

Home Management Resources Partnership

Learning History

The question of how to marry theory and practice in building healthier communities is among the oldest and most pressing challenges to human flourishing. The gulf between creative ideas and practical solutions is often wide, and the task of transforming vision into lasting value is rarely easy. Over the past decade, we at Memorial have experienced some of the frustrations and rewards of confronting this challenge in reevaluating both our vision of a healthy community and our understanding of the role we can best play in helping to bring this vision to fruition.

One important lesson we have learned is that working to foster a healthy community is a lot like building a relationship. First and foremost, high hopes, promises, and lavish gifts are no substitute for hard listening, steadfast commitment, and careful stewardship of resources. Moreover, in our friendships and community building efforts alike, there is always more to learn, both about ourselves and about others. Accordingly, we must be prepared in each of these endeavors to address our strengths and weaknesses openly, to discern carefully how they complement the capacities of those working with us, and to risk investing ourselves even though we don't always know at the outset where the relationship will take us.

It is precisely this set of challenges that Memorial has addressed through the development of specific strategic alliances or partnerships. What follows is the story of the important role that alliances and partnerships have played (and continue to play) in the implementation of our initiatives to aid in the creation of a healthier community. This particular partnership with Home Management Resources, the first of three strategic alliances with local organizations, began as a result of a shared vision of “creating a healthier community by strengthening families.”

Do you want to dance? *Forming a Strategic Partnership*

In 1998, five years into its learning experience with the Community Benefit Fund (Tithing) Memorial Hospital decided that short-term alliances with multiple organizations mostly yielded limited results. In order to have more impact, they decided that they would seek to develop long-term relationships with a few strategic partners. It was out of this shift in focus that the partnership between Memorial Hospital and Home Management Resources emerged.

Choosing your dance partner: *Selection criteria for strategic partnerships*

When two organizations are considering the possibility of a partnership, they must evaluate the viability of the relationship. According to Reg Wagle, Vice President of Memorial Health Foundation, and champion of the partnership, the following criteria must be carefully considered when selecting a partner:

- Each organization should possess a strong track record for doing what they do better than anyone else.
- There should be considerable common ground in the missions of the two organizations, and a positive “chemistry” between the individuals working together.
- Each organization should have respected, charismatic leadership to represent the best practices and interests of their organizations.
- The interaction between the two organizations will serve to transform each of the partners.

When the leaders of the two organizations first encountered each other it became evident that Memorial Hospital and Home Management Resources resonated on all of the criteria.

Home Management Resources is a charitable organization based on the premise that healthy families are the foundation of a strong community. Since 1986 their mission has been to enable families to improve the quality of their life through an educational forum and personal assistance. The shared vision of creating healthier communities by strengthening families attracted the two organizations to each other. After attending a “graduation ceremony” of HMR participants, Reg Wagle returned to Memorial Hospital and told CEO Phil Newbold “there is something powerful going on down the street and we need to learn from it.” They were able to imagine the potential for transforming a community – one family at a time. After initial discussion with Gwen DeLee, the Executive Director and Co-Founder of Home Management Resources, both partners agreed to dance.

Learning the Dance steps: *The step by step process for developing & maintaining the partnership*

The most fundamental key to the success of the partnership is finding a way for organizations of disparate sizes and resources to equally participate in the initial development phase. Memorial Hospital had 3,500 employees, whereas Home Management Resources had a staff of approximately 50 people, most of whom were volunteers. At first, some members of Home Management Resources were concerned that they might be dancing with an “800 pound gorilla”. It was important for the undertaking to be mutually inclusive from the start. The ultimate goal was a true partnership, not the dependency of a smaller organization upon a larger one with access to more resources. In 1999, a group of approximately 30 people was assembled with representatives from staff, boards and management of each organization. Barbara Walsh, Assistant Director for Organization Development, acted as facilitator and organized the initial meetings. She brought valuable facilitation skills to the process as the partners were getting to know each other. One of her main tasks was to ensure equal participation of both partners in the planning process. Participants met monthly for one year to develop the plan of action for this new strategic partnership.

Step 1: Understanding the change process: It is critical that the participating organizations receive assistance in managing the inevitable change that accompanies a new partnership. In the initial meetings the participants were led through a 5 step Change Management Model in which they learned how to:

- Motivate change and create readiness for it. They also learned some methods to help overcome the anticipated resistance to change.
- Understand the individual mission, vision and goals of each organization and begin to identify the common values and goals to build the foundation of the partnership.
- Develop support to drive the change. In this step, key stakeholders who would be instrumental to the success of this new working relationship were identified.
- Manage the transition. Group members committed to action plans and activities to support the desired outcomes.
- Manage the momentum. Participants discussed how to provide resources for change as well as how to best develop new competencies.

