Activity 15: Alliances and Partnerships Landscape Analysis

Goals

1. Identify desirable characteristics for potential ally/partner organizations to have

2. Identify potential ally/partner organizations with desirable characteristics

Prerequisites

No specific ITAViP activity; however, having a strategic plan or set of strategic goals will help participants identify program strengths/ weaknesses and prioritize next steps.

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers)

Length

60 minutes as a group, follow-up work assigned to flesh out analysis

Activity Instructions

Part I: Identifying Desirable Characteristics (complete as a group)

1. Brainstorm a list of characteristics you'd like potential allies or partners to have.

   a. These can be specific elements your program lacks, things you're doing well but would like more of, or bigger-picture values you'd like to see. Examples include Development resources, Language support, Geographic diversity, etc.

   b. It can be helpful to set objectives for the number of ideas to be listed and the time to be spent, e.g. "Let's spend 10 minutes coming up with a list of 20 characteristics we'd like our partners to have."

2. All together, sort the brainstormed ideas into high-level groupings.

   o For example, high level groupings might be "domain expertise" or "commitment to open access."

3. Take a sticker vote to select the high-level groupings that are the most critical / highest priority based on your program's strategic goals.

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

Part II: Identifying Potential Allies and Partners (complete as a group)

1. Based on the prioritized list of desirable characteristics, brainstorm a list of potential allies and partners that have at least some of those characteristics.

2. Work together to create a landscape analysis template that includes (at least) the following categories. A sample is included below.

   a. Organization name

   b. High level purpose (mission, vision, etc.)

   c. OSS programs currently used/supported by the org, if known

   d. Geographic area served
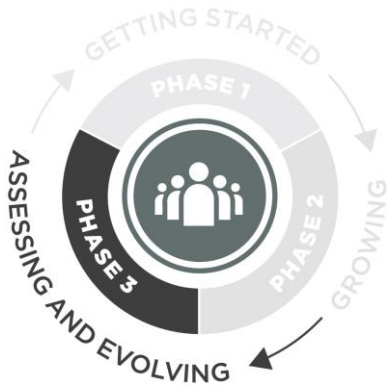
Activity 15: Alliances and Partnerships Landscape Analysis

3. Assign one or more activity participants to continue the ally / partner landscape analysis in preparation for moving to the next activity, Value Propositions for Alliances and Partnerships.

Part III: Identifying Potential Allies and Partners - split up brainstormed list and assign to individual team members

1. Building on the list started during the group meeting, complete further research on additional organizations that may be potential partners or allies.

2. Analyze the landscape by assessing each organization on the list against the list of desirable characteristics developed at the beginning of the exercise. Share the results of your analysis with activity participants and program leadership.

3. Move on to the exercise Value Propositions for Alliances and Partnerships.
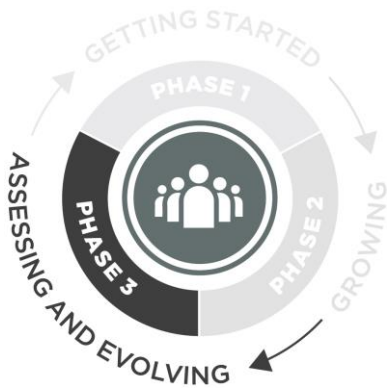
Activity 16: Value Propositions for Alliances and Partnerships

Goals

1. Identify program strengths that would be attractive to new partners
2. Create value propositions to share with potential new partners

Prerequisites

Activity: Partnerships and Alliances Landscape Analysis. In addition, having a strategic plan or set of strategic goals will help participants identify and prioritize values.

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers)

Length

60-90 minutes

Activity Instructions

1. Brainstorm a list of program strengths, values, benefits, or services that would be attractive to new allies or partners.

   o It can be helpful to set objectives for the number of ideas to be listed and the time to be spent, e.g. "Let's spend 10 minutes coming up with a list of 20 strengths/benefits our program brings to the table."

2. Take a quick sticker vote to select the strengths/benefits that are likely of the highest value. They can be those you feel are your program's most unique strengths, those most likely to be lacking in your potential allies, or another metric.

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

3. For each of your top vote-getters, **discuss and capture** how the strength/benefit would solve problems faced by your potential allies and partners. For example, could your program help your potential ally/partner:

   o Save time and/or resources? Help them increase resources?

   o Improve engagement with their communities?

   o Strengthen research, teaching, and learning?

   o Eliminate or mitigate risks?

   o Help end users access materials more effectively?

   o Create positive social consequences?

