

Keystone Tools



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Keystone Tools

In a nutshell

What are these tools and who are they for? A selection of the most important tools from the Take Note [Collaboration Guidebook](#) that enable individuals and social change organisations to achieve the strongest possible collaborations and deliver the greatest possible impact.

Why are they needed? Collaboration can put immense pressure on time, resources and energy. It can be challenging to establish and achieve a shared vision, to communicate effectively and to achieve equity in a partnership. These tools are designed to help.

What can they help to achieve? Collaboration has the potential to find joined-up solutions to shared challenges and transform our collective power to make change. It enables partners to diversify their reach and amplify their ambition. The process of working with others shares and democratises knowledge and expertise. And it builds strong foundations for real, long-lasting impact within communities and beyond.

Who created them? The tools shared here have been created by partnership pioneers, Take Note. For over three years, Take Note has been developing a partnership approach that better enables community innovators and organisations to deliver joined-up, long-lasting impact. The tools in this guidebook evolved from this period of action research and have been co-created with community-based partners every step of the way.



Wow, what an incredible journey Partner Up has enabled us to take. We've made new allies, pushed our creativity further than we thought possible and enabled our young people to grow their creative aspirations in a way that previously seemed beyond their reach.

Bruk Up Stigma, Take Note partner organisation

The Collaboration Journey

These tools are the keystones of Take Note's [Collaboration Guidebook](#), which contains a wider selection of tools for every stage of the collaboration journey. We have selected one essential tool for each of the five stages - but we recommend exploring the whole guidebook for more tips and resources!



Take Note's approach ensured we had mutual buy-in as a group, total understanding of the project's aims and outcomes, and were all equally invested in it, which brought huge benefits. Through Take Note's additional strategic support there was a framework created to hold us as three organisations, and I have never experienced that to such an extent before.

Suffolk Artlink, Take Note partner organisation

Preparing for your Partnership Journey



“

In the charity sector we are often asked to work in partnership, and it is assumed that we will just get on with it, which is why these partnerships break down. Having the time to clarify roles and explore what each of us wanted to achieve was a good way of making sure that we were all clear on the aims and objectives of the project before the funding was distributed. I have seen many well-intentioned groups break down because people did not share the same values and were not clear on what they were trying to achieve.

Bath City Football Club, Take Note applicant

Great! You have an idea for a project.

Before you go any further and start talking to partners, have a go at answering the following questions interally within your organisation.

What is the challenge in our community that we're addressing?

What change do you hope to see in your community?

What activities would we deliver to make this change?

Which partners can help us make this happen?

What are the potential risks of working with these partners?

How could the project be funded?

Introducing the Impact Map



The project was not easy as we aimed to engage participants that needed a lot of support and care. Having developed a theory of change, we had a clearer sense of the outcomes we were hoping to see in participants and so we were able to develop a shared methodology for how we could measure whether these outcomes had been achieved.

Suffolk Artlink, Take Note partner organisation

What do we mean by 'impact'?

We define impact as the change - positive or negative - that happens as the result of a project or intervention. Take Note's approach supports people working together to achieve a positive social impact, improving the lives of individuals and the wider community.

What is an Impact Map?

Every journey has a destination, and you'll need a map to get you there. Take Note defines an Impact Map as an illustration of **how** and **why** a change is expected to happen due to a particular activity. This is also known as a Theory of Change or Logic Model.

How can it support your collaboration?

It helps you define your shared vision and the steps to get you there: what challenge you're addressing, what you're delivering and what you're trying to achieve. It's important that every partner has the opportunity to take part in this process.

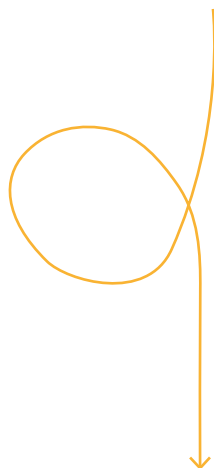
Why bother?

Partnership projects can be complex. Working together to design your Impact Map will:

- Give your project a collective focus, connecting its design directly to its impact and ultimate vision
- Provide your project with a delivery framework that everyone can refer to
- Help you design a clear evaluation framework

How do we create an Impact Map?

There are lots of ways to do this. This guide will take you step-by-step through the process, and is based on Take Note's tried and tested work with community partners. However you decide to do this, the most important thing to remember is that you should do this together!



Understanding the Impact Map

Here's an example of what an Impact Map might look like:

Creative Communities, New Perspectives is a cross-sector partnership in Gloucester to boost mental health and wellbeing through mindful photography and drama.

