

The Collaboration Guidebook





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The photographs used throughout this guidebook celebrate the work of Kirkley Creates, an innovative, cross-sector partnership project supported by Take Note and funded by Footwork Trust. The project brought together four Suffolk-based organisations: Suffolk Artlink, Community Action Suffolk, First Light Festival and the Kirkley Pantry. Using Take Note's tools, resources and strategic input to support their partnership, the four organisations collaborated to create a dynamic, high impact participatory project involving foraging, dance and art, connecting people across the Lowestoft and Kirkley community. We are hugely grateful to Kirkley Creates for their active engagement with Take Note and their invaluable input and feedback on the early version of our tools, which have informed so much of what is included in this Guidebook. Photo credits: Nick Illott

Why collaborate?

The world is facing multiple, profound challenges - inequality, discrimination, a mental health crisis, a climate crisis. When many minds come together, joined up solutions to these challenges - from grassroots projects to global initiatives - have the potential to transform our collective power to make change.

Collaboration enables partners to diversify their reach and amplify their ambition. The process of working with others shares and democratises knowledge and expertise. It builds strong foundations for real, long-lasting impact within communities and beyond.

What is this guidebook?

This guidebook is designed as a route map and travel companion along your collaboration journey. Although we talk about organisations and teams, this guidebook can be used by individual innovators, community projects or brand new initiatives. Each tool provides a structure to support you from the spark of a new idea to delivery and evaluating your work together, whether you have worked in partnership many times before, or this is the first time you are working with others.

Why is this guidebook needed?

Collaboration sounds easy but 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. But this guidebook is here to help!

Who created this guidebook?

This guidebook has been created by **Take Note**, a sector support initiative that advocates for collaborative best practice, sparking and supporting extraordinary collaborations between unlikely allies working in communities.

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 through sharing tools, ideas and learning. This guidebook has evolved from this period of action research and has been co-created with community-based partners every step of the way.

The brains behind Take Note are social entrepreneurs Marianna Hay, Emily Webb and Stuart Burns. Between us we have twenty years of experience leading small arts organisations and delivering cross sector collaborative arts for social impact projects. Take Note is born from our first hand experience of the extraordinary impact and artistic possibility of collaboration as well as the real and significant challenges that arise when working with others. And our experimental approach, backed up by extensive research and sector consultation, is all about innovating to find the best ways to tackle these challenges collectively.

The initial three years of Take Note's work has been funded by the **Esmée Fairbairn Foundation** and **Footwork Trust** as part of their shared interest in strengthening community partnership working.

What makes a successful partnership?

Through our action research, we have found that successful partnerships share the following three principles:



Clarify the 'why'

Partners articulate the shared vision for the project and what they want it collectively to achieve. They consider how this feeds into each partner's wider organisational objectives.



Take time to set it up

Partners create space at the beginning of the project to build strong foundations for the partnership, including plotting out each partner's roles and responsibilities and addressing from the start any potentially challenging power dynamics.



Give the partnership as much love as the project

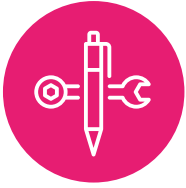
Partners spend time talking about how they want to approach their work together and what they consider to be their shared values. They create space to keep checking in on the health of the partnership throughout the project.

How to use this guidebook

There is no ‘right way’ to use this guidebook. Depending on your experience working in partnership and each partner’s available capacity, you may only need to dip in and out, or you may decide to use the entire guidebook to shape your collaboration journey. The guidebook features **Tools** to help you work through various questions as a group, **Huddles** to help shape your collective discussions and **Values** that Take Note believes underpin successful partnership working. You’ll notice we use the word journey in relation to collaboration, but we do so advisedly because delivering collaborative work is a process.

