

# City of Edmonton

ENRICHING LIVABILITY THROUGH PARTNERSHIPS



**Capstone Report**  
**Leadership ICMA Project Team**  
**June 2014**

# Contents

<b>Executive Summary</b>	<b>1</b>
<b>Definition of Partnership</b>	<b>3</b>
Community Services Relationship Matrix .....	3
<b>The Future of Partnerships in the City of Edmonton</b>	<b>6</b>
Feedback from a staff input session in March, 2014.....	7
Ideal Future for Relationships in Edmonton .....	8
Value of Partnerships .....	10
The Challenges of Partnering.....	11
<b>Recommendations</b>	<b>12</b>
1. Create a dedicated partnership team .....	12
2. Develop and maintain a focus on design .....	13
3. Establish the partnership team as a results-based, data-driven entity .....	14
4. Develop a robust and relatable communications strategy .....	17
<b>Case Studies</b>	<b>19</b>
1. Denver, Colorado .....	20
2. Fairfax County, Virginia.....	24
3. Boston, Massachusetts .....	27
<b>References</b>	<b>29</b>
<b>Contact Information</b>	<b>30</b>
<b>Appendices</b>	<b>31</b>
1. Appendix A: Staff focus group handout.....	32
2. Appendix B: Highlights from Denver Office of Strategic Partnerships interview.....	33
3. Appendix C: Highlights from Fairfax County Office of Public Private Partnerships interview .....	35
4. Appendix D: Highlights from Boston Office of New Urban Mechanics interview .....	36
5. Appendix E: Digital resources provided to Community Services staff for additional research .....	38
6. Appendix F: Partner survey tool.....	39

# Executive summary

Leadership ICMA responded to a request for peer assistance by the City of Edmonton, Alberta, Canada (Edmonton) to evaluate how to best use partnerships to accomplish the Transforming Edmonton vision. Edmonton's Community Services Department is taking the lead on creating a more structured and strategic approach to managing current partnerships and identifying and implementing new partnerships. The team conducted a literature review, on-site staff focus group, and interviews with leading municipalities in this field. The team researched public-private organizations and U.S.-based local governments to find examples that could guide Edmonton in building a new partnerships initiative based on:

- Return on investment;
- Performance measurement;
- Strategic value;
- Partnership agreements/contracts; and
- Staff and leadership engagement.

This report is the product of that research, including three case studies and recommendations.

## Case studies

Of comparably sized cities or counties, there are only a few that have a comprehensive and coordinated partnerships program. According to one of the communities interviewed, they are aware of fewer than 20 such programs in the U.S. in total, and few are in a sustainable state—the roster is in flux with offices appearing and disappearing with staff and policy changes.

Three communities stand out though, based on how they started and where we believe Edmonton is headed.

- Fairfax County, Virginia's Office of Public Private Partnerships (OP3)
- Denver, Colorado's Office of Strategic Partnerships
- Boston, Massachusetts' Mayor's Office of New Urban Mechanics

## Recommendations

Examples of true, high-performing partnerships are rare because they are “difficult to create and even harder to sustain,” according to a 2003 report by the National Academy of Public Administration.<sup>1</sup> While it's not uncommon for organizations to recognize the value of partnerships and dedicate resources to their development, the ones leading the pack go significantly further. Resources are not only dedicated, they are aligned according to a strategic vision, with driving force, superlative communication methodologies, and unwavering performance measurement. This report contains four primary recommendations with action steps for each; these are detailed fully in the recommendations section. These recommendations are based on conversations held with Community Services Department staff, case analysis, literature review of partnership research, telephone interviews with U.S. local governments that are operating at a level to which Edmonton aspires, and lessons learned from high performance organization leadership curriculum. We envision a future for Edmonton where partnerships are not created scattershot or managed by and for a single department, but in a coordinated and efficient way, sharing information across city teams, creating more true joint ventures for the city, and making more connections between groups with similar interests in making Edmonton a great community to live, work, and play. The recommendations are:

1. Create a dedicated partnership team;
2. Develop and maintain a focus on design;
3. Establish the partnership team as a results-based, data-driven entity; and
4. Develop a robust and relatable communications strategy.

## Report limitations

While Edmonton may not be carving a new path, as noted above, the ground isn't very well tread. There are not many examples of communities with coordinated partnership programs, and all those examples are doing things somewhat differently. With certain endeavors it is wise to borrow from what others are doing, but always test and iterate. Another community's plan will likely not work exactly for Edmonton. As Ron Carlee, city manager of Charlotte, North Carolina has said, local governments come in 34,000 flavors in the U.S.; each one is unique.<sup>2</sup> The new partnerships team will need to create its own identity unique to Edmonton and responsive to its constituencies.

## Why now?

Edmonton is on the forefront of exploring new strategies for how local governments deliver services to their constituencies. The dynamic challenges and services demanded by communities need coordinated efforts by the city and its neighboring communities, businesses, non-profits, residents, and staff teams. Cities can no longer do this alone. Cities *should* no longer do this alone. Communities and regions that do not begin to act now may struggle to be competitive in the 21<sup>st</sup> century as global competition for resources, business, and labor increases, and innovation continues to rewrite the landscape of how we do business at an ever quickening pace. There is no better time than now.

# Definition of partnership

## Why define partnerships?

As City of Edmonton staff and the Leadership ICMA project team worked together to generate inventory of existing partnership relationships Community Services is engaged in and elicit feedback through staff focus groups, it became evident that the word “partnership” is used and understood in many different ways throughout the organization. This is quite common among organizations. In fact, a leading research report focusing on successful partnerships, entitled *Powering the Future: High-Performance Partnerships* and produced by the National Academy of Public Administration in the United States of America, found that “organizational relationships fall along a continuum. At one end, organizations may actually work on the same issues but compete for resources, recognition, and results...A high-performing partnership is at the other end of the continuum where organizations work in an integrated structure and achieve meaningful outcomes beyond what any one of them could accomplish alone. Between them are such organizational interactions as coexistence, cooperation, contracts, collaboration and simple partnerships.”<sup>3</sup>

Similar to the varying types of relationships identified by Community Services staff, it is clear that each working relationship has its purpose, as well as varying degrees of effort and oversight. For example, merely coexisting with another organization versus a joint effort between a city department and another organization to achieve a common goal is vastly different. *Powering the Future* uses case studies to prove that in order for complex and challenging issues to be solved with extraordinary results, the combination of entities in the form of a high-performance partnership is needed.

The City of Edmonton has a bold vision of extraordinary results for Edmonton in 2040. *The Way Ahead: Edmonton’s Strategic Plan 2009–2018* sets six specific goals to achieve the vision. Among these six goals is to improve Edmonton’s livability. *Edmonton’s People Plan: The Way We Live* describes livability as “Edmonton is one of Canada’s most livable cities because it is welcoming to all, safe and clean, fosters its heritage

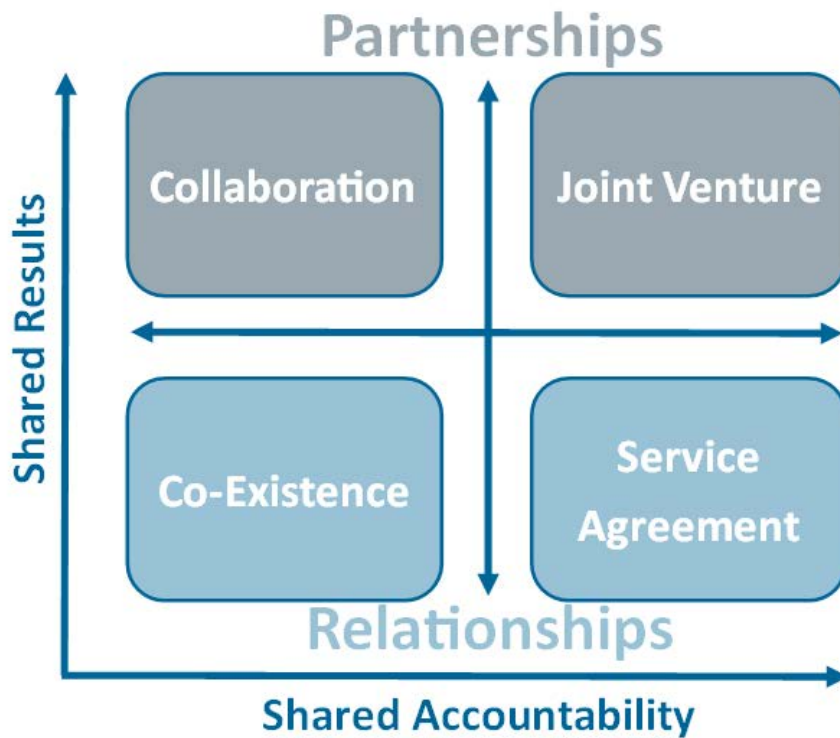
and supports its arts and multicultural communities, encourages active lifestyles through recreation opportunities and engages its citizens in the city vision and direction.”<sup>4</sup> Such a clear, extraordinary goal to improve Edmonton’s livability cannot be achieved by the city organization alone. Such results require the combined efforts of many stakeholders in the community. In order to enrich livability through partnerships, it is important to clearly define the various forms of relationships Edmonton has in order to identify, seek out, develop, and manage the necessary high-performance partnerships.

The ICMA project team developed the Community Services Relationship Matrix, as displayed on the following page, in order to categorize the many relationships the team discovered during research and discussions with Edmonton staff. The matrix displays the four main categories of relationships which Edmonton engages in, including relationships of co-existence or service agreements, and partnerships forged by collaboration or joint ventures. Although some partnerships or relationships will have characteristics that fall within more than one quadrant (i.e. a formal contract or agreement), it is important to distinguish the key differences of each quadrant.

## Community services relationship matrix

The X and Y axes of the Relationship Matrix (see page 4) demonstrate the level of shared responsibility and risk for various types of partnerships or relationships. The top two quadrants represent partnerships, or cooperative agreements where both parties have responsibility for and benefit from the results of partnership progress. The bottom two represent relationships, with shared accountability and responsibility for programmatic success, but perhaps less organizational investment in the outcome. Relationships may grow and change over time, crossing the boundaries between these categories. Conversely, depending on the circumstances, it may also be determined that a particular form of relationship is adequate in the long term to fulfill program goals.