Challenge(s)	Project Delivery			Outcomes	Mission & Vision
	Activities	Experiences	Outputs		
<p>What challenge(s) faced by our community are we trying to tackle?</p> <p>Covid 19 has had a significantly negative impact on already vulnerable members of the community in relation to mental and physical well-being.</p> <p>Community members are increasingly isolated, disconnected from one another and suffering from depression, anxiety, uncertainty, loss of self-identity and self-belief.</p>	<p>Two 6-week mindful photography courses for adult community members</p> <p>One 6-week mindful photography course for young people</p> <p>Inclusive drama 'arts for health' workshops</p> <p>Signposting to partner activities</p> <p>Preparing an exhibition</p>	<p>Feel connected to others in the group</p> <p>Engaged with the world / nature around them</p> <p>Feel present and in the moment</p> <p>Feel inspired / excited / curious</p> <p>Feel valued - they have a voice which is respected</p> <p>Feel safe and calm</p> <p>Respect different voices</p>	<p>Photo exhibitions and projections in public spaces</p> <p>Performances of drama: 'arts of health'</p> <p>Participants' artwork portfolios</p>	<p>Shorter term: Participants will:</p> <ul style="list-style-type: none"> - Feel less isolated - Build more connections with each other and the city - Greater understanding of mindfulness - Develop new skills - Increase confidence in their creativity - Increase sense of self-achievement - Increase sense of gratitude, compassion for self, others & place <p>Longer term: Participants will:</p> <ul style="list-style-type: none"> - Improve confidence and self-esteem - Reduce stress and anxiety - Feel safer in the city - Increase health and wellbeing - Be more motivated to access green space and utilise those spaces for wellbeing - Be more confident to try other arts activities <p>Audiences will:</p> <ul style="list-style-type: none"> - Change their perceptions of others living in their city <p>Project organisations will:</p> <ul style="list-style-type: none"> - Be more visible in the city - Widen participation in their other activities 	<p>Mission: Creative Communities, New Perspectives creates new connections between people and with the beauty of Gloucester, fostering well-being and breaking down barriers through mindful creativity, now and in the future.</p> <p>Vision: Gloucester communities that are more connected to each other and to the city through the transformative, healing power of mindful creativity.</p>

The Impact Map takes you from A to B, from your starting point to your destination - your Challenge to your Mission and ultimate Vision.

Here's what we mean by the terms used in the example:

Challenge:

What challenge faced by our community are we trying to tackle?

This is the reason you're doing the project and why you're doing it now.

Activities:

What are we doing during the project?

These are the concrete steps taken to produce the outputs and achieve your outcomes.

Experiences:

What do we want people to be thinking, feeling or doing while they experience the project?

These are ways people will engage with the activities that make your outcomes more likely.

Outputs:

What will we have created or what events will have happened by the end of the project?

These are tangible products or events that result from your activities. They're usually concrete and countable.

Outcomes:

What impact do we want to make by doing the project?

This is the concrete, measurable impact affecting the people you're working with.

Short and Long Term:

What impact do we expect to see sooner rather than later?

These definitions will depend on the length of your project. A good way to think about this is the difference between impact that happens during the project (short term) and after the project has ended (long term).

Mission:

What sustained impact do we hope the project will deliver in the longer term?

The mission sets out the role this specific project will play to achieve your ultimate vision (you may already have a mission statement for your individual organisation but this project mission should be directly related to the work you are doing together).

Vision:

What is the ideal state for our community / society that our group is seeking?

The vision sets out about your collective aspirations and what the group ultimately hopes this project could contribute to achieving - maybe years into the future. It should infuse the group with a sense of purposeful action and motivation.

Here's a template for you to use as you start to bring your Impact Map together:

Challenge(s)	Project Delivery			Outcomes	Mission & Vision
<p>What challenge(s) faced by our community are we trying to tackle?</p>	<p>Activities</p> <p>What are we doing during the project?</p>	<p>Experiences</p> <p>What do we want people to be thinking, feeling or doing while experiencing the project?</p>	<p>Outputs</p> <p>What will we have created / what events will have happened by the end of the project?</p>	<p>What changes do we want to make through the project?</p> <p>Short Term?</p> <p>Long Term?</p>	<p>What change / impact do we hope the project will have longer-term?</p> <p>What is the ideal state for our community / region / society to which you aspire?</p>

Designing your Impact Map

This is something that will have greatest impact if you do it together!
It's important that everyone feeds in - and that everyone is invested in
the map you agree for your project.

Contents

Step 1 [Refine your why](#)

Step 2 [Develop your how](#)

Step 3 [Complete your Impact Map](#)

Step 1

Refine your why

This covers the **Challenge, Vision, Mission** and **Outcomes** sections on your Impact Map. It's likely that these Challenge, Vision and Mission statements will take some further refinement so allow plenty of time to discuss as a group. A quick recap of these terms:

Challenge: This is the reason you're doing the project, why now and why there is a need for it.

Mission: The mission sets out the role this specific project will play to achieve your ultimate vision.

Vision: The vision sets out your collective aspirations, the ideal state of your community in the future.