Take Note proposes thinking about your collaboration in five stages. The **Collaboration Journey** outlines what is involved at each stage:





Tools

The tools provided at each stage are designed to help you shape discussions between partners, set and monitor your objectives, assess how well the partnership is working and define roles and responsibilities of each partner. Some are more interactive than others, but each tool is intended to act as a neutral facilitator to help you work through some of the challenges around partnership working. Each tool in this guidebook helps you to develop a clearer structure for your work together and a strategy for how to move forward as a group.



Huddles

What are Huddles? Communication comes in many forms, but you can't beat just speaking to each other! Take Note recommends coming together as a group in a 'Huddle', in person or online, at least four times during your collaboration journey.

Why bother? You've all agreed you want to collaborate to make change. Coming together to check in on your partnership and how the project is going will help you ensure you achieve your intended outcomes, keep communications open and build strong relationships now and for future projects.

How to approach a Huddle? Each of the Huddles gives you a moment away from project delivery to make sure that you're all heading in the same direction, working together to find solutions to any problems that you're facing. You'll find that some of the tools suggest some light-touch preparation that partners can do before each Huddle so you're ready for your discussions.



Values

All partnerships are different, but our research so far suggests five values underpin all good collaborations. These values have been shaped with Take Note's partners across the UK and beyond. Sharing partnership values together at the start of your collaboration and using them as a guide if challenges arise should help achieve a more open, equitable partnership.

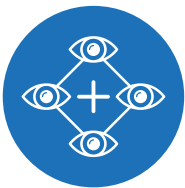


We are good communicators

Agree how and how often you'll be in touch

Give open and honest feedback

Make sure everyone knows who to contact and where to find information



We share a vision

Remember we're all working towards the same goal

Check back regularly with your initial outcomes

Remind yourself why you are doing this project during tricky moments



We are humans!

Celebrate when things go well

Be compassionate when things don't go to plan

Be flexible when priorities change



We stick to our commitments

Be realistic about what you offer to do

Follow through on your commitments

Shout if you can't do what you agreed to do



We embrace differences

Be open to learning and engaging with new ways of doing things

Acknowledge any conflicting opinions and address them constructively

Create space to discover unexpected solutions and innovations

Let's get started

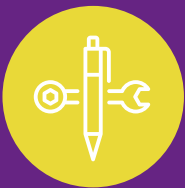
1 Take the First Step

We want to make change together

When? You're at the very start of your journey and have the spark of a new idea!

What? This stage is about working out what you want to do and who you want to do it with to achieve the impact you're hoping for.

How? Use the following tools within your own organisation first, then discuss with each of your prospective partners.



Tools

What is our project and who might we want to work with?

→ Preparing for your Partnership Journey

How does the project help us achieve our organisational goals?

→ Setting your Organisation's Partnership Objectives

→ **By the end of this stage** you have discussed your project idea with all of your prospective partners and are ready to bring everyone together to start planning the project.

Preparing for your Partnership Journey



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?

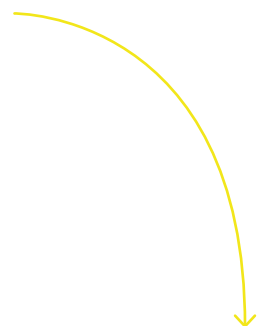
What change do you hope to see in your community?

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?



Setting your Organisation's Partnership Objectives

At the start of your collaboration journey, it's worth taking a moment to think about your own organisation and what you want to achieve with this partnership. This is separate from the work you and your partners will do when thinking about your project's impact on your community

This will help you keep the project aligned with your own organisational goals, be a useful way to check you're on track, and help all partners and stakeholders understand why each organisation is taking part in the project.

With your own organisation

Step 1

Make a list of what this collaboration helps you achieve as an organisation - these are your organisation's Partnership Project Objectives.

For example: builds our experience of working with a new demographic (e.g. young people) and strengthens our understanding of how to support and deliver activity in out-of-school contexts.

Step 2

Depending on how many objectives you come up with, it might be helpful to arrange them into short / medium / long term.