4. Collate the value proposition elements into a value proposition document.

   o Good examples of Value Proposition maps/documents include:

     ▪ https://www.strategyzer.com/canvas/value-proposition-canvas

5. Communicate your value proposition with potential allies and partners as part of a planned outreach effort.

   o If your organization does not have a standard communications plan template, this version may be helpful.
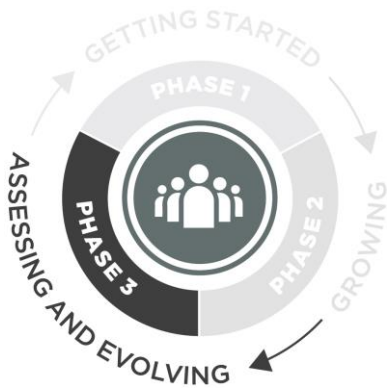
Activity 17: Developing an Evaluation Plan for Alliances and Partnerships

Goal

Develop a plan for evaluating existing alliances and partnerships

Prerequisites

Existing alliances or partnerships that require evaluation.

Who Should Participate?

Program leadership (strategic thinkers)

Length

90-120 minutes; activity can be repeated as necessary for different alliances or for the same alliance on a regular basis (e.g., annually)

Note

This activity is adapted from the book "Managing for Sustainable Development Impact: An Integrated Approach to Planning, Monitoring, and Evaluation" by Cecile Kusters and Karen Batjes. More in-depth information about each of the steps and questions below can be found in the book.

This activity works best with a facilitator to help move the group through each question, achieve consensus, and summarize/document the results of each question for use in the Partnership/Alliance Evaluation Template.

If there is disagreement on any element of the plan, the Gradients of Agreement (included below) may help achieve either consensus or a level of disagreement all are comfortable with.

Activity Instructions

1. Discuss and come to consensus on the purpose and scope of the evaluation.
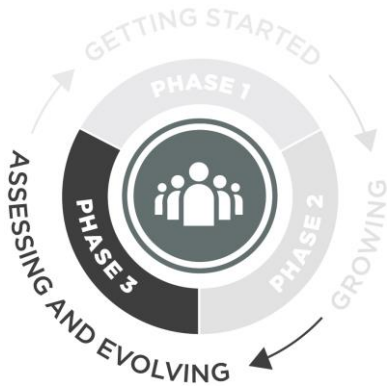
What is the purpose of the partnership evaluation? Example reasons include: accountability, stakeholder empowerment, gathering information to make strategic change, gathering information to make operational change, and knowledge generation.

What is the scope of our evaluation? Who are the target groups (all partners? a specific partner?), what's our time frame, and what is our budget (time and/or money)?

2. Discuss and come to consensus on key information needs for the evaluation.

It may help to frame your qualitative information needs around the criteria of impact, relevance, sustainability, effectiveness, and efficiency.

o Sample impact questions: What has changed as a result of this partnership? To what extent has the partnership helped us further our long-term goals? Has the partnership had any positive or negative consequences?

o Sample relevance questions: Is the partnership a good idea given the long-term goals of our program? Does it support the priorities of our users and stakeholders?

o Sample sustainability questions: Will the changes effected by the partnership last? Would there be continued positive impacts as a result of the partnership if it ended? Why or why not?

Activity 17: Developing an Evaluation Plan for Alliances and Partnerships

- o Sample effectiveness questions: Were the planned purposes and/or outputs of the partnership achieved? Why or why not?

- o Sample efficiency questions: Is the partnership worthwhile? Is the partnership the best way to achieve the planned-for outcome? What could we do differently to improve the partnership?

You may also wish to gather quantitative information about the partnership, including things that are measurable, relatively easy *to* measure - length of partnership, contributions to the program (time, money, code) - and relevant to your analysis.

3. Discuss and come to consensus on data collection, processing, and analysis.

A RACI matrix can be helpful in determining who will be responsible for data gathering, processing, and analysis. Different members of the team may be better suited to different types of questions or information gathering methods, or different expertise applied for analysis.

In this framework, analysis is "an important part of the evaluation process because it shapes the information that is reported and its potential use after critically reflecting on and making sense of these findings so as to inform decision-making."