Before you begin, ask each partner to:

- Read through **Introducing the Impact Map** and take a look at the completed **Impact Map** example
- Write their own version of the Challenge, Vision and Mission statements for this project
- Work out the short-term (during project) and long-term (after project) Outcomes they hope to achieve

During:

Start off with your **Challenge, Vision and Mission** statements:

1. Give each partner a minute to present to the whole group why they personally feel the project is needed (the **Challenge**), what impact they hope it will ultimately have (the **Vision**) and what the project's role will be in delivering this change (the **Mission**)
2. Discuss as a group the themes that emerge from the individual presentations
3. Consolidate these themes into a shared Challenge, Vision and Mission statement

Once you have this nailed down, it's time to move on to your Outcomes:

1. Break the discussion down into potential areas of change for your target group:
 - a. New knowledge and / or skills they will gain (e.g. develop photography skills)
 - b. New attitudes they will develop (e.g. increased willingness to take part in creative projects)
 - c. New behaviours they will learn (e.g. reduce stress and anxiety)
2. Divide into three groups and focus on **knowledge**, **attitudes** and **behaviours** respectively. In your three groups, note down as many outcomes as you can think under your heading.
3. Come back together and pool your ideas
4. Check that these are framed as outcomes: aim for change words like 'increased' or 'improved'
5. Assign the list of outcomes to either short-term outcomes or long-term outcomes
6. Prioritise the outcomes that are the most important to you and are most relevant to this project

Don't worry at this stage how you might evaluate and measure these outcomes - this can come later!

After:

Share your updated Impact Map with all of your partners with the Challenge, Vision, Mission and Outcomes sections completed. Make sure that everyone is happy with the text before moving on.

Here's an example! You can download a blank template of this Impact Map from the Take Note website.

Challenge(s)	Project Delivery			Outcomes	Mission & Vision
<p>What challenge(s) faced by our community are we trying to tackle?</p> <p>Covid 19 has had a significantly negative impact on already vulnerable members of the community in relation to mental and physical well-being.</p> <p>Community members are increasingly isolated, disconnected from one another and suffering from depression, anxiety, uncertainty, loss of self-identity and self-belief.</p>	Activities	Experiences	Outputs	<p>Shorter term: Participants will:</p> <ul style="list-style-type: none"> - Feel less isolated - Build more connections with each other and the city - Greater understanding of mindfulness - Develop new skills - Increase confidence in their creativity - Increase sense of self-achievement - Increase sense of gratitude, compassion for self, others & place <p>Longer term: Participants will:</p> <ul style="list-style-type: none"> - Improve confidence and self esteem - Reduce stress and anxiety - Feel safer in the city - Increase health and wellbeing - Be more motivated to access green space and utilise those spaces for wellbeing - Be more confident to try other arts activities <p>Audiences will:</p> <ul style="list-style-type: none"> - Change their perceptions of others living in their city <p>Project organisations will:</p> <ul style="list-style-type: none"> - Be more visible in the city - Widen the participation in their other activities 	<p>Mission: Creative Communities, New Perspectives creates new connections between people and with the beauty of Gloucester, fostering well-being and breaking down barriers through mindful creativity, now and in the future.</p> <p>Vision: Gloucester communities that are more connected to each other and to the city through the transformative, healing power of mindful creativity.</p>

Step 2

Develop your how



The second part of the session together should cover the **Activities**, **Experiences** and **Outputs** sections on your Impact Map.

Before this part of the session, ask each partner to:

- Write down the Activities and Outputs they will be able to contribute to the project
- Think about how the target group will experience the activities

During:

Activities: Here are some questions you could use to drive your discussion:

- Do these activities address the needs of beneficiaries of the different partners represented?
- Do these activities make the most use of the combined expertise in the room?
- Is there anything else a partner might be able to offer by way of additional activities?

Experiences: once you've figured out what you'll be delivering, start to think about how your target group will experience these Activities. Ask each partner to share what they think are the most important experiences for their target group and discuss where the overlaps are between partners.

It's sometimes easy to overlap Experiences and Outcomes. The best way to think about it is:

- an **Outcome** stays with someone beyond the project itself
- an **Experience** happens in the moment and ultimately (and hopefully) supports the successful delivery of an outcome.

For example, people are more likely to 'increase confidence in their creativity' (an outcome) if they 'feel safe and supported' (an experience) during the activity.

Outputs: these are the tangible events, products or services that you will result from your activities (e.g. a concert, a mural, an exhibition, a football tournament) and that will have happened by the end of the project. They're usually concrete and countable.

- Do you agree as a group that the output targets are manageable? Make sure you collectively create space and support for all those present to put forward ideas and share any concerns.
- Are there specific elements you can offer the whole group that will support delivery of these outputs e.g. venue space for a performance, contact with a local film-maker? Don't worry about figuring out how you'll deliver these outputs, that will come later in your planning process.
- Do the outputs listed make the maximum use of the combined skills and experience in the room?

After:

Share your updated Impact Map with all of the partners with the Activities, Experiences and Outputs sections completed. Make sure that everyone is happy with the text before moving on.