You can come back to these objectives through the project and at the end to keep you on track and consider how the project has had an impact in these areas.



With each prospective partner

Step 3

Partners come together and compare notes:

- See if there are natural overlaps in your individual organisation objectives for the project.
 - Or if there are any objectives that are competing in some way or might cause a conflict, use this opportunity to address them.
-

Step 4

If it's helpful, you could also develop an overarching set of objectives for the organisations within the partnership as a whole.

For example:

- Greater efficiencies in developing network and profile growth
- Complement and extend respective skill sets and areas of expertise
- Amplify and scale our collective impact

Don't forget: these objectives relate to each partner's organisation. You'll work together later on to create an Impact Map to establish your project's outcomes.



Before your first Huddle

Before you agree to the partnership, it's important that you discuss the key logistics with each potential partner to make sure they're ready to come on board. You'll refine these answers in more detail at your first Huddle as you design your Impact Map together.

Here's a checklist for you to use in your introductory discussions with each partner. At the end of each conversation, agree your next steps - including confirming who the key contact will be and finding a date for the first Huddle with all project partners.

What do they think of the idea?

Outline your project, including the rough ideas for activities, timeframe, aims and any other partners you plan to involve.

How does it connect to their wider aims and objectives?

How does this project contribute to their organisation's impact more generally, and what will this partnership achieve in terms of organisational development? Consider using the **Setting your Organisation's Partnership Objectives** tool here.

What could they bring to the project?

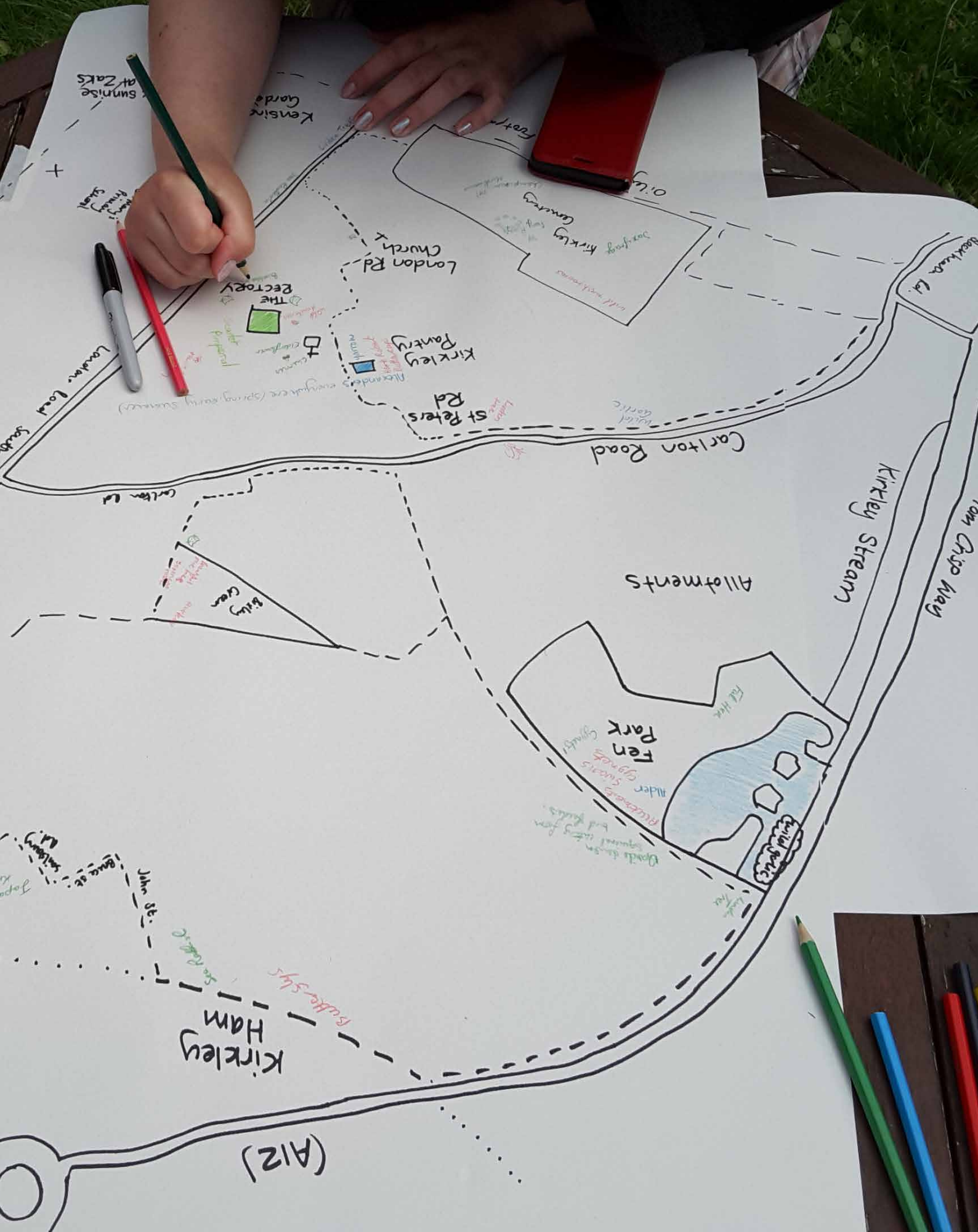
Talk through your reasons for wanting to work together and what **you** think the partner can bring to the project. Ask them what **they** think they can contribute.