4. Discuss and come to consensus on the process for reflection and decision-making.

Determine how the program will reflect on and make use of the results of the information gathering phase. A written report discussed asynchronously? A meeting or series of meetings?

This process should link back to the original purpose of the evaluation; for example, if the program suspects that a partnership is

 not working because of poor communication, a report suggesting improvements might be appropriate. If the purpose of an evaluation is to determine whether to continue working with a partner, an in-person or virtual meeting to discuss would be better.
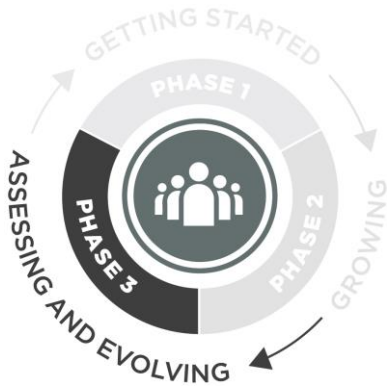
5. Discuss and come to consensus on communication and reporting.

How will the results of the evaluation be shared and reported on? Consider who the stakeholder/primary users will be; how to report on interim steps such as the kickoff, information gathering process, and results; and how the results will be shared.

At this point, if the discussion around the previous questions has been documented and summarized to everyone's satisfaction, the next elements can be assigned to someone for offline completion and sharing out with the group.

6. Plan for implementation.

Create a plan for implementation using the outcomes of the above discussion questions. You can use the Partnership/Alliance Evaluation Template to gather the results of the discussions, and fill out the sample RACI matrix for timeline and assignments.

Activity 17: Developing an Evaluation Plan for Alliances and Partnerships

GRADIENTS OF AGREEMENT

1	**Endorsement**	
2	**Endorsement with minor point of contention**	
3	**Agreement with reservations**	
4	**Abstain**	
5	**Stand aside**	
6	**Formal disagreement, willing to go with majority**	
7	**Formal disagreement, desolved of responsibility**	
8	**Block/veto**	

Tally votes
in each box

To use the Gradients of Agreement chart:

1. Record the proposal being used (e.g., on a flipchart or virtual whiteboard/document)
2. Confirm that everyone understands the proposal, and make any necessary changes
3. Read through the gradient definitions, from Endorsement to Veto
4. Poll the participants to see where everyone stands. Note that the results show the level of support for a proposal, final decisions will take the results into account but are not based solely on the poll
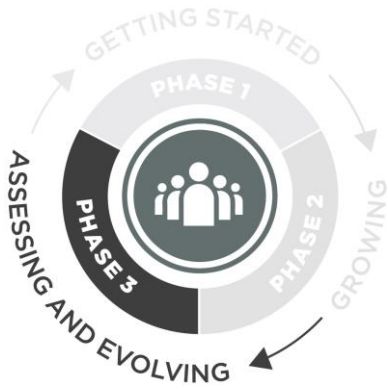
Activity 17: Partnership and Evaluation Plan Template
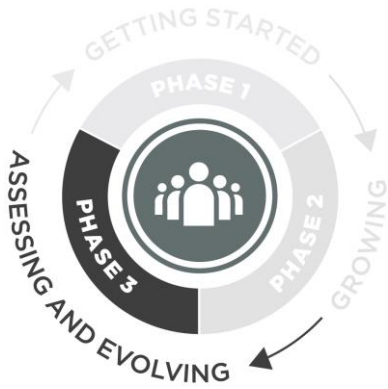
Prerequisites

Completion of Activity: Developing an Evaluation Plan for Alliances and Partnerships

Who Should Participate?

Program leadership (strategic thinkers)

Activity Instructions

Edit the plan template below to include the outcomes of Activity: Evaluation Plan for Partners.
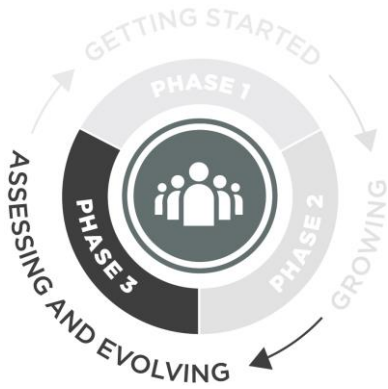
Activity 17: Partnership and Evaluation Plan Template

Partnership and Alliance Evaluation Plan Template

1. Purpose and Scope

2. Key Information Needs

3. Data Collection, Processing, and Analysis

4. Reflection / Decision-Making

5. Communication and Reporting Plan

6. Implementation Plan

Activity 17: Partnership and Evaluation Plan Template

RACI Matrix Example

Key:

R: Responsible - who is doing the work?