## Community Services Relationship Matrix



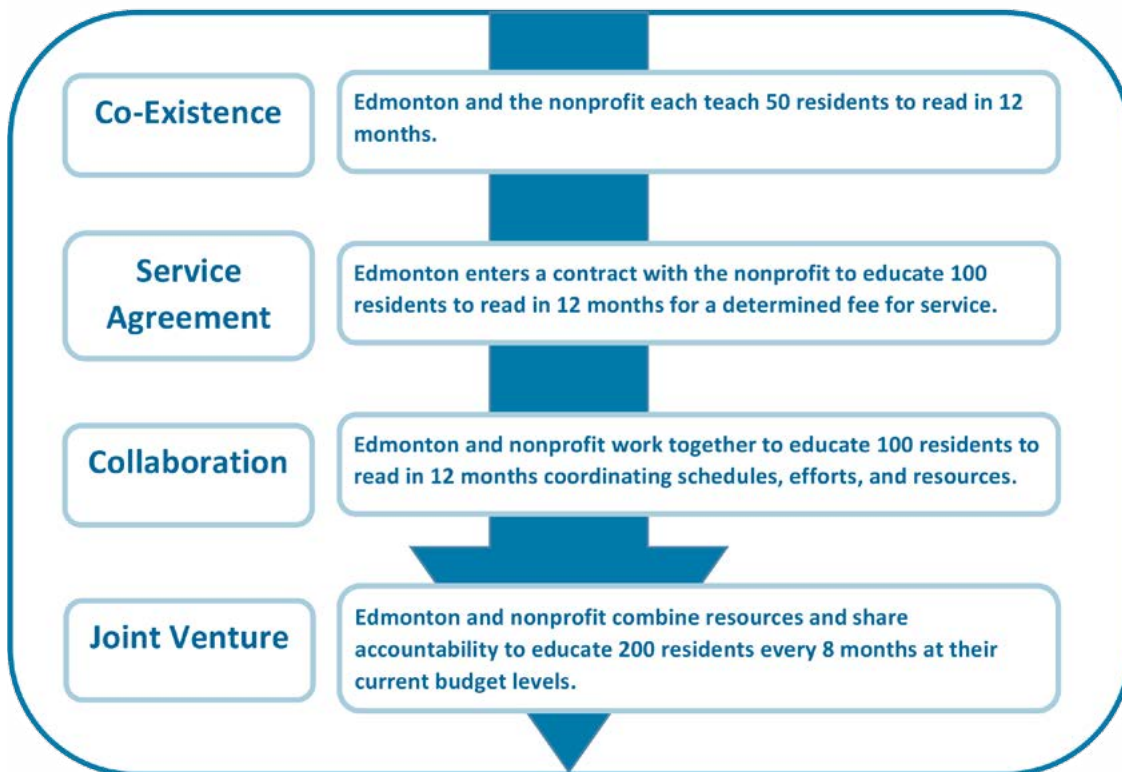
### Relationship matrix defined

Category	Definition
<b>Co-existence</b>	This is the simplest form of relationship, requiring little to no accountability or results. Typical co-existing relationships exist by nature of two organizations providing similar services, both benefitting the community, but without formalized structure or agreements. An example of a coexisting relationship would be local pet stores displaying Edmonton flyers for an upcoming vaccination clinic. Another example could include veterinarian clinics, non-profits, and Edmonton each holding separate vaccination clinics throughout the year, with little to no coordination, but all serving a similar purpose.
<b>Service Agreement</b>	The service agreement relationship is based on a formalized contract or agreement in which Edmonton selects an organization to perform a specific service for a defined cost. Edmonton sets the terms in the agreement or contract and holds the service provider accountable for the work they are bound to complete.
<b>Collaboration</b>	Collaboration is typically created via sponsorships, donations, or grants Edmonton selects to award a particular organization to aid that particular organization's efforts which Edmonton sees as valuable to the community and Edmonton's mission. Collaborations may also result through Federal/Provincial relationships or relationships created via professional associations. Edmonton currently awards grants to outside agencies as well as receives grants to aid a particular service.
<b>Joint Venture</b>	Joint ventures are partnerships which require joint results and accountability between Edmonton and its partner(s). A joint venture is a partnership in the truest form. Joint ventures are formed when the desired outcome or result requires the joint efforts of two or more entities to share resources, accountability, and decision making.

To further explain the difference between each relationship type, consider the following example: Edmonton sets a goal to increase the literacy rate among residents by 30 percent. A nonprofit agency in the area provides classes to people learning to read.

Unlike a relationship, a partnership establishes collaborative efforts to accomplish a specific purpose. A joint venture, or high-performance partnership, further ties the two or more partnering entities through shared outcomes, authority, decision-making, accountability, risk, resources, and benefits. *Powering the Future* states, “A high-performance partnership has two essential dimensions. First, it must have a structure

for the individual organizations to share authority, resources, and accountability for achieving a mutually decided goal. Some reorganization, merger, or redefinition of authority and responsibility takes place when the partnership is formed. Second, it must produce significant results. So, the second dimension takes the partnership to a higher level. A partnership is defined by its organizational structure and approach, while a high-performance one is defined by what it produces. A high-performance partnership does not necessarily begin as a sophisticated operation. It can develop incrementally from less intensive forms of collaboration.”<sup>5</sup>



## Definition of partnership

A binding, legal arrangement between The City and an organization, group, or individual to advance cooperatively a common goal, recognizing:

- Shared or compatible objectives and desired outcomes; and/or
- Share authority, decision making, accountability and results; and/or
- Joint investment of resources (people, dollars, time), shared risk taking, and mutual benefit.

A partnership in Community services recognizes that we are “in it” together, working hand in hand, united and focused on building something better together.

Where are we going, and when will we get there?

# The future of partnerships in the City of Edmonton

## Why partnerships?

Critical to the success of building a new structure and vision for how Edmonton manages partnerships is identifying, as simply as possible, why the city wants to engage partners. This may seem a superfluous question, but how it is answered is critical to building Edmonton's brand, method of working with partners, tone of engagement, and how staff fosters cross-department cooperation to fulfill the strategic plan.

It is clear from discussions with Edmonton's management and staff that creating a new approach to better coordination with partners is desired to bring staff, businesses, non-profits, and residents together to better pave the pathways drawn in *The Way We Live*. Taking a page from classic economics, the law of comparative advantage aids in thinking about service delivery differently. A service may need to be provided, or there may be enough demand for a new service, but is it best serviced by a city department? And with what resources? Are there overlaps in the service delivery with other municipalities or private entities? No resources are limitless, and scarcity is compounded when we consider that they could always be repurposed for another goal. Creating a framework to evaluate partnerships and service delivery can aid best use of resources, or help point to a better way.

The challenges and demands communities face will not lessen over time regardless of policy changes, the whims of residents, variations in the weather, or the steadiness of resources. Leaders in well run communities are changing the traditional idea that the local government is the sole service provider to one that positions local governments as a facilitator of services, whether or not these services be delivered directly, coordinated or shared. Cities can no longer do this alone. Cities *should* no longer do this alone. Why? The dynamic challenges and services demanded by communities need the coordinated efforts of local governments and their neighboring communities, businesses, non-profits, residents, and staff teams.

## How to get it done

Just like working together through partnerships can lead to better results and a stronger, more connected and vibrant community, staff relationships benefit from the same interconnectedness. Innovation thought leader Frans Johansson suggests that the best innovations happen at the intersection of ideas and cultures.<sup>6</sup> Each branch, section, and team is its own community, relative to the rest. Harnessing ideas by bringing diverse teams together will begin to spark creativity and build connections needed to not only keep up with the rapidly changing world, but to help drive some of that change in further establishing Edmonton as a city of the future.

An enormous amount of work has gone into developing the 30-year vision for Edmonton. Every department and branch has a stake in making Edmonton a great place to live, work, and play, and their responsibilities overlap. Teams should not only be continually asking, "Who else in my branch/department/the organization could I be working with to accomplish this goal?", but also, "Whom in the community can we work with to improve results and best meet community needs?" Simple information sharing and relationship building is the easiest way to start connecting departments' disparate synapses. As more connections are made, ideas and connections grow exponentially as work groups get to know each other's skills, contacts, needs, and goals. Great networks are built when people find ways to help others, or share something that they think will be useful to a colleague to help meet a known challenge.

## Creating an identity

An important step in the success of a ramped-up partnerships paradigm is making sure the team identity and mission is solid from the beginning. All team members need to know their purpose, mission, and share the vision of where you are going together. Having a piercing clarity of vision, as in the apocryphal story of U.S. President Lyndon Johnson's visit to NASA,<sup>7</sup> is critical to future success. Also, for staff organization-wide to



believe in and support this new program they need to believe that leadership is committed to the new program. In the staff focus group, some expressed frustration that new initiatives or policies can come with much fanfare but can fizzle and not without notice (see the next section, “What Do Staff Have to Say?”). It is critical to honor and recognize work that is in place and fit what’s appropriate into the new system, update what can be, and study or set aside what isn’t working or is no longer valid.

The Community Services Department, and indeed Edmonton as a whole, is cutting a new path for itself, and there are other organizations that have cut similar paths in their own way. This report contains case studies of such examples, and studying what these leading-edge local governments are doing, cataloging what Edmonton is doing, and discovering the difference will begin to light the way forward and help form the identity the new team wants for itself. Key to this is defin-

ing your own identity. Taking a plan off someone else’s shelf directly will likely not work in the long term.

Mapping strategies and tactics in *The Way We Live* to current partners will begin to show a skeleton framework that can be built upon. Edmonton shares a vision for the future, and an integrated partnerships program can be key connective tissue between the city departments, area businesses, and residents. This will help move Edmonton’s identity with current partners from one of donor to maker of matches and facilitator of funding.

Lastly, engrave a focus on “the why” into the soul of the team. This will help ensure the mission isn’t lost or doesn’t drift over time. Know thyself, and the rest will follow. Trained ethnographer and successful author and speaker Simon Sinek teaches that as a matter of biology, humans base decisions on, and are motivated by purpose, or “why” they are doing something, more than “what” they are doing.<sup>8</sup>

## What do staff have to say?

Feedback from a staff input session, March 2014

A staff focus group was conducted during the site visit from the ICMA project team in March, 2014. Community Services staff were invited to participate based on their involvement with partnerships, which ranged from grant-making to ongoing relationship management. The goal of the session was to gather input about the current methodology for managing and developing partnerships, and discuss ideas for what could be done differently.

The goal, as it was explained, was to be more strategic, to be more thoughtful in the approach to seeking out, developing, and maintaining mutually beneficial relationships with outside organizations. Ultimately, the work of these partnerships helps to advance the initiatives and long-term vision of Edmonton.

Participants were put in small groups to discuss the topic and report out on their discussion. Groups were self-directed and spent an afternoon brainstorming and reporting to the other groups.



*City staff and LICMA team discussing how Edmonton currently works with partners.*

## Outline for group instructions

<b>Outline the team's current experience in working with partners.</b>	<ul style="list-style-type: none"> <li>• What value do partnerships bring to your work?</li> <li>• Why does Edmonton engage with partners?</li> </ul>
<b>Identify ideal future for how Edmonton develops and manages partnerships</b>	<ul style="list-style-type: none"> <li>• Five years from now, what would you like our relationship with partners to look like?</li> <li>• How do we get something better than where we are at today?</li> </ul>
<b>Identify current reality</b>	<ul style="list-style-type: none"> <li>• What progress has Edmonton already made towards this outcome?</li> <li>• What challenges do you face in working with partners?</li> </ul>
<b>Outline action steps</b>	<ul style="list-style-type: none"> <li>• What actions are needed to get us to that vision?</li> <li>• What changes are needed?</li> </ul>

The result of the focus groups was an insightful discussion on the value of partnerships, and how Edmonton could streamline the approach to developing and maintaining them. The focus groups were

eagerly engaged and offered many suggestions and recommendations. Of these comments, four main categories of action items stood out, as displayed below.

## Ideal future for relationships in Edmonton

### Action steps



#### ***Increase structure & rigor***

Institutionalize concrete mechanisms to formalize how relationships are managed including:

- agreements
- outline of roles/responsibilities
- legal standards and recommendations
- performance measurement & follow up



#### ***Define it & create a visual model***

Develop a unique Edmonton definition of relationships and create a way for people to visualize the various categories. Creating a common language to talk about it will help staff approach the same issues with the same strategies.



#### ***Build on success of past***

Numerous examples were provided of highly valuable relationships, internal tools, and staff resources. Building on this experience will help advance this initiative faster than starting from scratch.



#### ***Educate***

Train all staff on any new policies or procedures. Having a new set of definitions or rules on paper is not effective if they aren't shared and discussed. These policies will also need to grow and adapt to new circumstances, and these trainings will provide opportunities for feedback.