How will the project be funded?

Discuss the outline budget for the work and where the money might come from.

Does the timeframe work for them?

Find out whether your partner has other commitments during the proposed timeframe of the project.





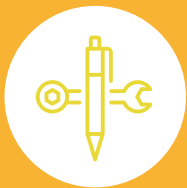
2 Take Time Together

We're ready to make a plan

When? All the partners are now on board.

What? This stage is all about setting up the partnership in a way that clarifies your shared vision and working out how to get the funding to make it happen.

How? Hold your first Huddle together as a group to answer the following questions:



Tools

What do we want to achieve together?

→ Collaborative Impact Map

Are there any potential power dynamics among the partners that should be addressed?

→ Approaching Power Dynamics

How will we raise the money together?

→ Tips & Tricks for Collaborative Fundraising

→ By the end of this stage you've brought your group together for the first time, applied for and secured funding and you're ready to finalise the details of the project.

Introducing the Impact Map



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.

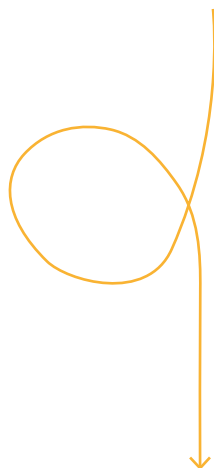
Why bother?

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>



We share a vision: Are we on the same page?

Creating your Impact Map together is an important moment to make sure you're all working towards the same goal. You'll refer back to this Impact Map a lot during your project, and it should help avoid your project veering off track later on.

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.

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Step 2 [Develop your how](#)

Step 3 [Complete your Impact Map](#)



Collaborative Values

We embrace differences

As you map out your journey, approach this session in the spirit of openness to new ideas. Remember that different opinions can often lead to unexpected and innovative solutions!

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>
<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>			

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.



Tips & Tricks for Collaborative Fundraising

Not even the best collaborations and partnership projects can happen without the required funding!

The majority of application processes for traditional funding sources (public funding, trusts and foundations) are designed without much opportunity for collaborative input from applicants. (At Take Note we're working hard behind the scenes to try and change that.)

In the meantime, here are some tips to make the process of applying for funding as collaborative as possible - avoiding the situation where one partner takes on the whole fundraising burden.

