested parties are.

Project Outline: Outline your solution to the need or issue. Explain what you plan to do, the activities that will take place, when it will be done, who will be involved, who will benefit and what outcomes are expected. Also describe your status as a community group; for example, whether you are incorporated, have any affiliates and your deductible gift recipient (DGR) status, if appropriate.

Sustainability: Detail how the project will be maintained over time, how it will generate funds, its services or infrastructure. This can be difficult but a partnership model where various parties contribute can help make this case.

Project Budget: Provide a detailed assessment of all the costs for the project. Go through the project outline and detail all the activities and requirements. Record all the costs for your project, as well as contributions in kind, donations, sponsorships and other sources of income or assistance.

For example, the rate for volunteer labour is costed at around \$30 per hour for unskilled work (i.e. activities that are not your day job) or the actual market cost/rate for skilled labour (i.e. for a trade performing a trade related job for the project at \$75 per hour or whatever the person doing the work actually charges in the market).

Project Outputs: Describe the tangible actions, products or services that will result from the project. These include quantifiable information and activities, such as workshops, events, interviews, surveys and publications, as well as the number of people you involved in or assisted through your project.

Example 1: Eight tutoring sessions on reading were provided to students over a four-week period. Twenty four students attended the 8 hours of tutoring.

Example 2: 48 weekly budgeting and financial planning workshops were held over 12 month period. 52 attendees from low income backgrounds completed course.

Project Outcomes: Explain what changes will take place or what benefit will occur as a result of your project. This can include changes in behaviour, knowledge, attitudes, skills, values and abilities. It may also be extended to include an assessment of impact, especially if the project is long term or part of a broader collective approach.



Example 1: Improved reading and comprehension skills were achieved for all students. All students increased their reading by one level; 60% of students progressed to the second level on completion of the training.

Example 2: All participants have created a weekly budget and report that they are using it. No participants have sought help from care agencies since the program commenced. 58% of participants have regular savings.

Project Acquittal: Give an overview of how you plan to report on your project using quantitative data ('the numbers') and qualitative data ('the stories' or experiences). Qualitative data can be presented in a variety of engaging ways, such as photographs, case studies, reports, digital storytelling, video productions, plays, blogs and other social media platforms.

Supporting Material: Collect and present materials related to each of the areas above. This additional evidence can help explain how your project will be implemented, why your approach will work and what will be achieved.

Some useful references include:

- *A Grantseeker's Guide to Trusts and Foundations*, Vanessa Meachen (2009)
<http://www.philanthropy.org.au/tools-resources/publications/a-grant-seekers-guide-to-trusts-foundations/>
- *Savvy Giving, The Art and Science of Philanthropy*, Genevieve Timmons (2013)
<http://www.philanthropy.org.au/tools-resources/publications/savvy-giving-the-art-and-science-of-philanthropy/>
<http://www.booktopia.com.au/savvy-giving-genevieve-timmons/prod9781742706900.html>
- *Our Community*, <http://www.ourcommunity.com.au/community/>

Activity 1: Evidence check list

Have we got all the project related information that we need?

Completing the following checklist will help determine if further information or research is required before your community group considers approaching potential partners.

QUESTION		YES	NO
1	Has the Audience Analysis been done so that the reason for the project is clear? Can the need be demonstrated and verified?		
2	Has the issue been analysed, through an Objectives Analysis?		
3	Have all other ideas and options been considered to address the issue, through an Options Analysis?		
4	Is the Executive Summary short and clear?		
5	Do we have a short, interesting Project Title?		
6	Is the need or issue presented in a clear, concise and accurate way?		
7	Is the Project Outline simple, comprehensive and persuasive?		
8	Can we evidence how this project is Sustainable?		
9	Does the Project Budget include all incoming and outgoing costs?		
10	Are the Project Outputs clearly defined?		
11	Are the expected Project Outcomes identified and clearly presented?		
12	Are we clear about how we will report on our activities for our Project Acquittal? Do we know what we need to collect or do (e.g. taking photographs, posting regular blogs)?		
13	Are there potential impacts that this project might generate or contribute to?		
14	Has relevant Supporting Material been sourced and reviewed?		
15	Has a Cover Letter been drafted ready for tailoring to each partner?		
16	Is the proposal expressed in plain English? Has an 'outsider' checked it to make sure that information about the project is clear and easy to understand?		