## Current reality

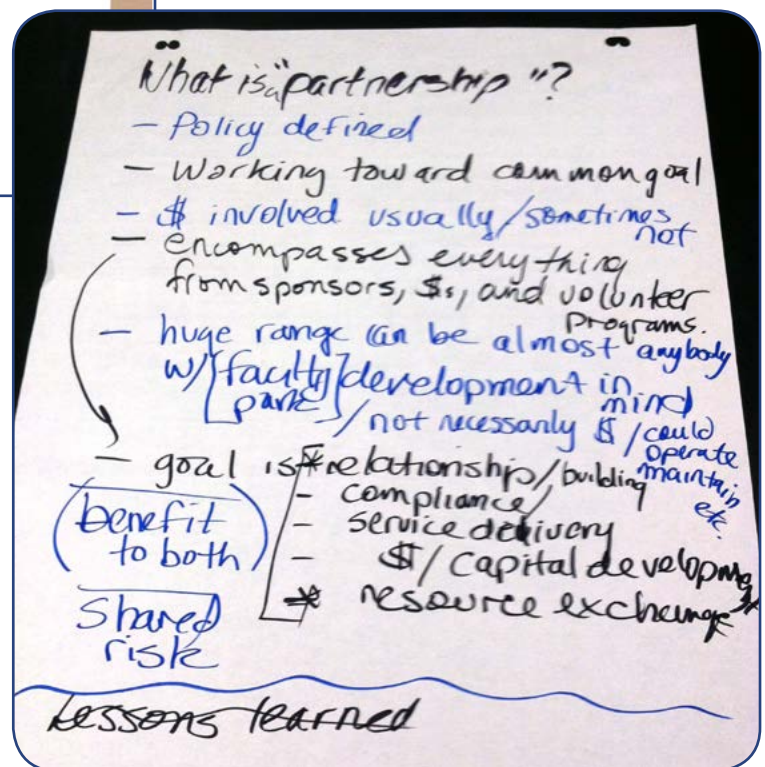
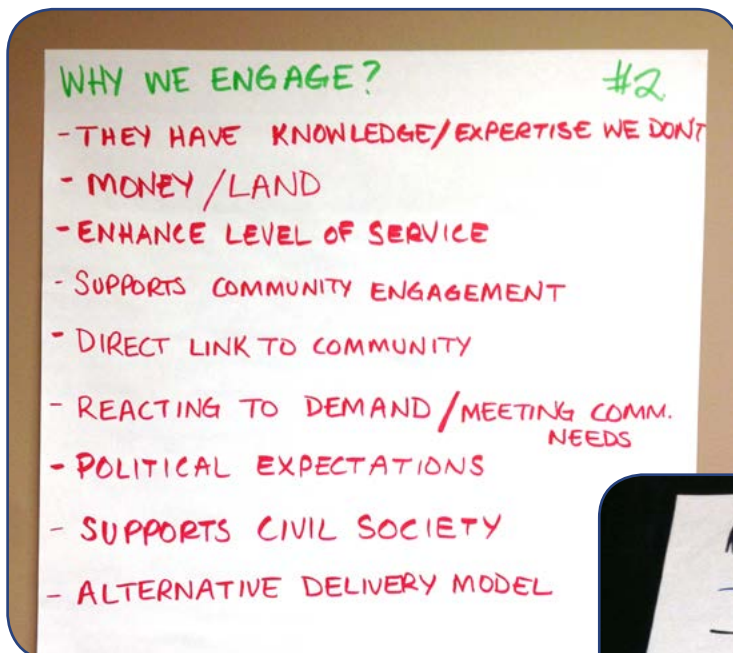
What was clear from the feedback is that relationships are critical to the success of partnerships, and staff are highly engaged in the concept of making them work effectively. Relationships help to build capacity by capitalizing on the strengths of other organizations. While there are challenges that must be addressed in this effort, it is important not to overlook the successes of the past. Internal resources exist that can be leveraged as the strategic agenda to advance partnerships moves forward.

The challenges identified for moving to the ideal future are outlined below. Whenever feasible, this list uses the language/phrasing of the meeting participants in order to provide a clear understanding of the feedback received.



# Value of partnerships

Issue	Description
<b>Access to a different set of resources.</b>	<ul style="list-style-type: none"> <li>• Includes (but is not limited to) financial resources and property/facilities.</li> <li>• Partners have knowledge and expertise specific to their area of focus.</li> <li>• Brings diversity to the service delivery model.</li> </ul>
<b>Support community engagement and civil society.</b>	<ul style="list-style-type: none"> <li>• Developing relationships is just a part of the way Edmonton does business.</li> <li>• Establishing relationships creates closer connection to the community and promotes civic engagement.</li> <li>• Creates goodwill.</li> </ul>
<b>Assistance in properly identifying issues and potential strategies.</b>	<ul style="list-style-type: none"> <li>• Links with community groups help to properly identify priorities/strategies on a specific issue.</li> <li>• Partners may know the issues better, and therefore be better suited to deliver the service.</li> </ul>



# The challenges of partnering

Issue	Description
<b>No clear definitions of “partnership” exist.</b>	<ul style="list-style-type: none"> <li>• Some organizations commonly referred to as “partners,” may not fit the true definition.</li> <li>• People need a way to visualize the definition and a common language to talk about it.</li> </ul>
<b>More structure is necessary.</b>	<ul style="list-style-type: none"> <li>• All relationships should have something in writing.</li> <li>• Funding agreements should be developed.</li> <li>• Define a process for decision making at the onset of the relationship.</li> <li>• Staff roles/responsibilities in the process are not always clearly defined.</li> </ul>
<b>Staff needs a way to determine when a proposal is not a valuable use of resources, or has lost its value over time.</b>	<ul style="list-style-type: none"> <li>• Staff needs a way to say “no” to a proposal that is not going to be valuable to the strategic goals of the organization.</li> <li>• If a particular organization has been problematic it should be “flagged” so other staff can be aware of the issue. (ex. Late payments, incomplete paperwork, etc.)</li> </ul>
<b>Equity of process varies significantly.</b>	<ul style="list-style-type: none"> <li>• Better define internal roles/responsibilities to ensure that all applications can receive a similar level of support.</li> <li>• Would be helpful if all applicants received the same direction regardless of who they contact: staff in various departments, elected officials, etc.</li> </ul>
<b>Tools and resources exist that not everyone is aware of.</b>	<ul style="list-style-type: none"> <li>• Examples were given of data and performance measurement tools that are already in use, which could be helpful to creating uniformity.</li> <li>• Several staff in the room had valuable expertise.</li> </ul>
<b>Processes must be flexible enough to recognize and accommodate unique circumstances.</b>	<ul style="list-style-type: none"> <li>• Not all relationships fall into a specific category.</li> <li>• There needs to be flexibility in any processes to recognize the value of unique circumstances that may bring high value to the community.</li> </ul>

# Recommendations

We have four primary recommendations, with actionable steps for each. These recommendations are based on conversations held with Community Services Department staff, case analysis, literature review of partnership research, telephone interviews with U.S. local governments that are operating at a level to which Edmonton aspires, and lessons learned from high performance organization leadership curriculum.

## 1. Create a dedicated partnership team.

Examples of true, high-performing partnerships are rare because they are “difficult to create and even harder to sustain,” according to a 2003 report by the National Academy of Public Administration.<sup>9</sup> While it’s not uncommon for organizations to recognize the value of partnerships and dedicate resources to their development, the ones leading the pack go significantly further. Resources are not only dedicated, they are aligned according to a strategic vision, with driving force, superlative communication methodologies, and unwavering performance measurement.

Richard Norment, the former Executive Director of the National Council for Public-Private Partnerships, identified several key factors for successful public-private efforts:<sup>10</sup>

- Leadership by the public sector, in communicating with all the stakeholders.
- Managing the partnership from first concept, through the negotiation process and finally in oversight of the partnership.
- Using performance goals instead of design criteria in contracts, thus allowing innovative and cost effective approaches from the private sector.

The local governments within the United States that are leaders in fostering partnership development have created dedicated teams or offices. See the Case Studies section for three examples. The level of integration within the organizational structure varies, but for Edmonton’s new partnership team, a “hub-and-spoke” system is recommended. Under this structure, a small core team of staff would be dedicated solely

to the partnership office and goals. Additional responsibilities would be assigned to staff in other divisions. As was stated by Megan Davenport, Project Coordinator for the Denver Office of Strategic Partnerships:

*“You can get a lot done with pieces of people’s job descriptions provided there are clear expectations outlined. Things really take off when the collaborative efforts have a full time dedicated staff.”*

Community Services has long recognized the value of partnerships. This experience provides a valuable stepping stone, as several internal resources already exist that can support the goals of the newly developed office.

## Action Steps For Creating A Partnership Team

### Develop a “hub-and-spoke” model for the new team

Team should consist of a small core of full-time staff dedicated to the partnership goals with additional responsibilities assigned to staff in other divisions within the organization. There may be a temptation to consolidate staff quickly from different departments or branches into a central hub, and that could be an eventual goal. But that action could lead to early challenges that may harm the team identity and relationships both internally with the team and externally with departments and branches that a partnerships program will need for long term success.

**Example:** The Fairfax County Office of Public Private Partnerships considered a large consolidated team, but decided it would be more beneficial to have staff in different agencies still connected to their relationships. Managers also would not lose good staff to a new team.

The hub and spoke model, properly executed, also serves the purpose to avoid a centralized office relieving staff of all partnership work, but a team integrated with front line staff guiding them in partnership efforts.

### **Create a new team charter and mission**

The team charter will help solidify the new team culture, how the team interacts with other branches and departments, external audiences, and how Edmonton corporate values are integrated. The mission statement defines what the team is trying to accomplish with crystal clarity. This will also help define and create the team identity.

**Example:** *Denver Office of Strategic Partnerships:* To serve as a catalyst to leverage the best of Denver’s public and nonprofit sectors to engage in innovative and collaborative work.

**Example:** *Fairfax County Office of Public Private Partnerships:* (Excerpt) Serve as a clearinghouse for existing partnerships and a central point of contact for businesses and community organizations wishing to partner in Fairfax County.

### **Prepare a team vision**

Designing what kind of a team you want to be in the future is the only way to get there. Part aspiration and part strategic plan, designing a vision will propel the mission statement on the path forward.

### **Clearly define roles and expectations**

Ensure that members on the core and expanded team have clear understandings of what is expected of them, especially during the establishment phase for the team.

### **Conduct teambuilding and communication exercises early in the process**

The leading examples of municipalities with dedicated partnership offices ensure that staff have a clear understanding of the mission and strategic goals.

## **2. Develop and maintain a focus on design.**

It is necessary to pay attention to design concepts when undergoing periods of change and innovation. In his book *Change by Design*, IDEO CEO Tim Brown suggests that “design thinking” applies to any effort people undertake to improve quality or find better ways of doing things.<sup>11</sup> You can design better processes, better brands, and better outcomes with proper planning attention to design theory and application.

The recommendations below task Edmonton’s team to focus on design as the partnership team is created. Design challenges to undertake include:

- How are we going to form our team?
- What are our short, medium and long-range goals?
- How will we interact with each other on the team? With other branches? With external partners and parties?
- In considering continuous improvement, what goals do we want to set for ourselves? How often should we assess ourselves? Against what measures?
- What does innovation mean to us?
- What other questions should we ask ourselves?

## **Action Steps For Maintaining a Focus on Design**

### **Design and adopt definitions of relationships and partnerships**

There are many working relationships Community Services already has with private sector and non-profit groups. Critical to knowing how you want to work with partners is agreeing on what a partnership is, and what that means for a new team.

### **Connect back into *The Way We Live* plan**

As part of each design process, the team should ask how the task connects back to and supports the overall department and city vision.

**Example:** The [Denver Office of Strategic Partnerships](#) created a strategic plan which is concise yet powerful. The vision, mission, key goals, and strategies are demonstrated on a single graphical page.

**Example:** In the Partnership Criteria, the Fairfax County Office of Public Private Partnerships requires a partnership to “address a Fairfax County priority or help meet an identified community need” in order to be considered.

### **Create opportunities for information sharing and working together**

Any decisions that a new central partnership team makes need to be owned by the branches responsible for implementation. Creating information sharing lunches with branch managers and staff, strategy

meetings, branch outreach events, or even social activities will facilitate increased communications across the Community Services Department, and the city as a whole. This leads to building better relationships, reducing conflict, and ideally discovering new “network nodes” where staff discovers common goals or common service needs that can help increase the city’s overall performance and innovation.

**Example:** The Fairfax County Office of Public Private Partnerships created numerous methods to improve communications, from simple staff “lunch and learn” events and a joint chamber of commerce information exchanges to an annual awards program. Consider making events recurring or annual, such as the March 2014 staff input session jointly facilitated by Leadership ICMA, or a similar focus group or staff retreat.

### **Send team executives to leadership training related to innovation and high performance**

We recommend that Edmonton continue the process of organization transformation by sending partnership team leaders to the high performance organization training at Senior Executive Institute (SEI) or the Leading, Educating and Developing (LEAD) programs,<sup>12</sup> or another training opportunity focused on innovation and high performance.

### **Create an inventory of internal resources**

Defining, categorizing, and knowing all the existing relationships and partnerships Community Services already has is critical to ensuring continued good relationships, as well as identifying what is going well, what successful practices can be scaled, and what needs to be revisited or discontinued. The new team should eventually expand to identify all relationships and partnerships across the city as a whole.

Additionally, it’s important to know all the staff who are engaged in partnerships, what other resources the organization has, and what roles and responsibilities can be put to work for partnerships. With a roster of skills and resources the team can then identify gaps or redundancies for more efficient time and resource allocation.

**Example:** When staff turnover occurred at the Fairfax County Office of Public Private Partnerships, they took the opportunity to re-evaluate their skills and needs. As a

result of this exercise, they filled the vacant position with a new staffer focused on bringing corporate social responsibility to their partnership conversations.

### ***Design partner and staff surveys/focus groups***

It is critical to establish a baseline of opinions and perceptions among current partners and team members. This will help identify red flags that need to be addressed, as well as unknown bright spots.