Here's an example:

Challenge(s)	Project Delivery			Outcomes	Mission & Vision
	Activities	Experiences	Outputs		
<p>What challenge(s) faced by our community are we trying to tackle?</p> <p>Covid 19 has had a significantly negative impact on already vulnerable members of the community in relation to mental and physical well-being.</p> <p>Community members are increasingly isolated, disconnected from one another and suffering from depression, anxiety, uncertainty, loss of self-identity and self-belief.</p>	<p>Two 6-week mindful photography courses for adult community members</p> <p>One 6-week mindful photography course for young people</p> <p>Inclusive drama 'arts for health' workshops</p> <p>Signposting to partner activities</p> <p>Preparing an exhibition</p>	<p>Feel connected to others in the group</p> <p>Engaged with the world/nature around them</p> <p>Feel present and in the moment</p> <p>Feel inspired / excited / curious</p> <p>Feel valued - they have a voice which is respected</p> <p>Feel safe and calm</p> <p>Respect different voices</p>	<p>Photo exhibitions and projections in public spaces</p> <p>Performances of drama: 'arts of health'</p> <p>Participants' artwork portfolios</p>	<p>Shorter term: Participants will:</p> <ul style="list-style-type: none"> - Feel less isolated - Build more connections with each other and the city - Greater understanding of mindfulness - Develop new skills - Increase confidence in their creativity - Increase sense of self-achievement - Increase sense of gratitude, compassion for self, others & place <p>Longer term: Participants will:</p> <ul style="list-style-type: none"> - Improve confidence and self esteem - Reduce stress and anxiety - Feel safer in the city - Increase health and wellbeing - Be more motivated to access green space and utilise those spaces for wellbeing - Be more confident to try other arts activities <p>Audiences will:</p> <ul style="list-style-type: none"> - Change their perceptions of others living in their city <p>Project organisations will:</p> <ul style="list-style-type: none"> - Be more visible in the city - Widen the participation in their other activities 	<p>Mission: Creative Communities, New Perspectives creates new connections between people and with the beauty of Gloucester, fostering well-being and breaking down barriers through mindful creativity, now and in the future.</p> <p>Vision: Gloucester communities that are more connected to each other and to the city through the transformative, healing power of mindful creativity.</p>

Step 3

Complete your Impact Map

Once each column is complete, we recommend tracking through the thinking on your Impact Map from left to right - to make sure each step of the process connects to the next.

If something doesn't seem to connect with the rest of the Impact Map, discuss with your partners whether you should include this as part of your project.

Challenge(s)	Project Delivery			Outcomes	Mission & Vision
<p>What challenge(s) faced by your community are you trying to tackle?</p> <p>Covid 19 has had a significantly negative impact on already vulnerable members of the community in relation to mental and physical well-being.</p> <p>Community members are increasingly isolated, disconnected from one another and suffering from depression, anxiety, uncertainty, loss of self-identity and self-belief.</p>	Activities	Experiences	Outputs	<p>Shorter term:</p> <p>Participants will:</p> <ul style="list-style-type: none"> - Feel less isolated - Build more connections with each other and the city - Greater understanding of mindfulness - Develop new skills - Increase confidence in their creativity - Increase sense of self-achievement - Increase sense of gratitude, compassion for self, others & place <p>Longer term:</p> <p>Participants will:</p> <ul style="list-style-type: none"> - Improve confidence and self esteem - Reduce stress and anxiety - Feel safer in the city - Increase health and wellbeing - Be more motivated to access green space and utilise those spaces for wellbeing - Be more confident to try other arts activities <p>Audiences will:</p> <ul style="list-style-type: none"> - Change their perceptions of others living in their city <p>Project organisations will:</p> <ul style="list-style-type: none"> - Be more visible in the city - Widen the participation in their other activities 	<p>Mission:</p> <p>Creative Communities, New Perspectives creates new connections between people and with the beauty of Gloucester, fostering well-being and breaking down barriers through mindful creativity, now and in the future.</p> <p>Vision:</p> <p>Gloucester communities that are more connected to each other and to the city through the transformative, healing power of mindful creativity.</p>
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Share your completed Impact Map with all the partners, as you'll be referring back to this all the way through your project.

Approaching Partnership Power Dynamics

Diversity in partnerships adds huge value. But it can also create differences in power - through variations in partners' size, responsibility, financial allocation, capacity, experience, profile and status.

This is a simple set of prompts to help you achieve more equitable ways of working together by explicitly addressing this from the start. It will enable you to assess honestly where power imbalances might lie, discuss how these might affect your partnership and find mitigations where possible.

As part of your first Huddle, create space to talk through anything that arises from this process. You can use these prompts and your responses as a framework for a conversation.

- Think about the extent to which each of these areas could become an issue within your partnership group, along with any possible mitigations.
- Use the scale to give you a sense of whether these pose a high risk for your group (5) or low risk (1).

Size

Does the difference in size, resources and capacity of the partners affect the influence they have in the group or the way in which they are going to be able to engage with the project?



Roles and responsibilities

Are different partners contributing different amounts of resource to the partnership? Will this impact the level of engagement with the project?



Financial allocation

Is the budget allocated to each partner proportionate to the work they'll do to make the project happen? Are all partners fairly compensated for their time spent on the partnership (as well as on project planning and delivery)?



Experience

Are there different levels of experience between the key individuals leading this project from each partner? Are we able to leverage specific expertise from individual partners across the collaboration?



Profile and status

Will the marketing / communications / awareness of this project be dominated by the partner with the biggest profile? Are we able to support each other to ensure all partners are spotlighted and included?