If you have answered 'yes' to all these questions, it is time to start identifying potential partners and making your case for a partnership.



section 2

about the partners

Seeking appropriate partners for your project within or beyond the community can have many benefits. It can help realise and deliver on locally developed initiatives. It can also build relationships and connections within and beyond the community. This may lead to greater awareness of the issues addressed by the project, as well as interest and further collaborations from other like-minded organisations.

The term 'appropriate partnerships' is used throughout this Guide and refers to those companies, organisations, government agencies, philanthropic bodies and individuals that share similar values to your community group and which understand and support the goals of the project. It also suggests that a relationship will be long term. Some organisations will have an ongoing involvement in your community, while others may operate for a set time. Generally speaking, the longer the association, the more likely it is that the various parties will be able to work constructively and collaborate on aims, activities, outputs, outcomes and impacts.

2.1 Who are potential partners?

Partners can come from a range of areas, including from the most unlikely places. In this Guide, partners are considered as those organisations looking to have an ongoing involvement in the community. They may share a connection or interest with the local community because of their business, service delivery or a historical connection. It could also include a person who becomes interested because of the nature and purpose of the project.

Depending on the experiences, history, background, local knowledge and resources of the potential partner, most will need to be approached by your community group. It helps if there are personal or professional connections to start this process or if introductions by others can be made. Having some connection, even if it is a referral, can help a community group approach potential partners. Being able to talk directly to a potential partner gives your community group an opportunity to give the story of your work, why you are passionate about it, what changes you are hoping to make in the community and the benefits and value for potential partners.

This approach can help in all partnership discussions but especially if the potential partner is not necessarily connected to the community in a practical day to day sense. An example may be a major supermarket engaging a third party to use the stock routes to graze their beef cattle for sale in their supermarkets. Or, it may be that your community is close to part of a national highway or trucking route and while there is a reliance on your community for fuel and good roads, the trucking companies do not have a hub or base and therefore don't always stop and don't necessarily contribute to projects of shared interest. In these examples, the supermarket chain, transport company or those they contract might need an introduction to the community. In many cases, the local community needs to do this.

Partners may include:

1. **Private or publicly listed companies** based within the local area or who rely on resources, skills or access from the local area for their business;
2. **Small businesses** servicing the community and surrounding area;
3. **Government agencies** (local, state and federal) based in the area or visiting the region;
4. **Service organisations** (publicly and privately funded), from health services to infrastructure providers;

5. **Not for profit organisations** involved in the area on specific projects;
6. **Philanthropists (individuals), trusts and foundations**, including private funds with an interest in the area and or project.

Ideally, a partnership would gather together a number of like-minded organisations to work together to address a pressing local issue. It might also be that, through a well developed project proposal, multiple representatives/ organisations from within each sector might choose to collaborate. This would, of course, need careful management.

2.2 Where could interest for our project come from?

When a well developed project addresses an important issue, interest will come from potential partners for many reasons.

It may be because the project:

- is relevant within, and potentially beyond, the community;
- provides a practical and innovative way to address the issue;
- offers direct benefit to those the project seeks to help, to the community and has the potential for lessons learned to go beyond the immediate community;
- demonstrates tangible business and/or social benefits for potential partners;
- enhances the reputation of the partners;
- provides a solution for the potential partner, enabling them to become engaged with the community;
- reduces ongoing pressure for event sponsorship; and
- supports similar or related projects being addressed by others.

Who and where might the resources come from?

Some not for profit organisations decide who they will partner with based on the way the companies, sponsors and organisations raise their revenue. Common examples cited of this are gambling or tobacco revenue.

It is important that community groups working on local projects feel comfortable with the values and reputation of the potential partner. It is also important that if money is requested for social benefit, there is a shared and agreed understanding as to how that money has been generated.