Designing effective focus groups based on the surveys will help close any perception gaps, build relationships and get parties working better as a team. This is critical—a poorly designed or executed participatory meeting can backfire and set relationships back. Appendix E is a survey tool prepared by the ICMA partnership team ready for surveying further staff and existing Edmonton partners.

### **Focus on accomplishing three tasks within six months**

Pick three design concepts that will help establish the team on solid footing with a completion goal of six months from creation of the team. Trying to do too much can create poor results, or lead to too many incomplete activities open at once. Performance evaluation and employee satisfaction research<sup>13</sup> proves that having a sense of accomplishment or completing a task is a factor in creating positive morale. Take on three important first steps that can be completed, complete them, then celebrate and move on to the next ones.

## **3. Establish the partnership team as a results-based, data-driven entity.**

Considering that the purpose of high-performance partnerships is to accomplish extraordinary results not possible for one organization to accomplish on its own, it is essential to develop a means by which partnerships are (1) selected and (2) measured. Early efforts to establish performance measurement as a central operating tenet will be repaid several times over. Accurate performance data can expedite financial decisions, allow for equitable comparisons across programs, and help communicate results to stakeholders.

Effective performance management is challenging and must be specific to each partnership. It is important to note that research and case studies prove this to be a difficult task, and there are pioneers needed



for this effort. Edmonton could be a leader by creating clear and practical metrics and data collection tools within the partnership team.

A common pitfall is to measure what data is readily available, but in order to effectively measure the performance of each partnership, key indicators must clearly show how well the purpose, or goals are being met. The research report *Powering the Future* claims two specific criteria to which partnerships are measured by:

*The first [measure] is the effectiveness of the partnering process as an organizational model. The second is the partnership's actual performance in producing significant, quantifiable improvements in community or client conditions.<sup>14</sup>*

## Measuring Performance of Partnerships

Branches and departments— independent of each other— establish relationships with outside organizations to accomplish their goals. However, it is important there be a centralized clearinghouse and process for establishing all forms of partnership in the matrix, but most importantly with collaborations and joint ventures. The process for selecting partners must be simple, yet specific enough to address whether the partnership clearly establishes the potential for results that could not be achieved by either party acting alone.

## Action Steps For Creating a Focus on Performance Measurement

### **Develop a rubric to evaluate potential partnerships or re-evaluate existing partnerships when the scope or vision has changed**

In order for the partnership team to effectively evaluate whether a potential partnership should begin or continue, it is essential a common set of criteria be adopted that assure the partnership is necessary and has the potential to fulfill vision and goals in *The Way We Live*. It is important the rubric be simple and directly tied to the purpose of Edmonton partnerships. Be sure to evaluate and reinvigorate existing processes and tools to meet these needs, and ensure consistency of application across partnerships.

**Example:** [Fairfax County, VA](#) has a simple, yet effective example which includes three criteria that must be met for a partnership to be created or continued.

1. Does it address a Fairfax County priority or help meet an identified community need?
2. Are there shared interests and mutual benefits for public and private sector partners?
3. Is it likely to leverage new resources, expand capacity, or reduce costs?

### **Establish the partnership team as the clearinghouse for decisions related to partnerships**

Establish the partnership team as the body which determines whether a potential partnership meets the criteria to establish a formal partnership. This maintains a fair, consistent, and unbiased review to ensure partnerships meet defined criteria. This also ensures a standard, formal agreement template is used which clearly stipulates the performance outcomes and purpose of each partnership. The partnership team also needs to be apprised of all relationships as well, but may not need to be involved in determining whether they are formed. As the central clearinghouse the partnership team should establish and/or improve upon existing standardized contracts, grant application requirements, procedures, and review processes.

### **Create a partnership inventory**

Inventory should incorporate a database of all current coexisting and service agreement relationships and all collaborative and joint venture partnerships. At minimum this database should identify partner contacts, Edmonton employees who manage the partnership, and the specific goal(s) that create the purpose for the partnership. Each goal should correspond to an identified objective from *The Way We Live*. We also recommend you apply the relationship matrix to all connections, and formalize each existing contact through the processes, contracts, or procedures specified through the clearinghouse.

### **Proactively seek to establish effective joint ventures**

Serving as both the centralized clearinghouse and manager of the partnership inventory, the partnership team needs to take the lead in seeking out and identifying potential high-performance partnerships through joint ventures. Potential joint ventures may be birthed

through the expansion of current co-existing relationships, service agreements, or collaborations. The partnership team should also seek to identify those outside agencies and organizations who have a similar mission or vision as Edmonton. Joint ventures may also be established through an aggressive effort of the partnership team to identify those organizations in any sector that may have a social responsibility to dedicate resources each year to charitable or social causes, and demonstrate how Edmonton has opportunities to joint venture to accomplish those efforts.

### **Measure only what is important, what you care about, and what adequately displays results**

While this is much easier said than done, identifying metrics that get to the core of what you are trying to accomplish is key. The metrics should directly identify how successful the partnership is, as compared to solely providing the service. To assure high-performance partnerships, it is important that a clear purpose for the partnership is identified and agreed upon early on in the process. It is critical this purpose remains at the forefront throughout the life of the partnership. The challenge becomes the battle of bureaucracy versus high-performance. Defining the mission (why), the shared outcomes, authority, decision-making, accountability, risk, resources, and benefits (how), and the desired end result (what) will help in this effort.

**Example:** Ensure a city department and a nonprofit identify a clear purpose to partner. Next comes designing shared outcomes, authority, decision-making, accountability, risk, resources, and benefits. Specifically, when it comes to the design of measuring outcomes and processes for decision-making, it is easy for the focus to lessen on purpose and increase on steps, forms, and process. Remembering why the partnership was created may become less clear and high-performance may diminish.

### **Develop a processes to allow partner groups to measure Edmonton's effectiveness as a partner (including staff, department, overall)**

Performance evaluations go two ways, and it is important to let partners also rank Edmonton's effectiveness as a partner in meeting goals, responsiveness to communication and billing needs, and if there is still alignment around the shared mission and vision of the partnership/relationship.

### **Develop a means to quantify return on investment (ROI)**

The partnership team should work with staff managing specific partnerships to develop appropriate performance measures; however, it needs be the manager of the partnership that measures the outcomes and provides the partnership team with scheduled updates of outcome results. Agreements must stipulate a measuring period which is reasonable to determine if the partnership will continue or not (based on data and results) as opposed to opinion.

ROI is often challenging because the return is not always tangible. To accurately identify the return on investment it is necessary to identify each form of value received from the partnership. *Powering the Future* identifies that tangible value from a partnership may include "funding, staff, assets, technology, and information. Intangible value from the partnership may include knowledge, access, relationships, political support, and in-kind contributions."<sup>15</sup>

**Example:** When dealing with tangible value a particular partnership is providing, Edmonton may compare the dollar value it would take to accomplish the partnership on its own versus the cost it assumes in the partnership, comparing the costs for the same results. For example if a department partners with a nonprofit with existing assets, staff, and resources the department does not have, staff would need to evaluate cost of paying for these tangible resources alone versus the cost to partner. Intangible assets must also be considered in the return on investment. Placing a monetary value on knowledge, access, relationships, or political support a partner provides would be an estimate at best, but is a return on investment.

**Example:** *Testing Tradition: Assessing the Added Value of Public-Private Partnerships*, a 2002 White Paper published by the National Council for Public-Private Partnerships proposes a Value for Money (VfM) analysis to determine the return on a partnership. In essence, this approach compares the cost of the partnership to the cost of a single-entity delivery of a particular service. The white paper claims four key components are needed to properly complete a VfM analysis.

1. Public Sector comparator (PSC) use, to access the public sector cost of traditional delivery and compare it to a {joint venture or contract based partnership}
2. Full Life-Cycle (FLC) cost and revenue analysis for each option
3. Determination of most appropriate risk sharing scenario
4. Assessment of public opinion and maintenance of transparency<sup>16</sup>

For some partnerships a tangible value comparison will be enough to identify a return on investment to justify creating partnership. For other partnerships a consideration of the intangibles and whether or not the purpose of the partnership can be achieved without the intangible value of the partnership, would inform the ROI analysis of value in a partnership.

### Follow the tips and avoid the traps to measuring performance

Many common pitfalls to performance measurement exist, such as the tendency for organizations to measure what is easily available to measure instead of measuring what is actually needed to determine if the “why” is being achieved.

Example: *Powering the Future* identifies both tips and traps for measuring performance in the table below.<sup>17</sup>

**TABLE 4-1**  
**TIPS AND TRAPS FOR MEASURING PERFORMANCE**

TIPS	TRAPS
Focus on results that matter.	Measure what is available.
Keep it simple.	Dazzle them with statistics.
Focus on the critical few.	Try to measure everything.
Link performance measurement to decisions.	View performance measurement as an end, not a means.
Success is not instant.	Change course at will.
Ask customers what they want.	This is a job for professionals.
Report results widely.	Use performance measures to blame people.
Data are a necessary expense.	Expect measures to report on themselves.
Don't give up.	Inaction: It is easy to avoid the hard work of focusing on results.

## 4. Develop a robust and relatable communications strategy.

As John Powell, the English composer and conductor states, “communication works for those who work at it.”<sup>18</sup> Being able to communicate successfully with partners allows for more efficient decision making, increases opportunities for innovation, and creates an avenue for the public to be involved. Internal communication is equally important to ensure that all partnership applications receive the same level of assistance, and that high-performance partnerships are strategically developed.

### Leading Examples:

- Videos
- Annual reports
- Highly functional and visually appealing websites
- Awards and recognition programs
- Monthly connection sessions
- Program enrollment open to all city staff
- Newsletters



## Action Steps For Developing a Robust and Relatable Communications Strategy

### Name the office

Naming the partnership office will be an important step in creating an identity. A logo or abbreviation may also help with name recognition. The name should represent the vision of the office and be simple to remember.

**Example:** [Fairfax County, VA](#)



### **Host regular in-person meetings with stakeholders**

Hosting in person meetings allows for building relationships, sharing information, generating feedback, and bonding. In-person meetings allow the team leader to keep team members focused on their mission and goals.

**Example:** The [Denver Office of Strategic Partnerships](#) hosts Connection Sessions twice a month for anyone interested in learning about the office or getting feedback on a proposal.

**Example:** The Fairfax County OP<sup>3</sup> has weekly “lunch and learn” sessions for staff and others to share information and leading examples.

### **Develop a user-friendly and visually appealing web presence**

Most people use the internet to research subject matters of interest and to gain knowledge. Having a website that is user-friendly and is visually appealing will allow for a wide array of users to communicate ideas, solutions to problems, and for an organization to market its programs.

**Example:** The Fairfax County OP<sup>3</sup> website is designed as a single point of reference for current and future partners, as well as County staff. They display their partner criteria, toolkits, news stories, staff information, volunteer information, and other “all-things-partnership” material.

### **Communicate results and highlight success stories**

Newsletters and annual reports are great avenues to share information about stakeholders’ related programs, partnership opportunities, and achievements.

- [Fairfax County OP<sup>3</sup> Newsletter](#) ([www.fairfaxcountypartnerships.org/news/newsletters.html](http://www.fairfaxcountypartnerships.org/news/newsletters.html))
- Annual Reports
- Reports to staff and elected representatives

### **Create recognition opportunities**

Recognition of a job well done is of utmost importance in having high morale with team members and can be an outstanding way to promote organizations’ successful programs and recruit more partners.

**Example:** One Church One Child of Nevada hosted Celebrationfest 2009.<sup>18</sup>

**Example:** Fairfax County OP<sup>3</sup> hosts an annual partnership awards gala to bring county staff and partners together to recognize great partnerships and facilitate connections.

### **Take advantage of social media**

Using social media is a cost effective tool for sharing information and creating two-way communication. Social media provides a mechanism for continued updating and educating both internal and external stakeholders.

**Example:** Boston New Urban Mechanics Blog **Girls MAKE the City** ([www.newurbanmechanics.org/2013/09/18/girls-make-the-city/](http://www.newurbanmechanics.org/2013/09/18/girls-make-the-city/))

### **Connect with staff**

If applicable, open program enrollment to staff. This will help increase awareness while providing a benefit to staff.

**Example:** The [Denver Office of Strategic Partnerships](#) allows staff to receive free financial counseling through their Financial Empowerment Centers. Staff appreciate the benefit, and are better able to explain the program to their stakeholders.