What are you aiming for?

If you have an equitable collaboration, it's likely to look something like this:

- We have regular, open communication where all partners feel listened to
- All partners feel that their contributions are appreciated
- Partners' roles in decision-making and areas of responsibility are clear
- Any challenges that arise are dealt with in a way that partners are comfortable with
- Plans are in place for sharing the leadership of the partnership e.g. rotating the chairing of group meetings

Once you've moved onto the next stage and you are up and running, you can use the **Refining Collaborative Values** tool to help you work out more practical ways to approach your work together and mitigate the risks of unbalanced power dynamics and possible conflict.

Remember, a collaboration may never achieve equality - there are inherent and indeed necessary differences between partners that enhance the collaboration's value. But equity is important: to recognise and respect that each partner is working in a different context and contributing differently to the partnership, and to make sure that the resources and support they're given to do this is proportionate and fair.

Partnership Agreement



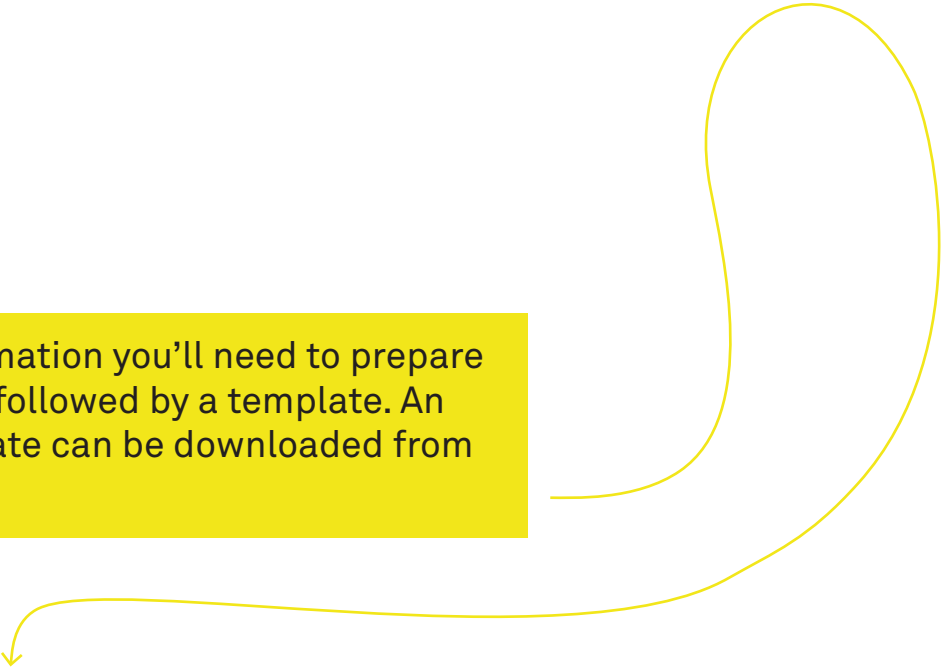
We had to always bring our focus back to what we were trying to achieve - different partners had different priorities that ran alongside this project's intended outcomes - the approach helped us maintain focus.

Trelya, Take Note partner organisation

Signing a Partnership Agreement is essential in making sure all partners fully understand their roles and responsibilities. This is the most formal element of the whole process, but will avoid issues down the line if things don't go to plan - particularly regarding finances. You should check back in on this agreement regularly throughout the project to make sure you're on track.

There are many variations of this document, and it may be that you or one of your partners already has a version to use here. The template developed by Take Note captures some of the key points to cover, bringing together information from a number of tools in this guidebook - however there will be other information that you, your team or your partners might want to include.

Next we outline the key information you'll need to prepare your partnership agreement, followed by a template. An editable version of the template can be downloaded from the [Take Note website](#).



Statement of Intent

This sets out what the document is and who it relates to. You'll need:

- **Timeframe:** when the partnership starts and ends.
- **Partners:** who are the main and second contacts for each partner; this is a good moment to make sure that each partner has buy-in from their own team and senior management for involvement in the project.
- **Values:** any specific values you've decided will underpin your project.

Project details

This breaks down some of the key information about the project. You'll need:

- **Project mission:** this can be taken from your Impact Map
- **Project timeline:** you can use the Project Planning Grid here

Roles and responsibilities

This makes crystal clear what each partner is responsible for, as well as outlining your shared responsibilities as partners. We have broken this section down into:

- **Project responsibilities:** you can use the Resource Map here
- **Financial responsibilities:** this will depend on where the funding for the project is coming from and how it is being spent, and may require further engagement between other members of your team if those working on the project are not involved with finances of their organisation.

Marketing and communications

This section gives you a chance to agree on how you talk about the project publicly, including how to reference each partner when promoting the work.

Cancellation or termination

In the unfortunate event that the project cannot proceed, it's important to be clear from the outset what happens next - particularly if money has been secured or spent. It is important that those with financial responsibility within each organisation are content with the wording of this section.