Before you start: a note on budgeting

As you start to bring the details of your project together, you'll need to create a shared project budget. You can choose a format that works for you, but as a group you should agree on the following expenditure and income lines for your budget:

- Project expenditure: what you're spending to deliver and promote your activities
- Staff costs: for staff specifically working on the project
- Overheads: you might want to include a contribution to wider organisational costs
- Funding already secured: what each partner has already committed / which funders are already supporting the project
- Funding to be secured: what money you still need to find and how partners will split this
- In-kind support: what are you getting for free, including venues, materials or staff time

Income and expenditure does not need to be split equally between the group, but you may need to explain to funders if there are significant differences between partners.

How to approach fundraising together

Pool your networks

- Map out together a range of funders who might be a good fit for this project or with whom partners in the group have a connection.
- Check that an application to a specific funder won't compromise or undermine a separate application that partner in the group might also be making.

Support the application process

- Work together to create an Impact Map for your project before you start work on the application. Doing this as a group to clarify your collective Activities and Outcomes for the project (all of which the funder is going to need to know anyway) will significantly strengthen your application and increase its chance of success.
- Inevitably, one partner may end up pulling together the majority of the application. Share the load by reviewing drafts and responding to questions and requests for specific input in a timely fashion.
- Familiarise yourself with any specific guidelines set by the funder to ensure that comments you make on the application drafts respond closely to what the funder is looking for.
- Be aware across the group of funding deadlines and build in enough time for everyone to review and reflect back on the application before final sign-off.

It can be helpful for each partner to provide evidence of their commitment to the project through supplying written quotes about why they want to take part and what the impact will be. This helps give a sense of the multiple people behind the project and stops it from feeling like it is being driven by one partner.

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Chenopodium

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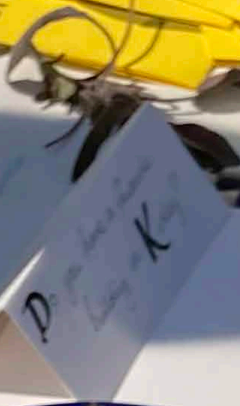
Alder

Nasturtium

Marigold

Oak Gall

Beetroot



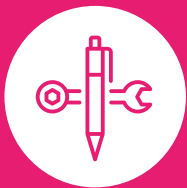
3 Take Action

We're doing it!

When? You have secured funding for the project but delivery has not yet started.

What? This stage is all about fine tuning your partnership, agreeing who is doing what and refining how each partner works.

How? Hold your second Huddle to answer the following questions:



Tools

What values underpin this collaboration?

→ Refining Collaborative Values

How should we allocate resources?

→ Collaborative Project Planning

How will we measure the project's impact?

→ Collaborative Evaluation Planning

What are our roles and responsibilities?

→ Partnership Agreement

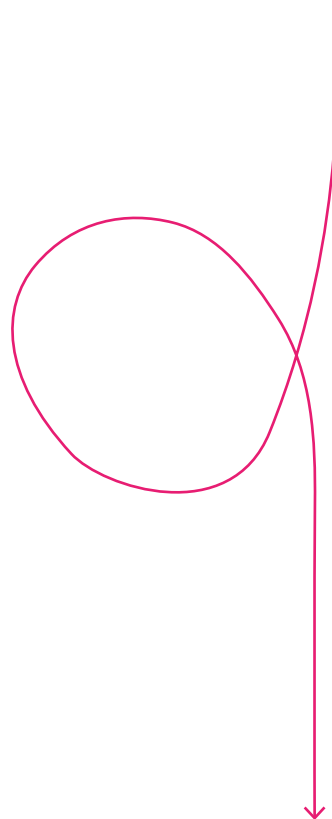
→ **By the end of this stage** your partnership agreement has been signed and you're ready to start delivery.

Refining Collaborative Values



Developing a set of shared partnership values together is an ongoing process throughout your project, however It's a good idea to refine your values once funding is in place. Once agreed, use them as a guide to refer back to should challenges arise. This will help to achieve a more open, equitable and successful partnership.