# Case studies

We began our search by identifying cities in the United States (the geographic area requested by Community Services staff) with a similar population to that of Edmonton, or within a range of where Edmonton will be given current growth trends. We soon discovered there are not enough cities in that range for good data comparison, and we expanded our search to include more local governments (including counties) with a wider population range. With approximately 165 cities and counties on the list with a population between 600,000 and 1.18 million, we then explored each community to identify those with partnership programs. From that list, we identified a short list of local governments for deeper research based on their fit with Edmonton's efforts: a coordinated and comprehensive partnership program with community-wide reach, driven by data, and with a dedicated team responsible for results.

Three communities stand out based on how they began and where we believe Edmonton is headed.

Our team interviewed staff, reviewed their materials, metrics, and toolkits, and assessed their programs for a match with Edmonton's goals.

- Fairfax County, Virginia's Office of Public Private Partnerships (OP<sup>3</sup>)
- Denver, Colorado's Office of Strategic Partnerships
- Boston, Massachusetts' Mayor's Office of New Urban Mechanics

Comparatively few local governments are successfully charting the waters Edmonton is entering. Of comparably sized cities or counties, there are only a handful that have a comprehensive and coordinated partnerships program. According to one of the communities interviewed, they are aware of fewer than 20 such coordinated programs in the U.S. in total, at the local level, and few are in a sustainable state: the roster is in flux with offices appearing and disappearing with staff and policy changes.

# CASE STUDY:

## Denver, Colorado

## Office of Strategic Partnerships

### CREATED IN 2004 TO SERVE AS A BRIDGE BETWEEN THE CITY OF DENVER AND THE NONPROFIT SECTOR.

#### Basic stats

**Year Established:** 2004

**# of Staff:** 3.5 FTE; 1-3 PT fellows or interns at any given time

**City Population:** 634,000

#### Why are they a good model for Edmonton?

Denver's Office of Strategic Partnerships is an exceptional model for a professional, passionate, and well-coordinated approach to developing mutually beneficial partnerships. Their team is highly engaged in the mission of the office, and strategic planning is the foundation of their operations. DOSP is overseen by a 15-member Commission appointed by the Mayor of Denver. Members of this oversight body serve for 2-year terms, and meet regularly to provide strategic direction and oversight of DOSP and its work.

#### Team structure

- Overarching strategic guidance is provided by a mayor-appointed commission.
- Director oversees the direction and management of the office.
- One full time contract manager handles contracting processes and provides some administrative support.
- One full time program manager for the financial empowerment centers grant.
- Department funds half the salary for a full-time, shared project coordinator for our collaborative Denver shared spaces.
- Additional staffing capacity is volunteer or stipend based and each focuses on a specific program area.
- Share some administrative support through the agency under which we are housed.

#### CONTACT

Miriam Peña, Director  
201 West Colfax, Dept. 701  
Denver, CO 80202  
720.913.8852/Office  
miriam.penagarcia@Denvergov.org

---

“By working collectively, the public and nonprofit sectors can be more efficient and effective in strengthening the Denver community.”

—Nanette L. Mosby

*Contract and Administrative Support Coordinator*

## Creating the Office of Strategic Partnerships

The Denver Office of Strategic Partnerships (DOSP) was started in 2004 by then-Mayor John Hickenlooper and founding director Mike Roque to serve as an intentional bridge between the City of Denver and the nonprofit sector. While the Office has offered a number of different programs since its founding, the core belief has remained intact - by working collectively, the public and nonprofit sectors can be more efficient and effective in strengthening Denver's communities.

DOSP was initially housed out of the Mayor's office, and has since been moved several times to different areas, including the Office of Economic Development and Denver Human Services. The office now resides within the structure of the Agency of Human Rights and Community Partnerships.

A refinement of their strategic plan in 2009 initiated the current incarnation of the office. Their work now focuses on three main goals:

1. Improve the environment, processes, and culture through which the city government and nonprofits intersect.
2. Ensure nonprofit involvement in shaping and achieving the City priorities.
3. Mobilize and leverage resources to support nonprofits and City agencies in addressing community needs.

## Measuring strategic value and return on investment

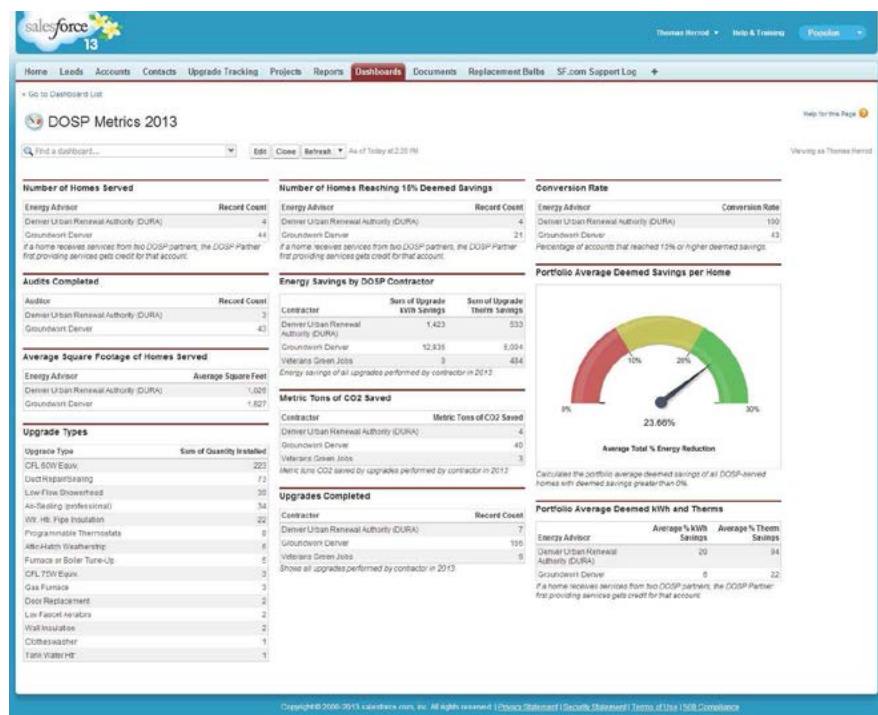
While they do not have a formal ranking system for incoming proposals, DOSP conducts evaluations based on the priorities outlined in their strategic framework. The DOSP 2013–2015 Strategic Plan is a powerful, yet concise document. It outlines clearly the vision, mission, goals, and strategies on a single, graphical page. This document is used as a guide for all programs, and serves as a touch-point for most conversations.

Connection Sessions are held twice a month to allow interested parties to learn more about what

the office has to offer, and get initial feedback on their idea. This provides a valuable opportunity for staff to connect with new organizations, hear ideas, and help craft new proposals from their infancy.

DOSP is in the process of developing more uniform standards related to performance measurement, and several programs have begun to develop more structured tools. For example:

- Partners in the Denver Financial Empowerment Initiative are required to fill out Memorandums of Understanding (MOU) which align each partner to specific outcomes that they are later measured against. The office is working to develop basic MOU documents that could be used in other programs.
- The Denver Shared Spaces Initiative, which facilitates the creation of multi-tenant nonprofit centers, has a Partnership Readiness Assessment, which is used to guide initial conversations about new proposals. The questions on the assessment help to ensure that each Shared Spaces partnership "starts off at the right time with the right people around the table."
- Performance metrics for the administration of the Xcel Energy Assistance Funds are tracked using Salesforce. This software program allows them to track the details of individual projects, and see comprehensive reports and dashboards to track performance.



## Spotlight on leading practices

### 1. Strategic planning and change management

DOSP has proven itself to be flexible in the face of change, while still retaining its central tenet- by working collectively, the public and nonprofit sectors can be more efficient and effective in strengthening Denver's communities. Since the establishment of the office in 2004, they have been housed in several offices and faced changes in the political landscape, yet they continue to grow. Strategic planning is one of the methodologies they have used to retain focus. As stated above, the DOSP 2013-2015 Strategic Plan is a powerful, yet concise document. Employees of the office are exceedingly familiar with the plan and use it to guide conversations about new opportunities for partnership, as well as measure the contributions of current programs.

### 2. Communication

Using the correct mix of in-person and electronic communication tools can be a difficult balance for any

organization. DOSP provides excellent examples of both. The material on the website is clearly organized and explained, and presented in a visually appealing way. Staff uses a variety of electronic communication tools including:

- Monthly newsletter which includes events, announcements, and job postings for partner organizations
- Social media sites which are regularly updated
- Annual reports
- Logos for larger programs to increase recognition
- Concise highlights for success stories or announcements on main webpage

DOSP also builds capacity through a strong focus on in-person meetings and trainings. While electronic tools are quickly becoming the backbone of modern communication, the personal touch can fall by the wayside. Investments in building connections repay themselves in the long-term with stronger, more robust partnerships.

- Bi-monthly Connection Sessions to meet one-on-one with DOSP staff. Half-hour slots are available to anyone associated with a nonprofit or City agency.

### What's Happening...



#### **Collaboratives: Financial Empowerment Centers**

**Take control of your debt.** Free 1-on-1 counseling is available at the Denver Financial Empowerment Centers.

A partnership between the Denver Office of Strategic Partnerships, empowered, numerous city agencies and nonprofit partners, we are committed to working together for the financial health of our community. [Learn more...](#)



- 1
- 2
- 3
- 4
- 5



There is no set agenda for these sessions. They are designed to allow for open conversation about new ideas or programs, or for other organizations to inform DOSP about resources they can offer.

- Trainings on various topics. Example;
  - **Effectively Working with Local Government**  
*Looking to strengthen your partnerships with local government agencies in Denver? Want to initiate new collaborations? Then join the Denver Office of Strategic Partnerships for this revealing, interactive training. This workshop provides insight and practical tips for nonprofits who want to learn more about working with the City of Denver.*
- The Denver Shared Spaced Initiative hosts quarterly meetings to openly discuss the strengths and weaknesses of the program and brainstorm ideas for improvement.
- Social events and celebrations to recognize the accomplishments of the office and its partners. Example:
  - **Shared Space Annual Harvest Festival**  
*Denver Shared Spaces invites you to the Shared Space Harvest Fest, a family-focused*

*celebration highlighting collaboration and community development through shared spaces. Held in and around Curtis Park Nonprofit Center, this event will feature kid-friendly activities like face painting and balloon animals, treats and drinks for “kids” of all ages, and a local business and resource fair. A great way for neighbors, community members, businesses and service providers to come together for fall fun and community building! We hope to see you there!*

### 3. Staff engagement

People are at the heart of all functions of local government. Without knowledgeable, engaged, passionate employees, it is impossible to provide the exceptional quality that Edmonton strives for. The entire team of the DOSP gathered for the phone interview conducted for this case study, and it was clear that they are the central reason the office has been successful. Each are knowledgeable about their individual programs and responsibilities, but can also speak to the overarching importance of the office in the City’s service delivery strategy.

# CASE STUDY:

## Fairfax County, Virginia

### Office of Public Private Partnerships

#### OP<sup>3</sup>: EXPONENTIALLY INCREASING THE VALUE OF PUBLIC PRIVATE PARTNERSHIPS

##### Basic stats

**Year Established:** 2008

**# of Staff:** 9 FTE

**County Population:** 1,119,000

##### Why are they a good model for Edmonton?

The Fairfax County OP<sup>3</sup> is noteworthy for three primary reasons. First, the county serves a population base within a similar range to where Edmonton is headed at its current growth rate. Second, the circumstances which led to the creation of the office are similar: the county had existing partnerships and was at a period of change, and questioned what direction they should go with partnerships in the future. Third, the way they formed their office is a process we recommend Edmonton consider—creating a new office by bringing staff together into a central office, maintaining and building relationships with partnership staff in agencies/branches, and following an iterative process of continuous improvement.

##### Team structure

- OP<sup>3</sup> operates [with a staff of nine](#), including an executive director and administrative assistant, two partnership developers, a volunteer resources developer, grants research and training center coordinator, business and technology manager, marketing and communications manager, and a corporate social responsibility manager.
- Early on in the creation of the new structure, a strategic decision was made to keep the central office small, and develop relationships with partnership managers in the county offices. They considered consolidating everyone into a central office, but in the end decided it would be better to have a central coordinator and receiver of information, but to maintain issue-area experts with relationships in the field. This is a critical decision point, and one that Edmonton should consider at this early stage.
- In true partnership form, the office does not directly manage volunteers, but works through a partnership with the group [Volunteer Fairfax](#). This nonprofit group receives funding annually from the county, but they have their own mission and staff.