Partnership Agreement

Statement of Intent

Purpose: the purpose of this Partnership Agreement ('Agreement') is:

- to outline the key details of the partnership project Project Title ('Project')
- to clarify the roles and responsibilities of each partner organisation ('Partner')
- to provide a route for resolution if the project does not go to plan

Timeframe: this agreement covers the period of _____ to _____

Partners: the partners involved in the project are as follows:

Organisation Name:

Organisation Address:

Registered Company / Charity Number:

Main Contact Name / Email Address / Contact Number:

Secondary Contact Name / Email Address / Contact Number:

Organisation Name:

Organisation Address:

Registered Company / Charity Number:

Main Contact Name / Email Address / Contact Number:

Secondary Contact Name / Email Address / Contact Number:

Organisation Name:

Organisation Address:

Registered Company / Charity Number:

Main Contact Name / Email Address / Contact Number:

Secondary Contact Name / Email Address / Contact Number:

Values: This agreement relates to a partnership project. As such partners agree to approach the project in a spirit of collaboration, embodying the following values: good communication, shared vision, embracing differences, sticking to commitments and working compassionately. Partners agree to support each other and contribute their specific expertise where necessary.

Project Details

Project Mission:

[One paragraph project description]

Project Timeline:

[Include key dates and milestones including agreement of vision and aims, midpoint review of partnership and debrief and evaluation conversation at end of project]

Date	Description of Milestone

Roles and Responsibilities

Project Responsibilities: Each partner's specific responsibilities include but are not limited to:
[Include key deliverables for project for each partner e.g. workshop delivery, event delivery, evaluation]

Partner:

Partner:

Partner:

All partners' collective responsibilities include but are not limited to:

Financial Responsibilities: All partners commit to adhering to the income and expenditure as set out in the partnership project budget, including an appropriate allocation of funding to each partner organisation involved. Each partner agrees to cover the following costs:

Partner:

Partner:

Partner:

Each partner takes responsibility for their own organisational running costs in relation to the project, including staff costs and insurance. Any additional project expenditure outside the agreed budget must be agreed by all partners before any expenditure is incurred.

Liaison: Partners agree to liaise with each other regularly in relation to the project and to consult each other on any significant decisions relating to the project. No significant decisions will be taken that materially affect the scope of the project without consultation with all partners.

Marketing and communications

Partners agree to obtain consent from all other partners before sharing details about the project, including via print media, social media, websites, newsletters, press releases or advertisements. When sharing details about the project, partners agree to use as a minimum the following information:

Project title:

Partner organisation names:

Funders name(s):

Relevant partner and funder logos and other marketing material will be made available for all partners to use for the duration of the project. Partners agree to obtain the necessary rights and licences to share their marketing material, and to ensure any such material is only used in relation to this project.

Cancellation or termination

If the project is cancelled or a partner is unable to fulfil their responsibilities for reasons outside of their control (referred to as force majeure), the partners will aim to reschedule the project for a mutually convenient time or deliver the project in an alternative way.

If a partner does not fulfil their responsibilities outlined in this agreement, partners must first work together to try to resolve any issues. If after one month a suitable resolution cannot be found or a partner continues to breach this agreement, any partner may decide to withdraw from the project or all partners may agree to terminate this agreement. In this situation, any outstanding payments must be made to other partners or suppliers.

Partners agree to keep funders informed of any issues that affect the delivery of the project, in particular plans to reschedule, redesign or cancel the project.

Declaration

By signing here, all partners agree to the above Agreement. Signatories confirm they have the relevant authority to sign on behalf of their organisation.

Partner organisation name:	
Signatory name & title:	
Digital signature:	
Date:	

Partner organisation name:	
Signatory name & title:	
Digital signature:	
Date:	

Partner organisation name:	
Signatory name & title:	
Digital signature:	
Date:	

Partnership Health Check

Your partnership journey is now well underway. It's worth checking in with your partners on a regular basis to make sure you're all feeling good about the direction of travel.

The **Partnership Health Check** helps you know whether the collaboration is working well for everyone involved. It can be used as a framework to structure your discussion, allowing space for challenges or concerns to be voiced and discussed. Make sure you have your **Impact Map** and **Partnership Agreement** to hand to refer back to.

“It was so important to take time to think about expectations, understanding of ideas and different ways of working and cultures... The support package gave us foundational skills to use for large-scale future partnership projects.”

Nottingham Children, Young People and Families Project
Take Note partner organisation



Shared Vision

We have an agreed vision to which all partners feel they can rally

The partnership sets concrete, attainable goals and objectives

The partnership project goals are aligned with each organisation's own goals

Not yet evident
We haven't started this

Emerging
Making good progress but there's still more to do

Established
We feel confident that we are doing this well

Excelling
We're nailing this

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Communication is Key

There is open and frequent communication amongst partners

All partners do their best to honour the agreed project milestones and check-in points

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Culture of Learning

Partners all feel like their own work is being strengthened by learning from other partners

We are starting from a point of mutual respect

Partners feel confident in each other's ability to deliver

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Embrace Difference

We have a culture in which differences of opinion can be shared and explored constructively

All partners are willing to find compromise and balance the group's needs

There is a culture of openness and encouragement to acknowledge challenges and find solutions

Not yet evident

Emerging

Established

Excelling



Follow Through

Each partner has defined roles and responsibilities which are clearly laid out and respected

There are multiple layers of decision-making to keep the partnership moving



Support and Celebrate

If one partner is struggling to fulfil their responsibilities, we have a culture of support in which this can be shared and problem-solved

There is a positive culture of celebrating success

The partnership is fun!