A: Accountable - who is signing off on the work?

C: Consulted - who is providing opinions/assistance?

I: Informed - who needs to be kept up-to-date on progress?

Task List	Person 1	Person 2	Person 3	Person 4
Scheduling and Project Coordination	R	C		I
Data collection Task 1		R	C	I
Data collection Task 2		R	C	I
Data collection Task 3		C	R	I
Data analysis Task 1	R	C		I
Etc.				I
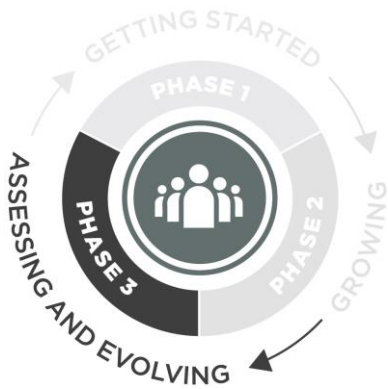
Activity 18: Context Mapping

Goals

1. Evaluate resource plans in response to the broader trends in the domain the program serves

2. Understand how changes in the environment may affect long-term sustainability

Prerequisites

None

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers), Program staff (operational expertise)

Length

90 minutes

Activity Instructions

1. Start with a virtual or physical whiteboard with four quadrants labeled Social, Technological, Economics, and What Else? If your group has more than 6-8 participants, you may break into smaller groups through Step 3.

   a. Social factors: these are values and cultural ideals and how they affect the value and necessity of a product or service.

   b. Technological factors: these include changes in technology, technology advancements, technology lifecycles, and how those factors can positively or negatively impact a product or service in the marketplace.

   c. Economics: elements such as budgets, priorities, opportunities, and how they can positively or negatively impact a program's resource sustainability.

   d. What else: trends that don't fit the above categories, e.g., political, legal, or environmental.

2. For each element in the map, take 10 minutes to brainstorm a list of key trends or events affecting your program and/or your stakeholders and note what evidence supports these trends.

   a. Social examples: focus on open access, globalization

   b. Technology examples: sunsetting technology, development trends such as microservices or headless software

   c. Economic examples: systemic budget cuts or reallocations, changing funder priorities

3. If you broke into smaller groups, come back together and report back to the group on those trends that were the most interesting, the most meaningful, those that sparked the most discussion, etc.

4. As a group, discuss the following questions. The table below can be filled in to help organize the map. Sample trends and action items are provided in the table.

   a. What are the core trends in each quadrant?

   b. Will the trend have a positive or negative effect on our program?

   c. What are action steps we could take to mitigate or take advantage of the trend?

   d. What is the priority of each action step?
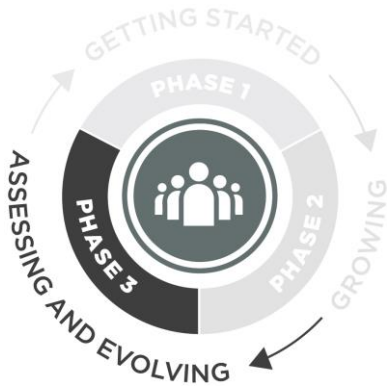
Activity 18: Context Mapping

5. To wrap up, identify 1-3 high priority action steps to add to your technical roadmap, communications plan, or other strategy document. If there are too many high priority items on your map, you may use a sticker vote to decide on the most important.

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

Sample Context Map Action Plan (examples in *italics*)

Quadrant	Trend	Positive | Negative | N/A	Action Steps	Priority (1 - low to 10 - high)
Social	*Funder focus on open access*	*Positive*	*Highlight this aspect of our work in funding requests*	*5*
Technology	*Central IT ending support for applications using PostgreSQL*	*Negative*	*Explore alternative hosting options for users*	*10*
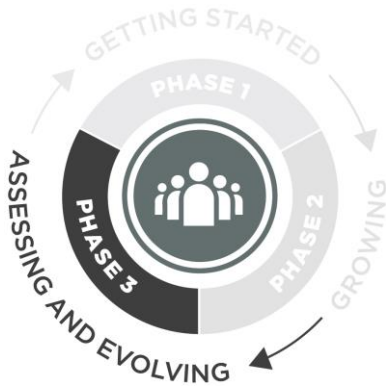
Activity 19: Global Outreach and Scaling Kickoff