##### CONTACT

Patti Stevens, Executive Director  
12000 Government Center Parkway, Suite 432  
Fairfax, VA 22035  
(703) 324-5171/Office  
Patricia.Stevens@fairfaxcounty.gov

“OP<sup>3</sup> fosters public-private partnerships to stimulate positive change in the community and encourage civic engagement. The office brings together representatives and leverages resources from public and private sectors to address community issues that affect the quality of life in Fairfax County.”

—Patti Stevens

## Creating the Office of Public Private Partnerships

Fairfax County, Virginia's Office of Public Private Partnerships was created in 2008 by reconfiguring an existing county community action agency, originally focused on medical care for children in poverty and low income communities, having grown to include computer learning centers. A county task force was created by the manager to review what was working with existing partnerships and what should be done differently. The task force decided the county role should be on convening partnerships, being a broker of information about partnership opportunities, and ensuring existing county partnerships were known and executed efficiently. Key to the result of their work was deciding that the county would not run partnerships, but would be the broker and facilitator of partnership dialogues that would then operate under the agency or department that had the best mission or fit with the partnership goal. Partnerships are catalyzed by OP<sup>3</sup>, but the agreement is between other partners (such as a county agency, and one or more private or non-profit organizations).

## Measuring return on investment

The county noted that properly calculating return on investment is both important, and cumbersome. Early on in the process, they contracted with two MBA students to create measures and a tool for determining ROI. The county acknowledged that while it was important to do, and the county processed the information for a few years, it was too challenging and time consuming to continue collecting at the central level. Also, enough useful data was collected to help determine what was truly important in calculating return on investment and not mere accounting. They continue to encourage agencies to embed a partnership measure to track ROI at the partner level.

Some measures explored and in use include:

- Number of contacts made
- Number of contacts connected to a partnership opportunity
- Number of partnerships leveraged annually

In addition, they set a goal for the partnerships office that the value of resources garnered for the county should be a minimum of 110 percent of the cost of the office.

## Spotlight on leading practices

What stands out most for the team about what's going on in OP<sup>3</sup> includes the criteria they have developed for assessing partnership requests and opportunities, the toolkits and resources they have discovered or developed for the process, and their communications, outreach, and engagement.

1. **Partnership criteria.** Three questions help screen applicants and find the best match or opportunity for creating new partnerships for the county. When the office was created they found that trying to do everything for everyone wasn't taking them in the right direction. Creating criteria has helped them manage requests, process them more efficiently, and most importantly connect the right groups together to generate the best outcomes for the county. From their website:

- a. *Does it address a Fairfax County priority or help meet an identified community need?*
- b. *Are there shared interests and mutual benefits for public and private sector partners?*
- c. *Is it likely to leverage new resources, expand capacity, or reduce costs?*

*If the answer is yes for these three criteria, OP<sup>3</sup> staff facilitates planning discussions to determine the scope, roles, outcomes, and most importantly, calculate the projected Return on Investment (ROI). The partnership agreement is then signed by all partners. Once the initiative is underway, contributions of all partner organizations are recognized and promoted.<sup>20</sup>*

2. **Models.** Using a model process and rational for developing sustainable partnerships has helped unify the way OP<sup>3</sup> gets new partnerships off the ground. These resources help explain the rationale for partnering, illustrate a model for creating partnerships from scope to sustainability, and identify obstacles. Additionally, these toolkits identify and define—in a partnership context—key principles such as equity, transparency, and leadership, resource mapping, governance and accountability, and telling the story. These are good models on which to base programs, and Edmonton may decide to follow them as is, or customize and create unique toolkits based on these resources and others. What is clear though is that these are working for OP<sup>3</sup>. These resources are included in the supplemental research material included with this report, and are also available from the [OP<sup>3</sup> website](#).

3. **Communication and conflict resolution.** Early on in the process, the team was focused on researching what the world was doing around partnerships. The team was downsized after consolidation, and the remaining staff formed a learning group. They met weekly for lunch with the assignment of having found and reviewed an article or resource that would educate the other group members about leaders in the world of partnerships and what others were doing. This research helped inform the way forward for the county.

One challenge they identified was that, as a county, they had eight different chambers of commerce that were not always collaborative. To facilitate cross-county collaboration, OP<sup>3</sup> created a

chamber communicators group, and continues to bring them together over topics of mutual interest, such as emergency preparedness, environmental initiatives, and the arts. The chambers are more freely sharing information, getting along better, and facilitating new connections through sharing their latest partnerships.

In their second year, OP<sup>3</sup> started an awards event that to recognize outstanding and new partners. Typically around 400 people attend an event that has transcended awarding great programming, and has become a catalyst for creating new interactions and connections as award-winning partners meet each other and create new relationships that lead to new partnerships.

# CASE STUDY:

## Boston, Massachusetts

## Mayor's Office of New Urban Mechanics

### MONUM: PILOTS EXPERIMENTS THAT OFFER THE POTENTIAL TO IMPROVE RADICALLY THE QUALITY OF CITY SERVICES<sup>21</sup>

#### Basic stats

**Year Established:** 2010

**# of Staff:** 5 FTE

**City Population:** 636,500

#### Why are they a good model for Edmonton?

Boston's MONUM offers three particular areas worthy of Edmonton's attention in the creation of a centralized partnership team. First, MONUM is based on a specific model that clearly defines purpose, and in turn, drives the office's efforts in selecting partners and testing ideas. Second, MONUM offers examples of how to risk experimentation and effectively utilize technology to achieve their goals.

#### Team structure

- The office was established by the mayor in 2010, via the new urban mechanics approach, to serve the city's civic innovation group.
- Currently there are 5 full-time staff dedicated to the office.
- To create the office, current staff members were restructured from other departments within the organization.
- MONUM is small and operates on a small budget, which mandates them to focus on select projects, be selective and demands only partnering with like-minded organizations. MONUM claims this small and fast model is essential to being creative and innovative.
- The initial goals of the office were to address issues that were high on the mayor's and community members to-do lists: education, neighborhoods, and citizen engagement.

#### CONTACT

Chris Osgood, Co-Chair  
(617) 635-3518/Office  
chris.osgood@boston.gov

"We try never to be an office that says no to exploring a new idea. Our intent is to be the office of 'yes.'"

—Chris Osgood

## Creating the Office of New Urban Mechanics

Boston's MONUM was created in 2010 at the direction of the Mayor and based on a model called New Urban Mechanics (reflected in the name of the office). New Urban Mechanics is defined as "an approach to civic innovation focused on delivering transformative City services to residents".<sup>22</sup> This specific model is designed to enable Boston flexibility to experiment, the ability to re-invent public-private partnerships and to create change. Boston is one of two municipalities recognized for having a specific office of new urban mechanics, along with Philadelphia, Pennsylvania. The Mayor of Philadelphia, Michael A. Nutter described the concept as "a civic innovation tool for urban transformation".<sup>23</sup>

MONUM was created with existing staff from other departments in the City through restructuring. The office was originally tasked to focus on building partnerships to influence education, neighborhoods, and citizen engagement. Through the Mayor's Office of New Urban Mechanics, the City is partnering with residents and businesses to pilot original approaches to civic innovation. For the best ideas, the City is able to offer assistance in funding, managing a selected project, and connecting people with other resources or partners more suited for a particular idea.

### Spotlight on leading practices

Although, the ICMA project team is not necessarily recommending Edmonton adopt the New Urban Mechanics model and create an Edmonton MONUM, to achieve Edmonton's goal to enrich livability through partnerships, having a clearly defined purpose, narrowing partnership criteria to the purpose, and being willing to risk experimentation and utilize technology will benefit an Edmonton Partnership Team.

1. **Purpose-driven model.** As noted earlier, Boston, like Philadelphia, functions through the New Urbanism Mechanics model, which solicits citizen engagement of ideas to improve or solve clearly defined issue areas, select certain ideas and test these ideas through experimentation. Boston has defined the current issue areas they are seeking ideas for as participatory urbanism, clicks and bricks and education. According to [newurbanism.org](http://newurbanism.org), participatory urbanism focuses on civic engagement through technology "to deliver services that are more personal and citizen-driven."<sup>24</sup> Clicks and bricks focuses on "technology infra-

structure and sustainable design [to] link how a City is built with how it is managed and experienced." Clicks and bricks ideas projects are those that bring a wide range of talents in various fields to create innovative designs and infrastructure. Education seeks to utilize "new tools and technology to facilitate communication between educators, students, and parents and to deploy new programs that could improve offerings both inside and outside schools."

2. **Partnership criteria:** MONUM evaluates incoming requests to partner or ideas to evaluate with three specific questions:
  - Does the project meet a high priority of the City?
  - Are the partners inside and outside City Hall aligned to do it?
  - Do we have the resources to support the project?

If the answer is yes to all three questions, the idea is sent to one of the four different labs for further evaluation. Each lab is assigned an area of importance (I.e. education, citizen engagement, street scape and neighborhoods). The labs are led by one of the MONUM team members.

3. **Experimentation and technology.** MONUM utilizes the nationally-oriented [New Urban Mechanics website](#) to solicit and spur ideas from the public. These ideas are selected via the criteria above for the purpose of identifying projects that serve the purpose of addressing focus areas. MONUM then tests these ideas through their labs which the office staff oversee. MONUM utilizes a blog through the website as well to share the projects and ideas that are in the labs and being implemented. Co-Chair of MONUM Chris Osgood stresses that the office is focused on saying "yes" to new ideas and approaches as opposed to saying "no". MONUM recognizes the need to accept the risk that not all projects will succeed in order to identify those that will be transformational. MONUM staff, although small in number, seeks to spend as much time as possible meeting and engaging with people. Also, the team finds ways to maintain focus on their purpose and results. Some of the ways they do this include, but are not limited to:
  - Weekly meetings with other MONUM member cities,
  - Press releases,
  - Award events,
  - Weekly team meetings, and
  - Quarterly board meetings.

# References

1. Camille Cates Barnett, Christine Becker, Peter Goldberg, Sandra J. Hale, Sara E. Melendez, and Michael Rogers. *Powering the Future: High-Performance Partnerships*. Rep. Washington D.C.: National Academy of Public Administration, 2003, 12.
2. Ron Carlee, “Local Government 101,” Presentation.
3. *Powering the Future*, 12.
4. “The Way We Live,” [http://www.edmonton.ca/city\\_government/city\\_vision\\_and\\_strategic\\_plan/the-way-we-live.aspx](http://www.edmonton.ca/city_government/city_vision_and_strategic_plan/the-way-we-live.aspx), 7.
5. *Powering the Future*, 15.
6. Frans Johansson, *The Medici Effect* (Boston: Harvard Business School Press, 2004), 16-20.
7. Dan Pontefract, “The Organization Needs to Ask Itself Tough Questions to Survive,” [www.danpontefract.com/the-organization-needs-to-ask-itself-tough-questions-to-survive](http://www.danpontefract.com/the-organization-needs-to-ask-itself-tough-questions-to-survive), May 5, 2011.
8. “How great leaders inspire action,” [www.ted.com/talks/simon\\_sinek\\_how\\_great\\_leaders\\_inspire\\_action](http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action).
9. *Powering the Future*, 12.
10. Richard Norment. “Partnerships That Work for Local Governments.” *Alliance for Innovation Ideas Quarterly Newsletter*, October 2011.
11. Tim Brown, *Change by Design*, (New York: HarperCollins, 2009), 227, and “Tim Brown on Change by Design,” [icma.org/leadingideas](http://icma.org/leadingideas) (Tim Brown interview).
12. “Senior Executive Institute,” [www.coopercenter.org/leadership](http://www.coopercenter.org/leadership).
13. Daniel Pink, “The Puzzle of Motivation,” [www.ted.com/talks/dan\\_pink\\_on\\_motivation](http://www.ted.com/talks/dan_pink_on_motivation); and Jessica Gross, “What motivates us at work? 7 fascinating studies that give insights,” April 10, 2013, [blog.ted.com/2013/04/10/what-motivates-us-at-work-7-fascinating-studies-that-give-insights](http://blog.ted.com/2013/04/10/what-motivates-us-at-work-7-fascinating-studies-that-give-insights).
14. *Powering the Future*, 15.
15. *Ibid.*, 16.
16. Kimberly S. Meyer, *Testing Tradition: Assessing the Added Value of Public-Private Partnerships*, the National Council for Public-Private Partnerships, 8–11.
17. *Powering the Future*, 67.
18. “John Powell,” <http://www.brainyquote.com/quotes/quotes/j/johnpowell163805.html>.
19. Kathy Carter, “Partnerships that Work for Local Governments,” *The Idea Quarterly Report*, Summer, 2009.
20. “Partnership Criteria,” [www.fairfaxcountypartnerships.org/partnerships/criteria.html](http://www.fairfaxcountypartnerships.org/partnerships/criteria.html).
21. [www.newurbanmechanics.org/boston](http://www.newurbanmechanics.org/boston)
22. “What is New Urban Mechanics?” [www.newurbanmechanics.org/about-2](http://www.newurbanmechanics.org/about-2).
23. “Philly Establishes New Office for Civic Innovation,” December 13, 2012, <http://www.planetizen.com/node/59701>.
24. “Boston,” <http://www.newurbanmechanics.org/boston>.