This requires significant and detailed research by the community group. For example, mining, resource processing, construction, manufacturing, forestry, agriculture, tourism, health care, transport, education, training and the arts are diverse industries with many participants. All offer opportunities for partnerships, particularly if these sectors are in your community. It requires detailed research to understand the sector and individual companies. Do their priorities, values and goals fit with your project?

It takes time to look at the sector and those within it. It also means opportunities are not lost. Research can include website reviews, creating Google Alerts on all related activities, doing wider reading, attending networking events and subscribing via Facebook, LinkedIn or Twitter to receive updates from various companies, related industry associations, companies and others.



2.3 Defining what you want from partnering with others?

Before you start identifying specific potential partners, your community group needs to define what it wants from any possible partnerships and the sort of partners you are looking for.

For example, are you seeking partnerships for:

1. Resources (expertise, support and money); or
2. Influence and networks beyond current connections; or
3. Introductions to different sectors; or
4. A commercial / service / supply arrangement; or
5. Access to other people who would be interested in the results of the project; or
6. Political reasons; or
7. Sustainability, through a long-term partnership; or
8. All or some of the above.

What is required from each partner should be clear in the Project Outline. It should be outlined in detail in the Project Budget, which should set out what specific resources are required.

Knowing what you need for the project to be successful will help identify all the types of partnerships required and also help you refine your request to each potential partner.

Activity 2: Project partner check list

Will your project interest others?

Following are some questions your community group should consider to help determine whether the project will be of interest to potential partners:

QUESTION		YES	NO
1	Are there specific and defined aspects about this project would be of interest?		
2	Are partners already involved?		
3	Have we connected to others within the community who are involved in similar or related work to ensure we present a united front?		
4	Has the project received or is likely to receive grants from government or non-governmental organisations?		
5	Have we defined the 'value' for the potential partner to be involved? Does it help them deliver their goals, improve their reputation or provide a solution to enable them to give easily to a good project?		
6	Who are the people proposing the project? Are there conflicts of interest between our community group and the potential partner (e.g. ideological, political, competitive interests)?		
7	Have we reviewed our own networks to see who we know, who we could approach or who we could be introduced to?		
8	Are there any private donors, philanthropists or senior executives who live in the community or are connected on a personal level to our community?		
9	Is it clear who the project will help? This will help define who might be interested to provide resources.		
10	Is there potential for this project, its findings or elements of the project to be transferred to other communities in a rural, regional or metropolitan setting?		
11	Are there existing sponsors, organisations or companies undergoing change and looking for new opportunities to promote their activities that fit with our project?		
12	Is there a change in local Council or its priorities? Is there an opportunity to review Council priorities and contribute new ideas that support our activities?		
13	Are there state and federal government programs, initiatives or announcements that can be used to support our project?		
14	Are there local events and activities that can be connected with our project?		
15	Are there organisations looking to establish long term partnerships in our community? Do we have connections to these companies?		
16	Are there other local or regional projects that are regularly supported and are an example of a successful partnership within our community?		



2.4 How to find potential partners?

Identifying potential partners can be challenging. Often it relies on thorough research, using personal and extended networks and seeking out new ways to connect to others.

Some partners will be obvious, others may take a little more time to uncover and some may only come to light when other parties come on board.

A systematic way to approach the issue is to use an asset-based partner attraction mapping process. This provides a structure to identify and list all potential partners, based on the existing resources, experiences, background, values and history of the community. It also helps identify existing or potential organisations that 'fit' with your project and community group. A similar approach is used for asset-based investment attraction to encourage global capital to a country, region or community.

The benefits of undertaking an asset-based approach include:

1. Providing a detailed and systematic approach to identifying potential partners;
2. Ensuring all members of the community group are clear about who is being approached and what is being requested;
3. Identifying those potential partners who share similar values, culture and focus with the community;
4. Informing the broader community about your project by preparing clear and compelling information about what you are doing and why;
5. Building a collaborative model of engagement with the broader community, especially if community members will be called upon to give their ideas and share their networks;
6. Making relevant companies, organisations, service providers, government agencies and the philanthropic sector aware of your work in a planned and consistent way;
7. Connecting with other networks to share information on areas of common interest and to promote your project;
8. Providing a model for other community groups;
9. Promoting your community / town / region to a wider audience; and
10. Providing consistent and regular material about your project to all interested parties.

