



Partnership Building Toolkit and Checklist

This toolkit contains a checklist that provides steps, tips, and helpful resources for building successful partnerships to advance digital inclusion in your community. The checklist outlines action items to help you implement the partnership strategies highlighted in the ConnectHomeUSA Playbook. This toolkit also includes templates that can be downloaded and edited to include steps that are specific to your community and program.

The Checklist below can be used in conjunction with the following complementary documents in this toolkit:

- **Stakeholder Mapping Template**
- **Partner Inventory Worksheet**
- **MOU Template**
- **Partner Communication Strategy Guide**

STEP 1: Define the Needs

Identify needs. The first step in building successful partnerships is identifying the needs of your community that the partnering organizations can address or are already addressing. Clearly defining the needs (**check out the Fundraising Toolkit for a sample needs assessment**) allows you and your partners to have a common understanding of the specific objectives that the organizations will collaboratively work toward. The four-legged table of digital inclusion is a useful framework for defining community needs and partnership objectives.

Four-Legged Table of Community Inclusion:

- Connectivity
- Devices
- Digital Literacy
- Quality-of-Life Partnership



Tip: You can use the *Partner Inventory Worksheet* (also referenced in Step 5) to identify partners that you already have in place and gaps that need to be filled.

Remember to obtain resident feedback and buy-in. This is a critical step in establishing your program. By designing a program that is responsive to resident needs and interests, you are building trust which in turn will encourage resident participation in your programs. Use baseline and other surveys you may be administering as well as other resources highlighted in the ConnectHomeUSA Playbook to identify the specific needs of the community and begin to evaluate which needs will require collaboration with external entities.

Evolving needs: While identifying the needs to be filled is the first step, it is important to note that this will be an iterative process. As existing and new partners are engaged in planning sessions, new needs as well as new resources may come to light. CHUSA leads should ensure that needs are clearly defined, but also remain open to periodically revisiting the identified needs and updating them as new information and perspectives are shared by partners and residents.

STEP 2: Engage Existing Stakeholders and Partners

Get input from partners. After initial needs are identified, the next step is to engage with existing partners and stakeholders for input. The perspectives of these partners can help to shape the defined needs of the community and the goals of the program as they are continuously refined. This can begin prior to, or as part of, your convening. (See **ConnectHomeUSA Playbook Chapter 4 and the Convening Planning Toolkit.**)

Engage existing partners early. Early engagement of partners is important for successful collaboration and program design. Early engagement also promotes a sense of co-ownership and including diverse perspectives can help to ensure that important issues are not missed. Additionally, existing partners can help identify other potential partners to bring to the table.

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■ STEP 3: Identify Opportunities for New Partnerships

Stakeholders are organizations that have an interest in or could benefit from connecting your residents to the Internet and related training. Partners are those organizations that have taken the next step: making a concrete commitment to support your digital inclusion efforts.

Create a local stakeholder map. A stakeholder map is a useful tool to identify existing and potential partners to support your CHUSA program. You can use the **Stakeholder Mapping Template** included in this toolkit as a guide for identifying stakeholders in your community. Some of the identified stakeholders will likely be existing partners. Other stakeholders may be strong candidates for fulfilling other community needs.



Tip: *The Stakeholder Mapping Tool and the Partner Inventory Worksheet can be used in conjunction with one another. While the Partner Inventory Worksheet can be used to identify existing partners and their contributions (as well as gaps) the corresponding Stakeholder Mapping Tool can provide a useful visualization of how partners relate to one another and where there may be opportunities to create new partnerships.*

Consider national stakeholders. In addition to local partners, various national organizations can help to fill key gaps in addressing the identified needs of your community. National stakeholders may be able to provide funding, subject matter expertise, advocacy support, or other useful resources. National stakeholder organizations may include federal agencies, foundations, think tanks, corporations, and others. See **Playbook Chapter 2** for more information.

Building Partnerships. When establishing new partnerships, it is important to perform due diligence research to evaluate the potential risks and benefits of being associated with a prospective partner. Potential risks include:

Reputational risk – Partnership with an organization carrying a poor public image can negatively impact the reputation of your organization as well as others involved in your CHUSA initiative. As part of your due diligence research, you should evaluate the public image of the potential partner and assess whether there are any issues such as pending lawsuits, or negative media coverage, that may be a cause for concern.

Implementation risk – As part of your due diligence, you should also evaluate whether the potential partner has the capacity to deliver on their expected contributions to the initiative. Financial stability, stability of organizational leadership, and staff bandwidth are a few indicators that can be used to help assess the organization's capacity to contribute successfully and carry out the collaborative activities as planned.