Step Two: *Creating a shared vision for this partnership.* For Memorial Hospital and Home Management Resources, everyone in the planning group was committed to a shared vision of “creating a healthier community by strengthening families.” It is critical that an attitude of equal participation from each organization be established from the start. Therefore, sessions to create the vision should be conducted by a skilled facilitator. For example, at the end of one year of planning meetings, Memorial Hospital and Home Management Resources agreed on the following Partnership Development Plan:

The main *priorities* and *desired results* identified by the group were:

- Increasing the capacity of both organizations.
- Creating synergy through shared resources.
- Offering services in new locations and to new client groups.
- Improving the quality of life in the workplace and community.
- Gaining “buy-in” from the community for the shared vision.

Step Three: *Developing the plan.* In this phase, everyone rolls up their sleeves and gets to work with regard to how this partnership will work. It is necessary to specifically identify the goals, actions necessary to achieve the goals, and the desired results. The meetings centered on setting priorities and making plans on how to implement them. The group then needed to identify the *specific actions* that would yield the desired results and assign accountability for each action item: For example:

- Expanding staff and resources to meet expansion needs.
- Investing in the technology infrastructure of HMR.
- Identifying new alliances/co-mingling clients.
- Sharing knowledge through best practices and cross training.
- Co-sponsoring and participating in community events.

Step 4: *Identify Critical Success Factors/Potential obstacles:* At each meeting the group identified what they perceived as the factors that were necessary to achieve the desired outcomes. Potential barriers to success were also identified. For the partnership between Memorial Hospital and Home Management Resources, the *critical success factors* were:

- Active commitment of people.

- Development of other appropriate alliances.
- Adequate funds and infrastructure.
- Effective marketing and promotion.
- Increasing the visibility of HMR.
- Commitment to open and frequent communication.

Some of the *potential obstacles* that could derail success were identified as:

- Resistance to change.
- Over-extension of both organizations' resources.
- Poor or inadequate planning.
- Loss of vision/deviation from goals.
- Turf battles and egos.
- Limited resources.

Step 5: Develop a *process for ongoing evaluation of the partnership*: Intending to go beyond traditional program evaluation, the development group established the following criteria for evaluating the success and effectiveness of the relationship itself:

Internal Linkages: Have we established successful working relationships within our organization to link our partner with key staff and resources?

External Linkages: Have we introduced our partner to appropriate external resources/people who can contribute to the achievement of our partner's goals?

Project Innovation: How successful have we been in creating new and different collaborative initiatives together?

Capacity Building: Have we enhanced our own ability to provide support and services to our customers as a result of this partnership?

Shared Learning: Have the staff, volunteers, board members and clients/customers of each organization benefited from what we have learned together?

Partner Transformation: To what extent has our own organization changed as a result of participation in this relationship?

How to avoid stepping on each other's toes while dancing: Critical lessons learned & recommendations

As the partnership forms and evolves, it can be challenging for the smaller, grass roots organization to dance as an equal partner with a larger, resource-rich organization. When participants of both organizations were asked to summarize what they learned from the process thus far, they offered the following insights:

- Create parity from the start.
- Involve both organizations in the planning phase/be collaborative and inclusive.
- Invite a skilled facilitator to lead the meetings.
- Leave the logos and egos at the door.
- Communicate, communicate, and communicate.
- Establish a solid relationship between the champions based on mutual respect and honesty.
- Stay true to your vision and mission/Say “no” to good ideas that don’t advance the vision.
- Respect each other’s resources and capacity to ensure that neither party will be underestimated or overwhelmed.
- Be explicit in defining each partner’s competencies. You don’t do their work and they don’t do yours.
- Slow down. Remember building trust and co-operation between partners is a gradual process that evolves through interaction over time.
- Recognize the capacity of the smaller organization and don’t implement too many initiatives at one time. The larger organization may have a tendency to take for granted access to resources that may not be available to the smaller organization.

- Partners should help each other establish linkages to the outside community by sharing connections, client bases and networks.
- Commit to the long haul. Both partners are committed to a long-term relationship.
- Establish a structured evaluation process based on both quantitative and qualitative measures to track progress on the desired outcomes.
- Work together in a spirit of trial and error. If the plan works, celebrate together. If it doesn't, learn from your mistakes, celebrate the learning, and try again. This partnership is a work in progress.

Evaluating the dance performance: Rating the effectiveness of the partnership

Approximately two years after the formation of the partnership, each organization rated the effectiveness of the partnership based on six criteria. In the evaluation process, each organization separately convened key participants in the partnership to conduct their own dialogues about the primary objectives of the partnership. They rated their own organization on

The Process: **HMR / MHS: How Good A Partner Am I?** (A Partnership Evaluation, NOT A Program Evaluation)
 Each organization separately convened key participants in the partnership to conduct their own dialogues about the primary objectives of our partnership, Then rated their own organization on how well they contributed to that objective of the partnership,
 A joint meeting of both groups drove further sharing and dialogue and led to preliminary planning for enhancing our partnership in the future.

Partnership Objectives

INTERNAL LINKAGES

Have we established successful working relationships within our organization to link our partner with key staff and resources?

EXTERNAL LINKAGES

Have we introduced our partner to appropriate external resources / people who can contribute to the achievement of our partners goals?

PROJECT INNOVATION

How successful have we been in creating new and different collaborative initiatives together?