Goal

Determine whether your program should devote resources to exploring global scaling or expansion

Prerequisites

None

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers)
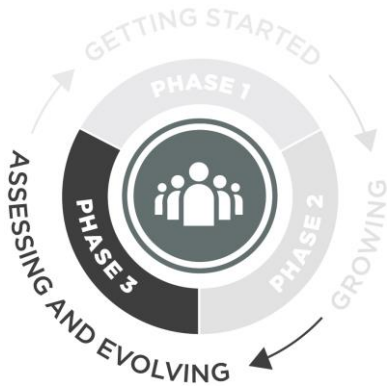
Length

60 minutes

Pre-Work

All participants should read at least Section VI, International Outreach and Scaling, of:

Keonig, Bonnie. *International Engagement for Impact in a Changing World*, 2015. https://www.goinginternational.com/wp-content/uploads/2015/02/international-engagement-for-impact-in-a-changing-world1.pdf

Activity Instructions

What does it mean to scale or expand our programs globally? While questions around global expansion will not be answered in a single meeting, this activity provides a framework for determining whether devoting resources to exploring global expansion makes sense for your program.

1. As a group, take 45-60 minutes to discuss and capture some or all of the following questions. You may add additional questions depending on your program's situation. Designate a facilitator to help guide the conversation.

    o   Why do we want to scale/expand our program globally? Will it:

    ▪   Help further our program's mission/vision?

    ▪   Help our stakeholders achieve their goals?

    ▪   Improve our sustainability along one or more facets?

    o   How do we define 'scaling' (geographic spread, more people engaged, etc.)?

    o   What do we think we can accomplish by scaling?

    o   Are there other ways to achieve the impact we are looking for?

    o   Is anyone else doing what we want to do that we might be able to partner with?

    o   What are our timeframes? Are they realistic?

    o   What will the institutional structure be that will take those high priority ideas forward; i.e., what combination of staff and stakeholders will lead the expansion, and can we then support the additional work required if successful?
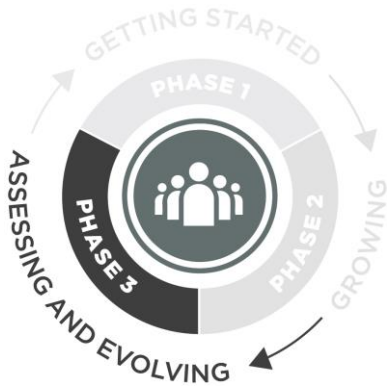
Activity 19: Global Outreach and Scaling Kickoff

2. Close the discussion and poll the participants using the Gradients of Agreement scale (included below) to determine if there is consensus to move forward with planning for global scaling or expansion. Note that participants are not being asked any specifics about global expansion yet, just whether continuing to explore it is a good use of program resources.

    o   The Gradients of Agreement are a way to tally the level of support for a proposal. Participants note how strongly they agree or disagree with a proposal, on a scale from "Endorsement" to "Veto." Final decisions take the results into account but are not based solely on the poll.

3. If the general consensus is that it **does not** make sense to explore global scaling or expansion, close the session with a plan to re-visit the question in the future.

4. If the general consensus is that it **does** make sense to explore global scaling or expansion, continue with Activity: Global Outreach and Scaling Milestones and Activities.

    o   Before closing the meeting, capture answers from the initial discussion for the questions "Why do we want to scale" and "What do we hope to accomplish." These will be used in the next Activity.

Activity 19: Global Outreach and Scaling Kickoff

GRADIENTS OF AGREEMENT

1	**Endorsement**	
2	**Endorsement with minor point of contention**	
3	**Agreement with reservations**	
4	**Abstain**	
5	**Stand aside**	
6	**Formal disagreement, willing to go with majority**	
7	**Formal disagreement, desolved of responsibility**	
8	**Block/veto**	

Tally votes
in each box

To use the Gradients of Agreement chart:

- Record the proposal being used (e.g. on a flipchart or virtual whiteboard/document)
- Confirm that everyone understands the proposal, and make any necessary changes
- Read through the gradient definitions, from Endorsement to Veto
- Poll the participants to see where everyone stands. Note that the results show the level of support for a proposal, final decisions will take the results into account but are not based solely on the poll
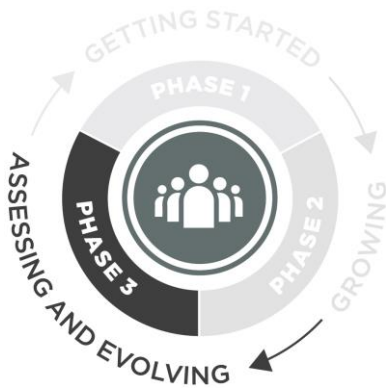
Activity 20: Global Outreach and Scaling Roles and Responsibilities

Goals

1. Identify and prioritize milestones and next steps for global scaling or expansion planning

2. Identify program staff/stakeholders responsible for moving forward

Prerequisites

Activity: Global Outreach and Scaling Kickoff

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers), Program staff (operational expertise)
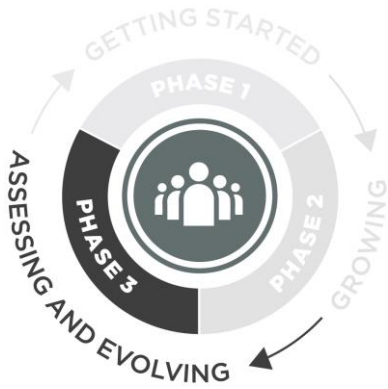
Length

90-120 minutes

Pre-Work

If they haven't done so already, all participants should read at least Section VI, International Outreach and Scaling, of:

Keonig, Bonnie. *International Engagement for Impact in a Changing World*, 2015. https://www.goinginternational.com/wp-content/uploads/2015/02/international-engagement-for-impact-in-a-changing-world1.pdf

Activity Instructions

1. Start the conversation by having participants review their answers to the questions: Why do we want to scale or expand our program globally and What do we hope to accomplish?

   o Re-use the physical/virtual whiteboard from the activity Global Outreach and Scaling Kickoff or re-write the answers on a fresh board.

   o If participants have had more time to think about expansion since the completion of the Global Outreach and Scaling activity, additional thoughts on scaling may be added at this time.

2. Take a quick sticker vote to rank the goals your program would like to accomplish by scaling. Participants may choose to vote for ideas that are the highest priority, those most likely to be successful, or another parameter.

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

3. For the top vote-getter, ask the group to generate four or five milestones that must be completed in order to reach the goal; for example, "translate the user interface" or "determine a pricing structure for members in [new region/country]."

4. Break into small groups and assign one milestone to each group. Each group should take 10-15 minutes to identify and list each step it would take to attain that milestone. Have the group write each step on a physical or virtual sticky note.
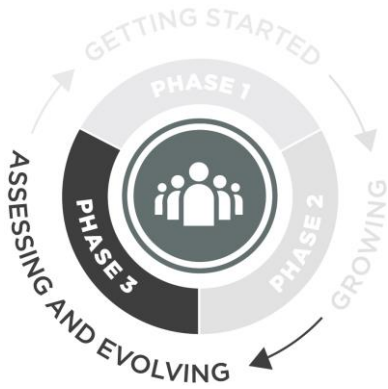
Activity 20: Activity: Global Outreach and Scaling Roles and Responsibilities

5. Place the sticky notes under each milestone, and then have groups report back, adding new sticky notes to one another's milestones to add any missing steps.

6. Place the milestones in order by whichever needs to happen first. For example, your program might need to identify a country or region to target first, before determining into which language you need to translate your interface or documentation.

7. Kickoff the project by creating a RACI matrix for the tasks identified under the first milestone (sample on page 3 below).

    o A RACI matrix is a responsibility chart that maps out each task and milestone or key decision involved in completing a project, and assigns which roles are Responsible for each action item, which are Accountable, and which needs to be Consulted or Informed.

8. Create additional RACI matrices as milestones are achieved.

Activity 20: Activity: Global Outreach and Scaling Roles and Responsibilities

RACI Matrix Example

Key:

R: Responsible

A: Accountable

C: Consulted

I: Informed

Milestone 1 Task List	Person 1	Person 2	Person 3	Person 4
Task 1	A	R	C	
Task 2	A		R	I
Task 3	AR			I
Task 4	A	R	I	C