2.5 Mapping potential partners

At this stage, you will have some ideas about who might be appropriate partners for your project. Completing *Activity 2: Project partner check list*, will have focussed discussions as to which organisations might be interested and willing to be involved.

The next step is to develop a planned approach to research all potential opportunities. This approach should capture detailed information on the organisation, as well as begin to map those connections and networks that might link you to other organisations beyond the community.

To help organise the research, you can group your potential partners into three categories:

1. **Direct opportunities:** Organisations (and individuals) already operating within the community or local region from any area or sector;
2. **Indirect opportunities:** Organisations (and individuals) connected to the community but not necessarily based within the community. Their involvement may be through the supply of goods and services, use of resources, hosting events, providing funding and engagement or awareness due to their involvement with another project within the region;

3. **New opportunities:** Organisations (and individuals) who, while not physically connected to the community, are likely to be interested in your project because of their profile, previous work and/or publicly released reports or statements of intent.

2.5.1 Direct opportunities

Identifying direct opportunities is often the easiest to do as these groups and individuals are already in your community. Members of your community group, through their volunteering, professional life and personal connections, will be aware of many organisations, companies, small businesses, government agencies, service providers, private philanthropists and others that participate and contribute to the community.

It is possible that there will also be direct opportunities from individuals, private donors or others who are able to provide assistance but, for their own reasons, do not choose to publicise their involvement or giving. While learning about these people often requires more work, using a systematic approach to review and record potential contributors through the asset-mapping process will help.

2.5.2 Indirect opportunities

Identifying and assessing indirect opportunities from organisations connected to the community, but not necessarily based within the community, is likely to involve more desk-based research. Their involvement within the community may be long-term and across a range of areas, however, they might not have an office or base within the community. In this way, they are less visible on a day-to-day basis. They are likely to have some familiarity with the community from a business, service, government, giving or social perspective. They are also likely to be contributing in some way. If not, they will probably be interested to be involved.

2.5.3 New opportunities

Identifying and developing new opportunities mainly refers to individuals, organisations, companies, associations and government that are likely to be interested in your project but not based in the community. Your knowledge that they may be interested in your local project will come from researching their profile, previous work and interests, publicly released reports or statements of intent, media comment from senior people within the entity and with government, through the availability of eligible government grants. New opportunities might also extend to crowd sourcing for local projects.

2.6 The asset-based partner attraction mapping

The asset-based partner attraction mapping process is led by the community group proposing the partnership. Using this approach will uncover a lot of material that will be useful to others. It is therefore encouraged that there is unanimous agreement by the community group as to how the information will be sourced, used and updated before research begins. If there is broad community support for this approach, and agreement to share the findings, it might be that each interested group or representative organisation might contribute time to help with this research.

This approach works best if the reason why the partnership is being sought is clearly defined. Gaining this information and mapping the networks are likely to be of benefit to other projects and other groups.

With the reason(s) and request(s) for the partnership clearly defined, your search for project partners can begin in earnest.

Drawing from the strategies in Activity 3, you can develop an approach that suits your timeframe, resources, budget and volunteer hours.



Activity 3: Undertaking asset-based partner attraction mapping

There are three parts to this process:

Part 1: Capturing the information

Provides ideas to capture the information for your local community project. How much an individual community group will do to map the various organisations and potential partners will be determined by the project's objective and the group's interests.

Part 2: Possible contacts for direct and indirect opportunities

Presents a list of sectors and groups that often exist in a community (depending on the size of the community). Looking within the community first for links, connections and networks is the premise of the asset-based partner attraction mapping process. While these groups may not all be able to provide resources, their engagement with your project – or at least awareness of it – will ensure that when partnerships develop there is more likely going to be shared, community-wide awareness and acceptance.