# Contact information

## About the team:

Leadership ICMA is a two-year ICMA University program designed to cultivate key competencies needed for successful leadership at all levels of local government management. The curriculum involves classwork on leadership philosophy, personal integrity, high-performance organization management models, team-building, strategic planning, and project management taught by experts in the field. The program culminates in a team-based capstone project for a local government with a real-world challenge.

### Mike Bennett

Primary Team Contact,  
Assessment & Presentation Management



Mike is currently the Administrative Services Director for the City of Hickory, North Carolina. He oversees the internal services of the city, including human resources, finance, information technology, and risk management. Prior to this role, Mike served in the City Manager's Office as Assistant to the City Manager and also directed the city's regional transportation department. Mike received his Master of Public Administration from Brigham Young University and his Bachelor of Science in Public Relations from Utah State University. Mike and his wife are the proud parents of three children.

*Administrative Services Director—Hickory, NC*  
(828) 323-7471 | [mbennett@hickorync.gov](mailto:mbennett@hickorync.gov)

### Tony Cain

Research and Portfolio Development



Tony Cain is the Assistant City Manager/Chief of Public Safety for the City of Hillsboro, Texas. Tony is responsible for the departments of Police, Fire/Rescue, Animal Services, Code Enforcement, Court, and Recreation. Tony has a Master Degree in Leadership from Bellevue University and a Bachelor of Science in Criminal Justice from Southwestern Adventist University. He has two daughters.

*Assistant City Manager/Chief of Public Safety—Hillsboro, TX*  
(254) 337-0320 | [tcain@hillsborotx.org](mailto:tcain@hillsborotx.org)

### Rob Carty

Task Management,  
Research and Portfolio Development



Rob Carty is ICMA's Director of Career Services, overseeing a portfolio of products and programs that engage and aid professionals and local government staff in entering and advancing in the field of professional management. Rob leads ICMA's efforts to attract a new generation to careers in local government. Rob has worked in local and federal government and the private sector both in the U.S. and internationally. He holds a Master of Business Administration degree from the Smith School of Business, University of Maryland, College Park, and a Bachelor of Arts degree from the University of San Diego, California, and is a member of ICMA. He and his wife have two children.

*Director of Career Services—ICMA*  
(202) 962-3560 | [rcarty@icma.org](mailto:rcarty@icma.org)

### Lena Stevens

Assessment & Presentation Management



Lena became the City of Decatur's first Resource Conservation Coordinator in September, 2009, and has been with the City since 2007. She serves as the primary coordinator for environmental initiatives and policies, and staffs the Environmental Sustainability Advisory Board. Lena is responsible for working across departments and with outside organizations on a number of community issues such as urban agriculture, speed limit policies, fundraising, and energy efficiency. Lena received her Bachelor degree in Environmental Economics and Policy from Michigan State University and her Master of Public Affairs from Indiana University's School of Public and Environmental Affairs.

*Resource Conservation Coordinator—Decatur, GA*  
(678) 553-6577 | [lena.stevens@decaturga.com](mailto:lena.stevens@decaturga.com)



# APPENDICES

<b>Appendix A:</b> <b>Staff focus group handout .....</b>	<b>32</b>
<b>Appendix B:</b> <b>Interview with Denver Office of Strategic Partnerships .....</b>	<b>33</b>
<b>Appendix C:</b> <b>Interview with Fairfax County Office of Public Private Partnerships.....</b>	<b>35</b>
<b>Appendix D:</b> <b>Interview with Boston Office of New Urban Mechanics.....</b>	<b>36</b>
<b>Appendix E:</b> <b>List of digital resources provided to community services staff for additional research.....</b>	<b>38</b>
<b>Appendix F:</b> <b>Partner survey tool.....</b>	<b>39</b>

## Appendix A:

# Staff focus group handout

CITY OF EDMONTON

Community Services Partnership Framework Project  
Enriching livability through partnerships



## Instructions

- Select a coach from each team to lead the group through the discussion and keep things on track.
- Select someone to take notes and a spokesperson to present a summary of your team's discussion.
- Use the time as you see fit. Work back and forth between questions as the conversation flows.

## TIPS!!

- Think about what you are choosing to create.
- Make sure all voices are heard.
- Periodically conduct a "tension check." Ask yourself about the tension that exists between your ideal vision and the current reality, and estimate a probability of success. Too much or too little tension can result in low momentum for the action plan.

### STEP 1:

Outline the team's current experience in working with partners.

- Why do you engage with partners?
- What value do partners bring to your work?
- Types of partners engaged?
- How would you categorize your relationship (alliance, joint venture, sponsorship, etc.)?
- Lessons learned?

### STEP 2:

Identify ideal future for how Edmonton develops and manages partnerships

- Five years from now, what would you like our relationship with partners to look like?
- How do we get something better than where we're at today?
- What would be the ideal future state in this regard?
- What would we be most proud of?
- Who's leading this work?
- What resources are being brought to this work?

### STEP 3:

Identify current reality

- What progress have we already made towards this outcome?
- What's working in our favor toward towards outcome?
- What's not working in our favor?
- What challenges do you face in working with partners?
- Why do you feel you face these challenges?
- "If only" exercise (if only X, they Y)

### STEP 4:

Action steps

- Name and record obvious and natural action steps to take.
- What actions are needed to get us to that vision?
- What changes are needed?
- What should our more immediate priorities be?
- What resources can the team members contribute towards these action steps (if any)?

## Appendix B:

# Highlights from interview with Denver Office of Strategic Partnerships

## Establishing the office:

### ***Why was the office established? What is the primary mission?***

Part of a burgeoning national movement, DOSP was started in 2004 by then-Mayor John Hickenlooper and founding director Mike Roque to serve as an intentional bridge between the City of Denver and the non-profit sector. While the Office has offered a number of different programs since its founding, the core belief that by working collectively, the public and nonprofit sectors can be more efficient and effective in strengthening Denver's communities has remained.

We were initially housed out of the Mayor's office, and have since been moved to other homes within the City, including the Office of Economic Development and Denver Human Services. The office now resides within the structure of the Agency of Human Rights and Community Partnerships.

The current incarnation of DOSP's work began in early 2009, when the office went through a strategic plan refinement. The work focused specifically on building individual skills and tools in nonprofit and City agency staff to encourage creation of cross-sector partnerships, continuing and expanding the active facilitation of City-nonprofit collaborative efforts, and helping to connect the two sectors to leverage government grant and real estate resources in new ways.

### ***Did you hire new staff or reorganize existing staff to create the office?***

Initial hiring was a reshuffle of existing staff. Over the past 10 years, we have ranged in size from a staff of 1 to a staff of 8 full time employees (FTE).

You can get a lot done with pieces of people's job descriptions, provided there are clear expectations outlined. They take off when the collaborative efforts have a full time dedicated staff. Initial director has a lot of community expertise. Next director was hired by Commission.

### ***What would you have done differently when establishing the office?***

We were not officially written into the City charter until two years ago. If we were to do it over again, we would have gone through that process with City Council much sooner in order to ensure a higher level of sustainability and stability within City government.

### ***What were the primary challenges you faced in establishing the office?***

Having the mayor's buy in for the creation helped us to get a foothold, but we faced a challenge in using that mayoral endorsement as a platform for actually making changes in how the City relates to and partners with the nonprofit sector. There are a range of power structures and dynamics to navigate that aren't always related directly to the official hierarchy.

## General operations:

### ***How do you work with other divisions or departments within the city to either fulfill their strategic needs, yours, or the county's in general?***

We do the vast majority of our work in partnership with other City/County agencies. Our goal is to consistently demonstrate reciprocity through these partnerships—assisting our partners in meeting their needs and ensuring that all of the work is in alignment with the strategic framework the mayor has laid out for the City.

This work is sometimes formalized through memoranda of understanding that help outline expectations and responsibilities. We are exploring partnerships with other agencies that will help financially support the Financial Empowerment Centers once the pilot grant is expended.

We also provide trainings that help City agency employees develop skills in working more effectively with nonprofits as well as a mirror training offered to nonprofit professionals to help them work with the City.

***How many official partnerships does your office manage annually?***

We have 2–3 large partnerships or collaboratives that we engage heavily with in any given year, as well as a number of other collaborative efforts that we provide technical support to.

***Do you measure revenues generated for program funding from external sources?***

Depends—we have not done this consistently with every partnership, but are working to capture these numbers.

***How do you evaluate incoming requests for partnership? Ranking system?***

We do not have a formal ranking system, but do evaluate new opportunities against the priorities in our strategic framework.

***What sort of forms or structures have you implemented that you found particularly helpful? Would you be willing to share any of these documents?***

We have found our strategic framework and business plan to be incredibly useful in guiding our programming, evaluating our impact and providing a platform for communicating our success. We would absolutely be willing to share these documents.

***How do you balance incoming requests with proactively identifying new partnerships?***

Connection Sessions every month. Open to public. Make connections to city agencies, other non-profits, etc. Tell them how to best position themselves to make a pitch. More informal. Gives new folks information about how to work with city. Sessions allow staff to evaluate groups. Nor formal criteria for evaluating new. Someone sees a need or they get feedback. Use strategic plan to see if there is alignment.

## Appendix C:

# Highlights from interview with Fairfax County Office of Public Private Partnerships

## Establishing the office:

### ***Did you use any models from other communities when establishing office?***

Yes—Denver’s Office of Strategic Partnerships and then Boston, The Mayor’s Office of New Urban Mechanics.

### ***How was the office established? Was it a phased approach? Driven by elected officials? Management? Etc.***

We had a weekly “lunch and learn” where staff would bring in an article and discuss (with the eight staff that were retained after forming this group). We now have 35 people coming to these partnership exchange events. It was management driven after we had considered spinning-off our earlier partnerships (that were acting more like non-profits).

Our goal was and is to be a clearinghouse for knowing about the partnerships in the county and best practices in partnerships. One challenge we had was that staff in other agencies felt it was going to be a takeover. We focused on how we could make it all less threatening. Some agencies were very proprietary about their partnerships and their staff. It took time to develop trust – and someone asked, “What if we had a partnerships award event?” Rewarding them got them to share more freely (rather than turf battles) and it acted as a catalyst to firm interactions and creates new connections.

### ***Did you hire new staff or reorganize existing staff to create the office? Or a combination?***

We reorganized existing staff, and downsized from 16 to eight. As positions were vacated, we reconfigured them to reflect the new work, converting an operations deputy to the CSR position. We developed relationships with other partnership staff not in our office (in other agencies). One consideration was to centralize everyone in one office, but we decided in the end it was better (for many reasons) to have a center point to be the receiver and issue-area experts in the field.

### ***What would you have done differently when establishing the office?***

When we started out we wanted to do everything... we were new, trying to get our name out there...if we were asked to do it, we’d get it done. Now, we’re trying to manage it all through the criteria. Also, get a top notch customer relationship management platform.

## General operations:

### ***How do you work with other divisions or departments within the county to either fulfill their strategic needs, yours, or the county’s in general?***

Some agencies understand what we do more than others...and those are the ones asking for more help. We most closely work with parks, libraries, environmental and infrastructure groups.

### ***How many official partnerships does your office manage annually?***

Our goal in the budget is to broker and launch six partnerships a year; six “big P” new partnerships, and 10-15 partnership connections that may be one-time projects or additions to existing partnerships.

### ***Do you have contracts or formal agreements with each partner?***

Yes, for the bigger ones as well as for smaller partnerships. Agreements are more complex for larger organizations or partnerships, and more like a memorandum of understanding for smaller partnerships. We renegotiate partnerships annually. Our goal is to make sure each partnership has a signed agreement so there is no misunderstanding around what organization is responsible for what activities, tasks, or finances (clarity around who does what, when, for how much, and how is it financed).