The following set of questions has been designed to explore the five key values that are fundamental to any collaboration and the practical ways to honour these throughout your work together.



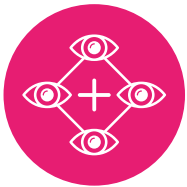


We are good communicators

How often will you be in touch?

What modes of communication will you use?

How are you sharing information about who to contact and when?



We share a vision

Who in the wider team needs to see the intended outcomes for the project?

Are there ways you can share real time feedback from participants to keep everyone connected and committed to the work?



We are humans!

Can you carve out time as a group to celebrate your successes and share any challenges?

How can you respond to and support different needs and priorities across the group?



We stick to our commitments

How can you ensure each partner understands their individual roles and responsibilities across the project and commits to delivering these?

What contingencies are in place if a partner can't follow through on what they agreed to do?



We embrace differences

How can you find space for shared learning that maximises the range of ideas and approaches that each partner brings?

How will you create a culture where people feel able to give open and honest feedback and where conflicting opinions can be addressed constructively?

Collaborative Project Planning

As you set off on your collaboration journey together, take some time to understand what resources you have at your collective disposal, and how you're going to pace yourself over the project.

These project planning tools help to:

- Ensure key tasks are being progressed
- Clarify who needs to be involved in each part of the project
- Identify any skills or resource gaps, or extra skills or resources in the group still to be used

Why bother? Going through this process helps to make sure you've all agreed on the plan and gives you a framework for delivery.

Tool 1

Resource Map

Here's what a very simple completed Resource Map might look like:

Task	Partner 1	Partner 2	Partner 3
Participant recruitment	Lead	Contribute	Not involved
Event planning	Lead	Not involved	Contribute
Marketing	Contribute	Lead	Not involved
Evaluation	Contribute	Contribute	Lead

Lead

We are in charge of driving this part of the project

Contribute

We are in touch with those delivering this part of the project and give our input as needed

Not involved

We are responsible for other parts of the project

Once you've completed your initial Resource Map, it's worth discussing the following questions:

- Do we have the skills and resources in the group to deliver these tasks? If not, where might we go for help?
- Are there other skills and resources in the group that are not being used here? Where might these be used?



Collaborative Values

**We stick to our commitments:
Who's doing what here?**

Be realistic about what you offer to do and follow through on what you commit to. If anything changes, talk with your partners if you can't do what you agreed to.

Tool 2

Project Planning Grid

Your Resource Map can then be transformed into a Project Planning Grid (or Gantt Chart). This will help you pace your journey together and plan out the project in more detail. You can also use it through the project to check:

- What is on track
- What has been delayed
- Where extra resource is needed
- Where the crunch points are in the delivery plan

Here's what a simple completed Project Planning Grid might look like:

Task	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Participant recruitment	Start		Complete			
Event planning	Start			Complete	Deliver event	
Marketing			Write marketing plan	Start	Complete	
Evaluation	Plan framework				Start	Complete

→ (Of course you can add in more detail and make this as specific as you find useful.)

Collaborative Evaluation

Why evaluate together?

- We want to know what impact our project has had on our participants
- We want to find out what worked well, and what could be improved
- We want to understand the impact of the partnership on our organisations
- We have been asked to report back on how our funding has been used

Not sure where to start? The process outlined below will help you figure out **what** it is you want to find out and **how** you might do it.

Impact Evaluation

Step 1:

What impact do you want to have?

Start by referring back to your Outcomes and Experiences in your Impact Map. These are the changes you hope to see by delivering your project and how you want the project to be experienced by participants.

Step 2:

What matters most?

There might be a number of different outcomes you hope your project will achieve and that you originally included on your Impact Map. It's possible that you won't be able to measure all of these. So it's worth going through a process of prioritisation:

- Which are the most important outcomes for you as a group?
What do you care about the most?
- Which outcomes relate most closely to enabling your ultimate mission and vision?