Conflicts of interest – It is also important to avoid any conflicts of interest or perceived conflicts of interest that may result from associating with the prospective partner organization. Potential conflicts may include pending business with the PHA, or with another partner involved in the initiative, which may give rise to the appearance of undue influence by the partner over the outcome of decisions related to the pending business concerns. Another potential conflict may exist when one partner organization is regulated by another organization involved in the partnership. The opportunity for conflicts of interest does not have to preclude partnership altogether, but potential conflicts should be identified and disclosed, and any required controls should be established as early in the process as possible.

STEP 4: Establish Standards for Partner Engagement

Define shared goals. When partners have been identified, the next critical step is to clearly define the common goals of the partnership. While all organizations involved in the partnership will share a common interest in one or more aspects of digital inclusion, it is also likely that the partnering organizations each have differing interests and incentives. Acknowledging these differing incentives and clearly articulating the objectives will allow for smooth implementation of both the partnership and the associated activities.

Define roles and expectations. In any partnership, it is important to clearly define the roles and expectations of each partner. Articulation of partner roles should be explicit and mutually agreed upon. A common understanding of what each partner is (and is not) responsible for will allow for more efficient and effective collaboration. Key roles in a digital inclusion partnership include, but are not limited to, the following:

- Subject matter experts
- Community advocates
- Funding partners
- Research partners
- Outreach partners
- Internet Service Providers
- Providers of digital literacy services and training
- Providers of devices and supplies

Establish decision-making process. Transparency, accountability, and inclusion are key elements of a strong partnership. A fair and inclusive process for decision-making should be developed and adopted by the partnering organizations at the outset of the partnership. Common understanding and agreement on the process through which major decisions will be made will help to avoid confusion and potential conflict as planned activities are undertaken by the group.

Create an MOU. For longer-term partnerships, it is good practice to execute a Memorandum of Understanding (MOU). An MOU is a non-binding agreement between the partner organizations that establishes guiding principles for the partnership and articulates the common objectives and expectations of each partner. An MOU is an effective tool for ensuring and documenting common understanding of the goals of the partnership and the roles and expectations of each partner.



Tip: An MOU template is included in this toolkit. The template can be downloaded and edited to meet your needs.

STEP 5: Manage Partner Relationships

Create a partner inventory. Once the standards for engagement are in place, partners can begin the important work of advancing digital inclusion in your community. The **Partner Inventory Worksheet** included with this toolkit is a useful tool for keeping track of partner organizations, their roles, key points of contact, and other important notes. As new partners join the effort or as points of contact change, this inventory should be updated accordingly. The ability to quickly reference this information will allow for more effective management of partner relationships. It is also a good practice to make this document accessible to all partners to facilitate communication and coordination between all stakeholders involved.



Tip: A sample **Partner Inventory Worksheet** is provided as part of this toolkit. This worksheet can be downloaded and populated with information about the partners serving your community.

Develop a partner communication strategy. In managing partner relationships, it is helpful to develop a partner communication strategy. Refer to the **Partnership Communication Strategy Guide**, included with this toolkit for more information. This document details the processes through which partners can maintain strong communication over the life of the partnership. Your communication strategy should include:

- Standards and guiding principles for effective communication
- Designated communications lead(s) within each organization
- Communication channels that will be used (e-mail, website, etc.)
- Objectives and frequency of standard check-in meetings



Tip: The **Partnership Communication Strategy Guide** included in this toolkit describes key components of a communication strategy as well as best practices for maintaining strong communication among partners.

Monitor progress, address challenges, and celebrate wins. As work is being carried out, you should continually monitor the progress of collaborative efforts, and communicate regularly with partners on this progress. Issues and challenges should be highlighted early and addressed in a fair and transparent manner. This will allow for constant refinement of your approach and ultimately better outcomes. Celebrating accomplishments and crediting strong performance is also very important. Highlighting success and celebrating wins helps partner organizations feel valued. Recognizing partners can also lead to stronger relationships.



■ STEP 6: Expand Partnership Opportunities

Look out for new partnership opportunities. As your initiative grows and evolves, keep an eye out for the opportunity to add new partners to help fulfill emerging needs or goals. New partners may present themselves through the networks of existing partners. You may also encounter new partnership opportunities through your ConnectHomeUSA convening. By continuously expanding partnerships, CHUSA staff can bring additional resources and a broader range of ideas and perspectives to bear thereby strengthening and growing the impact of your digital inclusion work.

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