## Appendix D:

# Highlights from interview with Boston Office of New Urban Mechanics

## Establishing the office:

### **Why was the office established? What is the primary mission?**

Part of Boston's municipal government, the office New Urban Mechanics serves as the City's research and development lab, building partnerships between City agencies and outside institutions and entrepreneurs to pilot projects in Boston that address resident and business needs. The specific projects are diverse – from better designed signs and trash cans to high tech apps for smart phones and super-sensitive sensors for vehicles. Across all these projects, the office strives to engage constituents and institutions in developing and piloting projects that will re-shape City government and improve the services we provide.

In order to secure Boston's role as the hub of municipal innovation, the Office of New Urban Mechanics will focus on exploring and implementing innovations that enhance traditional city services and operations. Under Mayor Thomas Menino's leadership, the office will develop and implement new ideas that improve city service delivery, such as next-generation applications for the city's Citizens Connect iPhone suite. The office will also work to tap into local sources of innovation, including residents, employees, communities, and institutions. *(Wolk & Ebinger, 2010, City of Denver)*

### **Did you hire new staff or reorganize existing staff to create the office?**

No, It started informally over the previous years and was announced by the Mayor in January, 2010 and we reorganized existing staff to operate the new office. *(Osgood, Chris City of Boston, 2014)*

### **What would you have done differently when establishing the office?**

Nothing. We had a small budget; that forced us to focus on discrete projects. We had a small team; that forced us to partner significantly. We had a flexible mandate; that allowed us to explore widely. *(Osgood, Chris City of Boston, 2014)*

### **How did you establish the initial goals and what were the primary challenges you faced in establishing the office?**

Our initial goals flowed from the issues areas that were highest on the Mayor's and the residents' agenda: schools, neighborhoods, engagement. *(Osgood, Chris City of Boston, 2014)*

Bandwidth. So much great opportunity. *(Osgood, Chris City of Boston, 2014)*

## General operations:

### **How do you measure the value of what you do?**

We evaluate our projects based on both specific outputs (e.g. downloads of apps, potholes filled) and outcomes (e.g. increased sense of citizen engagement and empowerment.) *(Osgood, Chris City of Boston, 2014)*

### **How do you evaluate incoming requests for partnership? Ranking system?**

We have three criteria: (1) does the project meet a high priority of the city; (2) are the partners inside and outside City Hall aligned to do it; (3) do we have the resources to support it. *(Osgood, Chris City of Boston, 2014)*

### **What sort of forms or structures have you implemented that you found particularly helpful? Would you be willing to share any of these documents?**

The structures we find most useful are enduring partnerships with universities and companies as well as our fellowship and internship programs. *(Osgood, Chris City of Boston, 2014)*

### **How do you measure Return on Investment or value of partnerships?**

Our partnerships are measured on how well they help us (1) source ideas; (2) support and/or study projects; (3) scale and/or share results. *(Osgood, Chris City of Boston, 2014)*

***Are there things that you would do differently if you were establishing an office from the ground up?***

Create evaluation partnerships with universities at the beginning. *(Osgood, Chris City of Boston, 2014)*

***How do you balance incoming requests with proactively identifying new partnerships?***

It's a very tough balance. In general, we try never to be an office that will say no to exploring new ideas. Our intent is to be the office of yes. *(Osgood, Chris City of Boston, 2014)*

## Appendix E:

# Additional resources utilized but not referenced (distributed as digital content)

1. *Public-Private Partnerships Reference Guide*. The World Bank.
2. *10 Strategies for Successful Public Private Partnerships*. Urban Land Institute.
3. *The Partnering Toolbook*. Ros Tennyson, Partnership Specialist and Director of Learning Programmes, International Business Leaders Forum.
4. *The Partnership Toolbox*. WWF, Rod Sterne, Deborah Heaney and Bruce Britton.
5. *Innovations*. Quarterly Journal, MIT Press, New Orleans, 2010.
6. The National Council for Public-Private Partnerships (<http://www.ncppp.org>).
7. *Metrics for Public-Private Partnerships: Case Studies*. Eric Teicholz, IFMA Fellow Graphic Systems, Inc.
8. *PPP Basics and Principles of a PPP Framework*. May, 2012. Public-Private Infrastructure Advisory Facility. May, 2012. Public-Private Infrastructure Advisory Facility.
9. *Extraordinary Public-Private Partnerships*. The Ideas Quarterly. August 2009, Alliance for Innovation.
10. *A Handbook of Alternative Service Delivery for Local Government*. Kurt Thurmaier, Editor with Dawn Peters and Craig Rapp. Authors: Jerry Gabris, Heidi Koenig, Craig Maher, Katherine Piker, Alicia Schatteman, Kimberly Nelson.



## Appendix E:

# Partner survey tool

### City of Edmonton: Enriching Livability Through Partnership

The City of Edmonton has a long standing history of working with partners to enhance public services, operations, and facilities. These partnerships play a critical role in accomplishing the Transforming Edmonton Vision, especially as it relates to issues of livability and quality of life.

We want your candid opinion on how the City could be more effective in its approach to developing and maintaining partnerships. How well do we seek and evaluate new organizations? Are we providing the right kind of support for our current partners? Where are the gaps, if any?

Please take 5-10 minutes to complete this survey. Your feedback will be used as a part of a larger project with the International City/County Management Association ([icma.org](http://icma.org)) to provide recommendations on Edmonton's Community Services Partnership Development Initiative.

I am very pleased to share with you a short survey designed to gain greater insight into our relationships with our key partners. This information will help us continue to strengthen our partnerships, build on successes, and identify new opportunities for growth. Please take a few moments to complete the questionnaire, and I thank you very much for your participation.

Linda Cochrane  
GM, Community Services

**Disclaimer:** This survey will not be shared outside the City of Edmonton staff or the research team, though selections from comments or data samples may be used in the final report, which will be available to the public. We request honest feedback from all participants.

#### \*1. Which description best fits your organization?

- Partner: Other Level of Government
- Partner: Not-for-profit
- Partner: Private sector
- Partner: Public Agency or Institution
- Partner: Civic Organization
- City Staff
- Other (please specify)

**2. Organization information (for your primary contact related to this survey or the partnership)**

**Organization:**

**Address:**

**City/Town:**

**Province:**

**Postal Code:**

**Email Address:**

**Main Phone Number:**

**3. Contact information for staff completing the survey.**

**Name:**

**Email Address:**

**Phone Number:**

**\*4. In two or three sentences, how would you describe your partnership with the City of Edmonton?**

**5. Approximately how long has your organization been a City of Edmonton partner?**

- Up to one year
- One to three years
- Three to six years
- Six to 10 years
- More than 10 years

**6. Are other organizations besides the City of Edmonton involved in this partnership? If yes, please list other partners below.**

**\*7. What resources does the City of Edmonton provide to support the partnership?**

**(check all that apply)**

- Funding
- Staff resources
- Technology
- Specialized knowledge
- Access and relationships with other organizations
- Political support
- Space
- In-kind contributions (please mark "other" and list in the box below)
- Other (please list)

**\*8. What resources does your organization provide to support the partnership? (check all that apply)**

- Funding
- Staff resources
- Technology
- Specialized knowledge
- Access and relationships with other organizations
- Political support
- In-kind contributions (please mark "other" and list in the box below)
- Other (please list)

**\*9. Planning: Please rank in order of importance how the following statements pertain to your partnership with the City of Edmonton; select "1" as your most important and "6" being least (relative to the other choices).**

<input type="text"/>	Having a clear mission that is communicated to all partners (written or verbal).
<input type="text"/>	Having a clear understanding of goals and objectives by all partners.
<input type="text"/>	Taking responsibility for action items and time-frames by all partners.
<input type="text"/>	Developing strategies for measuring the performance of the partnership.
<input type="text"/>	Linking performance measurement to decision making.
<input type="text"/>	Flexibility in the partnership that allows partners to adjust specific goals as conditions change.

**\*10. Communication: Please rank in order of importance how the following statements pertain to your partnership with the City of Edmonton; select "1" as your most important and "7" being least (relative to the other choices).**

<input type="text"/>	Information flowing to every level of the partnership.
<input type="text"/>	Using multiple tools/vehicles to communicate necessary information (meetings, email, newsletters, conference calls, etc.)
<input type="text"/>	Having an open dialogue about areas for improvement among partners.
<input type="text"/>	Collecting feedback from the community served by the partnership and using this feedback in the decision making process.
<input type="text"/>	Seeking recognition for the partnership through publications, award programs, conferences, etc.
<input type="text"/>	Identifying a strategy for communicating with each other/each member of the partnership.
<input type="text"/>	Identifying a strategy for communicating with the target audiences.

**\*11. Resources: Please rank how accurately the following statements relate to your partnership.**

	strongly disagree	disagree	don't know/doesn't apply	agree	strongly agree
The partnership consists of a balanced mix of nonprofit and business partners.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volunteers, students, and donations are used frequently to limit costs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New revenue generating strategies are explored regularly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategies have been developed to educate funders on the value of partnering.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**12. Please enter demographic information.**

**Name:**

**Title:**

**Department:**

**Email Address:**

**\*13. Length of Service with City of Edmonton**

- One to two years
- Two to five years
- Five to 10 years
- 10-15 years
- More than 15 years

**\*14. Are you or your staff directly involved in developing or managing a partnership?**

- Yes (please see next question)
- No

**15. If you answered "yes" to the last question, please specify the type of partnership you are involved in. The options are:**

**1. City Related Entities**

**2. Collaborative Arrangements (with 7 sub-categories, a-g)**

**3. Federal / Provincial Related Entities**

- 1. City Related Entities: organizations which are owned or established by City Legislation, bylaw, Council Resolution or related acts.
- 2a. Joint Ventures - arrangements between the City and other legal entities, where all parties agree to jointly work together to obtain a desired outcome, with each party having a defined management role and sharing the business risks and rewards of the project's outcome
- 2b. City Alliances - arrangement between the City and organizations that are based on mutual interest. The City is primarily a facilitator, providing some key resources, participates in the setting of service expectation, and is informed on outcomes. The other party is responsible for the service delivery, and has full management and control of the operational aspects of the arrangement.
- 2c. Sponsorship – contributions to events, programs, and facilities in return for a substantive marketing benefit. Does not qualify for a tax receipt.
- 2d. Donation – cash or in-kind contributions, whether designated or not, which provide assistance to the City. Donors do not receive a substantive benefit in return. Qualifies for a tax receipt.
- 2e. Grant / Preventive Social Services Organization - receives City/Provincial funding and has to comply with the conditions of the City and the funding/FCSS agreement.
- 2f. Agencies - delivers services on behalf of the City on a fee for service basis. The City sets the terms of the delivery, but the Agency is responsible for the delivery and financial result.
- 2g. License / Lease Arrangement - Community and Private Organizations that have a lease or license of occupation with the City and meet the criteria approved by Council for Community Association or Social / Recreational Organizations.
- 3. Federal / Provincial Related Entities: organizations established under Provincial Acts, where the Act sets out the governance structure.

**\*16. How would you rank the coordination among staff regarding partnerships (generally)?**

- Highly coordinated at all levels
- Moderate coordination
- Little to no coordination
- Varies depending on project
- Don't Know
- Other (please specify)

**\*17. What specific value(s) do you think partnerships bring to the City of Edmonton?**

**18. Can you think of a partnership you are involved in which excels in one or more of the following areas? Please identify all partnerships that apply to each area below.**

**a. Partners have a clear understanding of goals and objectives.**

**b. Information flows to every level of the partnership.**

**c. Feedback from the community served by the partnership is collected and used in the decision making process.**

**d. The partnership consists of a balanced mix of nonprofit and business partners.**

**19. What are the specific roadblocks in the way of effectively managing partnerships?**

**\*20. In your opinion, what could the City be doing better to target new partners and manage existing partnerships?**

**\*21. You may use my quotes or comments as examples in the final report presented to the City of Edmonton.**

Yes (with attribution)

Yes (anonymously)

No

**\*22. May the research team contact you to further explore your input?**

Yes

No

**23. Please add any additional comments or feedback below. Thank you for your time.**

This personal information is being collected under section 33(c) of the Freedom of Information and Protection of Privacy Act and will be used in the administration of the "City of Edmonton: Enriching Livability Through Partnership" survey to partner groups. If you have any questions regarding the collection of this information, please contact the program coordinator at 780-xxx-xxxx.

**ICMA**

*Leaders at the Core of Better Communities*