Looking Back



This process set the basis for our activity report, and allowed group reflection in a neutral context. We will surely suggest keeping a similar set up for what concerns collaborative project wrap up in future partnerships.

Fuel Theatre, Take Note partner organisation

Your project and work together is drawing to a close. Naturally your first question might be: where do we go from here?

Moving on from a partnership project or taking it forward into a new phase can be complex. This stage needs careful thought and well-managed conversations between partners.

Before you talk about what's next, it's important to take some time to think about the project you've just completed.

Impact

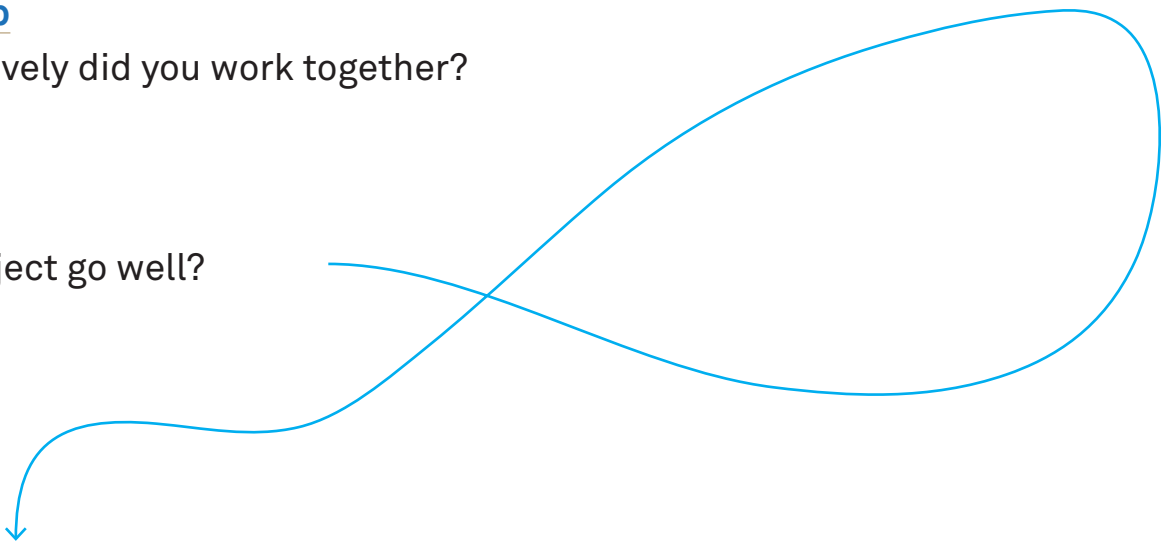
Did the project make a change for the community?

Partnership

How effectively did you work together?

Project

Did the project go well?



Impact

Let's start by thinking about the changes for your community that your project delivered.

Using your original **Impact Map**, along with any **Impact Evaluation** or data you have collected so far, spend some time as a group reflecting on whether the project achieved what it set out to do:

- Did we achieve the outcomes we set out to achieve?
- Were there any unexpected outcomes to the project?
- Did the participants experience the work in the way we expected?
- Did our outcomes contribute to the impact we expected?

If you have received funding for this work, the funder may have specific reporting requirements in relation to the impact of this project. It might be helpful to refer to your funding application and the funder's guidelines during your reflection time in this Huddle.

Partnership

Next, reflect back on your work together as a group. Think back to the partnership values that underpinned the project and ask yourselves:



We are good communicators – Was there good communication between partners during the project? Were our interactions as partners inclusive, open and transparent? Did we create opportunities for all voices to be heard?



We share a vision – Did the mission for our project support our collective vision? Were the shared outcomes for this project broadly met? Did the outcomes align with the activities we delivered?



We are humans! - Do we feel passionate about this project and any future potential work together?



We stick to our commitments – Did we stick to the roles outlined in the Partnership Agreement? Were we realistic about our capacity as a group / as individuals / as organisations, and has anything changed since we began working together?



We embrace differences - Did we handle any differences of opinion well during the project? Were we able to incorporate different people's perspectives and ideas?

Project

Did the project delivery go well?

Before you wrap up, it's worth thinking about the nuts and bolts of the project. One way to approach this is to take each of the key elements of the project (e.g. planning, participant recruitment, marketing, event delivery) and discuss:

- What went well? Think about all the positives
- Even better if? Think what we might do differently next time

Think specifically about how you worked **together**. You could use your **Resource Map** and **Project Planning Grid** to remind you what you'd agreed at the beginning.

What Next?

Moving Up?

Or Moving On?

There are two ways you could take things forward after looking back over your partnership project.