Part 3: Identifying new opportunities

Offers suggestions and ideas, including useful website links to other resources and related activities.

Part 1: Capturing the information

When you have identified an organisation to propose a potential partnership, it is important to undertake some preliminary research and record the following information:

Contact details

1. *Name:* of the organisation / individual
2. *Type of connection:* (Direct, Indirect, New)
3. *Contact details:* for the organisation / individual (website, email, address, telephone number)
4. *Contact person:* Identify the person to contact (record their name, position and contact details).

Evidence gathering

1. *Website research:* Review the organisation's website to identify and record (in the organisation's own words) those issues or activities they are interested in, especially the future directions.
2. *Internet:* Extend your online research to see what others say or have done with the organisation. This might also reveal a broader group of potential partners or allies.
3. *Reports:* Review any publicly available reports, including annual reports or histories, to understand the culture and values of the organisation. Look for areas of common purpose and shared values.
4. *Subscriptions:* Subscribe to the organisation's Facebook page, LinkedIn profile, blogs and Twitter feeds (if available) to get regular updates of their activities and interests.

Testing

1. *Interest:* Based on this evidence, detail the reason(s) why the identified individual or organisation might be interested in your project. Be specific; for example, 'to provide professional assistance to develop greater access by all sectors of the community to the outdoors for physical fitness and social engagement' or, 'to provide \$35,000 each year for three years to partly fund a project officer for our multicultural program'.
2. *Eligibility (community group):* Is your community group eligible to receive assistance? For example, do you have the appropriate structure (i.e. an ABN, an incorporated body, DGR status or affiliated with a DGR organisation)?
3. *Eligibility (issue):* Do they give or support in the areas that accord with your request / interest?
4. *Eligibility (area):* Do they give or support in the state or territory where you are located?

Forming the foundations for the partnership

1. *Previous involvement:* List any involvement, engagement or funding provided to your community and/or community group by the identified individual or organisation.
2. *Current connections:* Determine if any members in your community group have a connection or association with the identified individual organisation (e.g. is there a professional connection through work or a business association or a personal connection through school, sport or religious groups?).
3. *Building connections:* Attend events, Council meetings and local programs to make connections and build networks of support for your project.

The asset-based partner attraction mapping form

QUESTIONS AND RESEARCH ISSUES	ANSWERS / DETAILS
Contact details	
1. Name of the organisation/individual:	
2. Connection (Direct, Indirect, New):	
3. Contact details:	
4. Contact person:	



QUESTIONS AND RESEARCH ISSUES	ANSWERS / DETAILS
Evidence gathering	
1. Website research:	
2. Internet research:	
3. Reports:	
4. Subscribing (Facebook, Twitter, blogs):	
Testing	
1. Interest:	
2. Eligibility (community group):	

QUESTIONS AND RESEARCH ISSUES	ANSWERS / DETAILS
3. Eligibility (issue):	
4. Eligibility (location/area):	
Forming the foundations for the partnership	
1. Previous involvement:	
2. Current connections:	
3. Building connections:	



Part 2: Possible contacts for direct and indirect opportunities

Looking local is the most efficient way to identify potential partners.

Depending on the focus of your project, there are a range of organisations, voluntary groups and individuals within or connected to your community that could be potential partners or allies. Even if an individual or organisation does not come on as project partner, they could introduce you to others or provide access to new networks.

Following is a range of sectors (listed alphabetically) that may exist in your community and might be a starting point for these discussions.