Step 3:

What do you need to know / agree as a group?

- Who is this evaluation ultimately for?
- In what format do the findings need to be presented / shared?
- Are there specific or additional outcomes you need to measure that a funder has requested?
- Are there any specific or additional outcomes that individual organisations within the partnership group want to explore?



Collaborative Values

“We embrace differences”: What happens if you can't agree?

When prioritising your outcomes, you may find that different partners have differing priorities. Make time in the process to discuss where you can find common ground. There may be some outcomes that sit outside of your collaboration - you can decide if you want to capture these or only the ones that all partners want to know.

Step 4:

What tools and techniques will you use?

You can evaluate impact using a wide range of methods and tools, so it's up to you as a group to work out what's right for your project. Think about:

- **What methods** for evaluating these experiences and outcomes might work best here?
 - Think about how often you might interact with your participants or what they might respond to best.
 - Are there creative ways for you to integrate this evaluation into your project? Evaluation does not always need to involve a questionnaire!
- **When should you evaluate** the experiences and outcomes?
 - You might want to evaluate at the start and end, or at various points during the project, or at a later date after the end of the project.
- **Collecting data** on project participants and monitoring attendance can be extremely useful and give you important information about the reach / scale / engagement of your project. It's worth noting, however, that this kind of monitoring is not the same as measuring impact or outcomes for participants.

Step 5:

Who should do the evaluation?

Evaluation should be a team effort, but some partners may have more experience in designing and delivering evaluations or closer contact with participants. Discuss with your partners who is best placed to:

- design the evaluation methods
- carry out the evaluation
- record the findings
- analyse the findings

Consider the practicalities of your evaluation, in particular the **timeline** and whether your team has the necessary **capacity** to deliver the evaluation alongside the project.

Step 6:

Sharing your impact

Understanding the impact of your project may be of interest not only to you, but your participants, funders and other organisations. Think about ways you might want to share key information about your project, including whether you want to produce an **Impact Report** to bring your impact evaluation together.



Partnership Agreement

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.

The next page outlines the key information you'll need to prepare your partnership agreement. Once you're ready, 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.



4 Take Time to Check In

How are we getting on?

When? You are about halfway through delivering your project.

What? This stage is all about keeping your collaboration on track and making space to share success and raise challenges.

How? Hold your third Huddle to answer the following questions:



Tools

How is the partnership going?

→ Partnership Health Check

How is the project progressing?

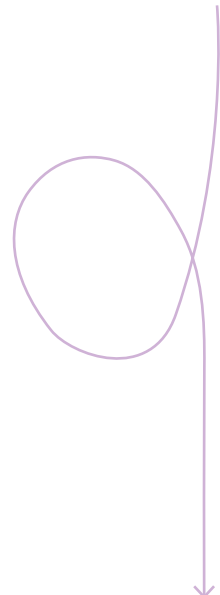
→ Project Health Check

→ **By the end of this stage** you're ready and on track to complete the final stages of your project.

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. You'll notice the questions in this Health Check tool follow the same structure as those in the Refining Collaborative Values tool: they can likewise 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.





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

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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

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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

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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!

Project Health Check

Take time together as a group to check that your project is on track, that the original plans remain relevant or have evolved appropriately and that individual organisations remain able to deliver their specific roles and responsibilities.

If it's helpful, you can use the information in your **Resource Map**, **Project Planning Grid** and **Partnership Agreement** to help you structure this check in.



1. Resource Map

- Are individual partners on track to deliver their roles and responsibilities?
- Do any changes need to be made to this resource map? Have there been changes to personnel / capacity / context for each partner that will impact what they are able to contribute?



2. Project Planning Grid

- Are our tasks on track or are any delayed?
- Will specific tasks need additional resources or support?
- Look ahead to any upcoming crunch points: have we built in enough shared capacity and support for these moments?