Moving Up

You've decided there is enough momentum to explore how your partnership might develop and continue.

Moving On

You've decided this isn't the right time to develop a new project together.

Moving Up



Use these questions to help shape your conversations about where you go next:

How has the idea evolved?

- **Has the challenge in the community changed** since we started our project?
- How does any future work **directly relate to the changing needs** of our community?
- **Has the community been consulted** / how can we consult the community?
- How could we develop the project to **build on the outcomes** we've achieved this time?
- What are the **most important elements of this project** and how can they be maintained / amplified?
- **What more do we need to know** to inform our thinking?

How might the partnership evolve?

- Are there any **new or additional partners** we might want to involve next time round?
- How will we **take this conversation further**? Who else may need to be consulted or involved?

Are we committed and able to keep going?

- Are we prepared to **commit what we need** to this project and support our partners?
- Do we have the **financial and human resources** to take part?
- Do we have **buy-in from management** and the wider team?

The nuts and bolts

- **What will we do?** What are we delivering and what form will the project take?
- **Is everyone available?** Decide on the start and end dates and figure out if each partner has capacity to take this on. What other commitments do partners have in the diary?
- **Who is responsible?** Make sure everyone knows who the key contacts are for each partner as well as colleagues or managers who know about the work.
- **Who is paying for this?** Discuss what funding we can commit to the project and what additional funding we might need to secure before we can proceed.
- **What are we in charge of?** Clarify the key responsibilities for each partner.
- **What are the risks?** Think about the challenges we might face bringing the project together and what we could do to mitigate these risks.
- **What difference will it make?** Start to think about the outcomes for the project and how we will measure success.
- **What happens afterwards?** What do we want the legacy of our project to be?

Don't forget to revisit the early stages and tools of the Collaboration Journey as your continued work together takes shape.

It's also worth refreshing your **Impact Map** and updating your **Partnership Agreement** to reflect these conversations before pressing go on your next round of activity.

Good luck and happy collaborating!

Moving On



It is natural for projects and partnerships to come to an end, and this can happen for a whole range of reasons – funding, capacity, change of circumstances within organisations and the community you're working with.

If you've decided to draw your partnership to a close, use your final bit of time together to think about ways you can capitalise on what you've achieved collectively:

- **Share your impact:** think about ways in which you can share your findings from the project and who might be most interested in these.
- **Share your reflections on partnership working:** your experience of collaborating on a project will be of benefit to others considering embarking on a partnership journey. Think about writing up your reflections and sharing them publicly with others in your sector.
- **Sustain your outcomes:** are there ways to continue the impact of your work in the community without the ongoing delivery of core activity?

The Huddles

Huddles are opportunities for all partners to come together at key moments throughout the Collaboration Journey.

In a partnership project, it can be hard to find the time to meet up (whether in person or online) and have an open dialogue about the project and about the collaboration itself. The Huddles help to ensure that time is created and structured to facilitate project planning and to discuss the partnership itself. They focus on agreeing ways of working together, co-designing and planning the project and creating a safe and supportive space in which to reflect on any challenges or issues arising.

For more detailed information about the Huddles along with suggested agendas, tools to use for each and tips for Huddle facilitation, please take a look at the [Take Note Huddles tool](#).



The Huddles gave us a chance to step away from the project delivery and look at the partnership. The Huddles offered moments where we had permission to come together, breathe and think things out. I think it did enhance the partnership, it enabled us to connect and appreciate each other's input more [...] it helped us to achieve our outcomes better.

Gloucester Cathedral, Take Note partner organisation



Find out more

[The Collaboration Guidebook](#)

The full free guidebook from Take Note, designed as a step-by-step guide for individual innovators, social change organisations and community projects to devise, plan, deliver and evaluate a successful collaborative project.

[Collective Impact Lab](#)

More in-depth insight into the work that sits behind these tools - Take Note's action research projects through which we support and evaluate partnership innovation and collaborative best practice.

[Partnership Portfolio](#)

Discover more about the partners we work with. Take Note partners with organisations, networks, funders and social change initiatives to share and disseminate our methodology and tools, with the aim of embedding a culture of collaborative best practice more widely across the sector.

Take Note is generously supported by Footwork and Esmée Fairbairn Foundation.

With thanks to our collaborative trailblazers: Amnesty International | Barton Street Neighbourhood Policing Team | Bed-Stuy Veterans | Community Action Suffolk | First Light Festival | Friendship Cafe Gloucester | Fuel Theatre | GARAS (Gloucestershire Action for Refugees and Asylum Seekers) | Gloucester Cathedral | Gloucestershire Carers Hub | Gloucester Culture Trust | Gloucestershire Hospitals NHS Foundation Trust | GUST | Inclusion Gloucestershire | Kirkley Pantry | Look Again Photography | Metropolitan Arts Centre (MAC) Belfast | Nottingham CAMHS Mental Health Support Team | Nottingham Children, Young People and Families Project | Prospects Youth Support Team | Suffolk Artlink | The Music Works | The Venture Gloucester | Trelya | We The Conspirators | Your Next Move



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