Arts and cultural organisations	For example: drama, arts and crafts organisations, galleries, art / cultural events, including those groups that host an annual event or biennial event.
Business and business organisations	For example: all businesses, large and small operating within or connected to your community (refer to local newspapers for listings / advertisements or a New Residents Guide), chambers of commerce, business networking organisations, progress and development associations, business hubs, small business enterprise centres, rural transaction / service centres, economic development associations.
Charitable groups and causes	For example: Community Funds / Foundations, VIEW Clubs, Rotary, Probus, Country Women's Association.
Civic event organisers	For example: Social committees of schools, councils, workplaces.
Counsellors	For example: youth, school, crisis, rural, financial.
Educational institutions	For example: preschools, primary and secondary schools, before and after school care centres, child care centres, higher education and registered training organisations.
Emergency services	For example: police, fire, ambulance, State Emergency Service (SES), coastguard.
Financial services	For example: mainstream and community banks, community foundations, banks, credit unions and societies, societies of accountants.
Health and community health services	For example: hospitals, emergency health services, community health services, specialists, multipurpose health centres.
Indigenous corporations, associations	For example: Elders, National Congress of Australia's First Peoples representatives, Land Councils, local councils, Indigenous-specific employment programs and initiatives, ranger groups.
Industry	For example: Major employers, government (particularly State and Federal), major service providers, corporations, utility organisations.
Libraries	For example: Libraries of public and educational institutions including access to online journals of specific associations, council and regional development association resources.

Local community action groups	For example: other groups like yours, parents and citizen's (P&C) committees, environmental groups, residents groups, landholder associations.
Local government	For example: Elected officials, councillors and mayor, former elected officials, staff, youth councils / forums, residents or rate payers' groups.
Local media	For example: local television, newspapers, editors, reporters and journalists, photographers, radio presenters.
Men's / Women's / Youth groups	For example youth groups, Parents without Partners, Probus, CWA, also see 'Charitable Groups and Causes' earlier.
Multicultural associations	For example: migrant welfare groups, community associations catering for specific nationalities, resource centres.
Older person's groups	For example: University of the Third Age, sporting associations for older people, aged care services and providers.
Political / lobby organisations	For example: unions, branches or sub branches of political parties, lobby organisations or associations and interest groups.
Religious groups	For example: multi-denominational religious associations and groups.
Research organisations	For example: development and testing facilities for companies, agricultural research farms and centres, centres for cooperative research, research facilities of organisations, universities, environmental monitoring and weather stations.
Service clubs	For example: Returned Services League clubs.
Sporting associations and groups	For example: all sports played locally in junior and or senior leagues, visiting competitions, events / sports people attend outside of the community, sporting associations including state or territory representatives and national representative organisations.
Tourism associations	For example: local and regional associations, business groups focussed on tourism, tourism associations at the state and national level.
Veterans groups	See service clubs and also older persons groups above.
Welfare services and organisations	For example: Centrelink / Department of Human Services, Mission Australia, The Benevolent Society, Brotherhood of St Laurence, United Way, church groups and associations, refuge centres, Salvation Army.
Youth groups and networks	For example: youth and community groups, community health centres, drop-in centres, church programs for young people, local skateboard or other sporting groups, drama, youth choir, police run youth groups, youth services including schools, government services, childcare centres, family day care schemes, playgroup associations.



Part 3: Identifying new opportunities

New opportunities include those organisations, companies, government agencies and members of the philanthropic sector that not yet aware of your group or your project. They may have a current or historical connection to the community through a friend or relative or they may have no connection at all to the area. However, they may share a common interest in your project.

What might help you uncover useful new connections is to review a range of websites, subscribe to various bulletins and e-newsletters, track for developments in the free service offered by Google Alerts, engage with crowd funding for your project and draw on others in the community and visitors to the community. For example, you could leave a visitor's book (or iPad) in a common area / art gallery / cafe and invite visitors to share something they have learned about your area and leave their contact details. This material can be used for sourcing new ideas and connections, possibly through low-cost programs like Survey Monkey.

Information for potential new opportunities might come from resources previously listed in this Guide, as well as:

- Reports tabled in Council meetings detailing interest from a new business, company, organisation or government agency;
- Upcoming workshops and events, including shows, trade displays and industry promotions;
- Newly proposed projects from press releases or from initiatives that create new businesses or expand operations;
- Philanthropy Australia (<http://www.philanthropy.org.au/>) and, if access is available, review the Directory of Funders (subscriber service or through your library or an existing Philanthropy Australia member);
- Crowd funding: Pozible, <http://www.pozible.com/> AnswerCrowd, <http://www.answercrowd.com.au/index.php/home>;
- The Funding Network <https://www.thefundingnetwork.com.au/>;
- Our Community, Join In Join Up, <http://www.ourcommunity.com.au/signupdirectory>; and
- Our Community, Funding Centre, <http://www.fundingcentre.com.au/>.

project management

Managing the material

Developing partnerships can be a complex and time-consuming process. You need to maintain the momentum of the project, while reaching out to potential partners and also keeping everyone involved up-to-date with progress and new developments.