CAPACITY BUILDING

Have we enhanced our own ability to provide support and services to our customers as a result of this partnership?

how well

SHARED LEARNING

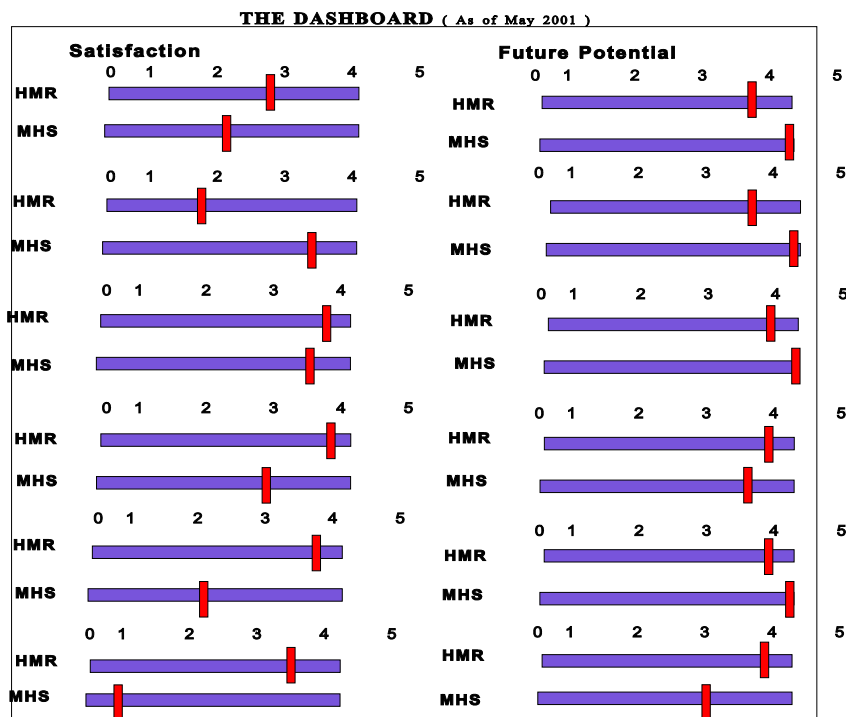
Have the staff, volunteers, Board members and clients / customers of each organization benefitted from what we are learning together?

PARTNER TRANSFORMATION

To what extent has our own organization changed as a result of participation in this relationship?

what they

contributed to that objective of the partnership. This was followed by a joint meeting of both



groups for further dialogue regarding the results and to begin preliminary discussions for enhancing the partnership in the future. As helpful as this “dashboard” scan of the evolving relationship is, the most valuable product of the process is the rich, penetrating dialogue it elicited between the partners.

A review of the partnership evaluation indicates that two years after its formation, Home Management Resources has greatly benefited from its involvement in the partnership. Its infrastructure has been strengthened with Memorial Hospital’s assistance in upgrading their computer network and helping to improve computer literacy. Capacity has been expanded and Home Management Resources has revised programs and moved to a new location with greater visibility to better serve the needs of its expanding client base. Access to the experience and resources of an older and larger organization has proved extremely beneficial. They report that the exposure to the leadership and management style of the larger organization has enhanced their own professionalism and accountability.

Two years into the partnership, Memorial Hospital has not been the beneficiary of as many results. However, they remained extremely positive about the future potential. One area in which Memorial Hospital believes they can benefit is by taking advantage of the seminars offered by Home Management Resources. By promoting a healthy family as a priority of the workplace, Memorial Hospital expects to improve the quality of their own working environment. Also, since the partnership with Home Management Resources was one of the first attempts at establishing a long term strategic partnership with a non-medical organization, Memorial Hospital has gained valuable insights into the process and dialogue involved in setting up such partnerships. Additionally, Memorial Hospital is continuing to learn how to respect the capacity issues and vulnerabilities of smaller organizations. Each organization has benefited from each other’s strong leadership and dedication to excellence in their fields. Although their level of commitment may change as the partnership evolves, both organizations see each other in their futures.

Learn to Tango: *Experiment for better performance*

Now that you know your partner; it's time to experiment and learn new steps. We all can recognize that every family that takes home a new baby, a new diagnosis of a chronic condition for a child or adult, a new open heart or orthopedic repair, or almost anyone going home from the hospital will be introducing changes to that household. Home Management Resources' unique kind of skills training makes them an ideal partner for Memorial to further enhance and extend "The Memorial Experience" for families we serve. Home Management Resources teachings and interventions woven into the "transition home" can be invaluable to a family.

By early 2003, Memorial will prototype this new innovation with Home Management Resources. HMR counselors and Memorial NICU staff will bring elements of the Home Management Resources' curriculum to help prepare parents to take their new baby home.

Let's Dance: *Find the right partner for your organization and then dance*

Both Memorial Hospital and Home Management Resources believe that their partnership has been a worthwhile undertaking. Both organizations are dedicated to their shared vision of changing their community for the better by strengthening the family. By working together and sharing the best minds, hearts and spirits within each organization, hopefully many partners will come to the dance and learn the steps to build healthier communities everywhere for generations to come.