3. Partnership Agreement

- Cross check any reflections on the resource map and project planning grid against the partnership agreement.
- If there are outstanding concerns about any partner's commitment or delivery, it can be useful to work through the partnership agreement and raise issues that arise from it. This can provide an objective structure and framework for potentially challenging conversations.



5 Take the Next Step

How can we build on this?

When? You are nearing the end of your project and have finished delivering the project's activities.

What? This stage is all about bringing the project to an end and reflecting on the work you've done together.

How? Hold your final Huddle to answer the following questions:



Tools

What did we achieve?

→ Looking Back

What comes next?

→ What Next?

→ **By the end of this stage** you have a plan in place for what happens next and how you want to move forward as a group.

Looking Back



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

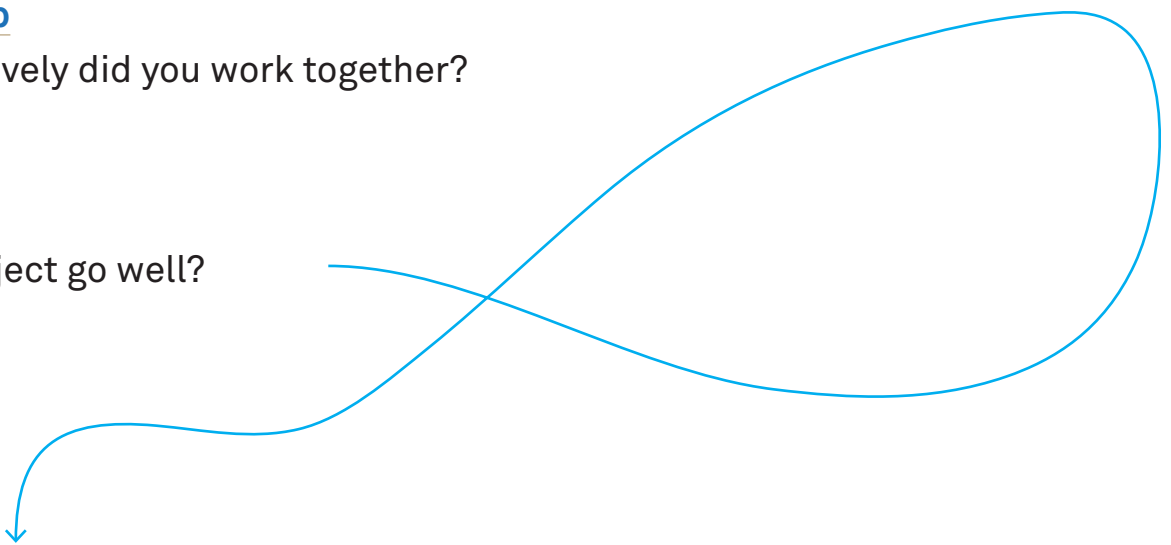
Did the project make a change for the community?

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?

Solving the world's biggest problems takes ensembles, not soloists.

- Jeffrey Walker, United Nations

Take Note's Collaboration Guidebook is kindly supported by Footwork Trust and Esmée Fairbairn Foundation's Grants Plus programme. It has been informed and co-created through projects in partnership with:

Academy for Impact through Music | Amnesty International | Barton Street Neighbourhood Policing Team | Bed-Stuy Veterans | Child and Adolescent Mental Health Services Nottingham | Community Action Suffolk | First Light Festival | Friendship Cafe Gloucester | Fuel | GARAS (Gloucestershire Action for Refugees and Asylum Seekers) | Gloucester Cathedral | Gloucestershire Carers Hub | Gloucestershire Hospitals NHS Foundation Trust | GUST | Inclusion Gloucestershire | Kirkley Pantry | Look Again Photography | The Mac Belfast | The Music Works | New Philanthropy Capital | Prospects Youth Support Team | Suffolk Artlink | Trelya | The Venture Gloucester | We The Conspirators | Your Next Move

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