Depending on the interest and budget of the community group, there are some online resources that can support you in this work. Two useful tools are Basecamp and StratPad. Basecamp is a project management tool. StratPad is a business planning tool. Both can help in developing your project, assigning roles and reporting on activities.

Both tools are moderately priced for what they can do and the benefits they can deliver.

Basecamp <https://basecamp.com/>

Basecamp is a web-based project-management tool. It was first launched in 2004, with an updated version released in 2012. It offers to-do lists, milestone management, file sharing, time tracking, and a messaging system. There is a 60-day free trial and subscriptions start from \$20 per month, for up to 10 projects, with 3GB storage. It does not restrict the number of users so all members of your community group could access the package for \$20.

StratPad <http://www.stratpad.com/>

StratPad is cloud-based business planning software. It asks key questions about your project (or business) and generates a simple business plan and associated financial statements based on your inputs. It is a simple and practical approach. There is a free version for the iPad and small costs to upgrade. To transfer and share data via email, a higher version of StratPad is required, priced at around \$30 – \$40 as a one-off fee.

Keeping people informed

As a project develops, it is essential to have information about your project up-to-date and readily accessible. This helps build and maintain support among member of your community group, your partners and the broader community. It is also a valuable resource to engage other groups and potential partners.

Depending on your interests and resources, you could develop a Facebook page for your project. Others might want to host a website or regularly blog, tweet or provide updates in the local media. For best results, you should agree on the style of writing, use of pictures and other material and how often information is posted. It is also important to respond promptly to feedback and comments from others.

Other ideas include preparing digital stories, publishing photographs, posting videos on YouTube, preparing news releases and producing brochures or flyers. It may also include seeking out and attending local public speaking opportunities provided by service organisations and councils and networking at other events.

All of these activities have the added benefit of developing more opportunities for direct, indirect and new potential partnerships.



next steps

How a community group develops and secures its partnerships to deliver on locally initiated projects will depend on many factors. Central to this will be the approach and processes used. *Grantlines: Partnering Local Projects* seeks to provide a structure, options, ideas and references to help in this process.

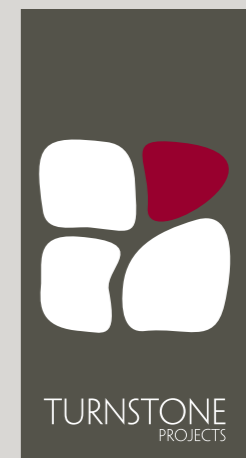
As part of this service, each community group is encouraged to access up to 30 minutes of consulting time (included in the cost of this publication) to discuss any aspect of their project or potential partnerships with Rebecca Iliffe.

With the project material developed and an initial assessment of potential partners done, the community group should feel more able to contact others within and beyond the community. It will be equally beneficial should partnership opportunities arise through council, business, service or another organisation including from the philanthropic sector interested in or becoming interested in your project and your community.

With the foundations now prepared it may be that community groups seek some external assistance to help make some connections within and beyond their community and attract those partnerships. How this is done is very much up to the community group.

I wish you well and thank you for your involvement with *Grantlines: Partnering Local Projects*. I would welcome hearing your stories and experiences using this Guide, along with any recommendations for improvement. My contact details are:

E: rebecca@turnstoneprojects.com | M: 0417 816 303 | W: www.turnstoneprojects.com



T + 61 2 9559 5352
M 0417 816 303
F +61 2 9559 7949
W www.turnstoneprojects.com
E rebecca@turnstoneprojects.com
P PO Box 140
Summer Hill NSW 2130
Australia

