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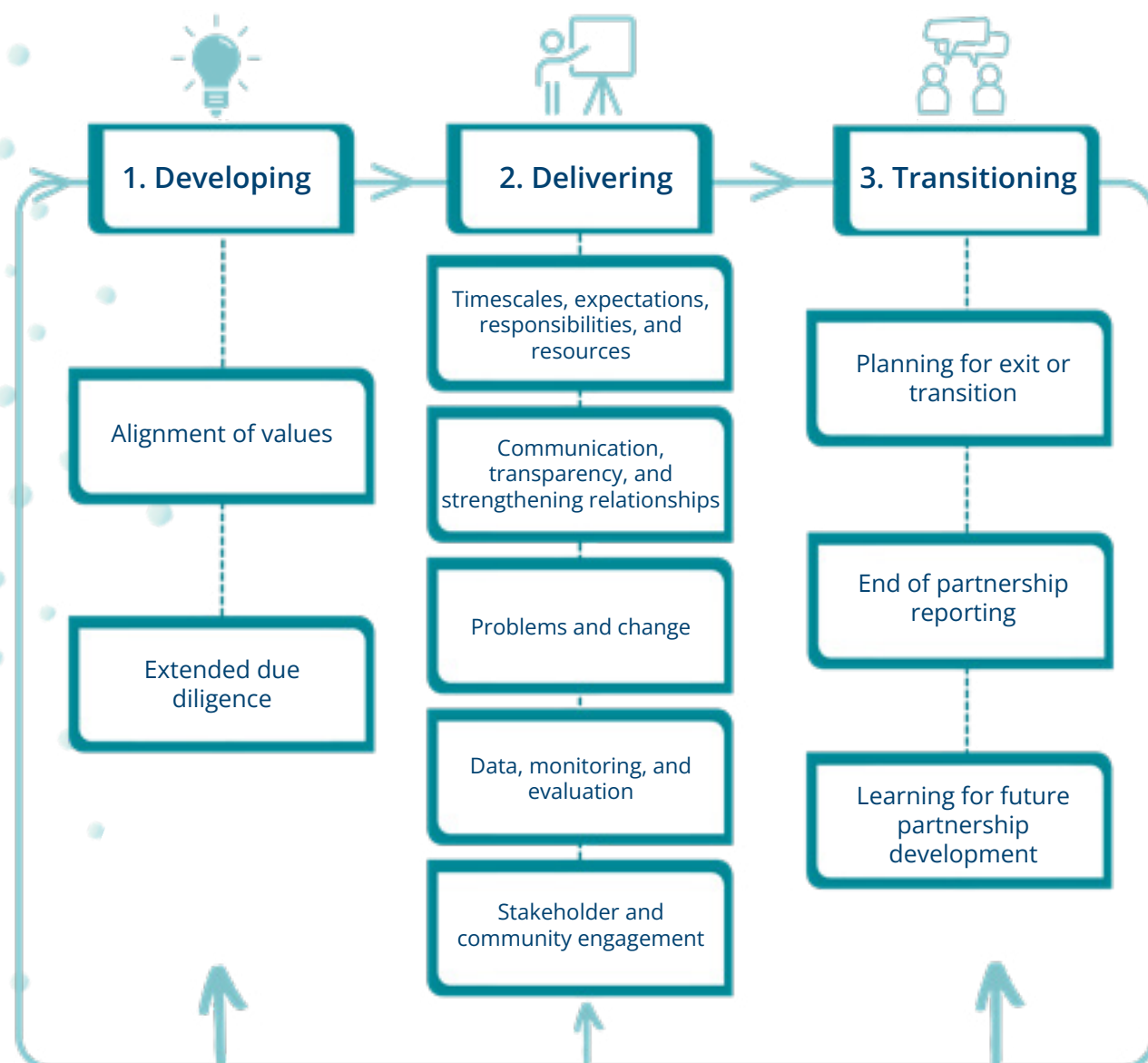
THE MCF PARTNERSHIP FRAMEWORK TOOLKIT

The purpose of the Toolkit

The MCF Partnership Framework Toolkit has been developed by the Impact and Evaluation team to serve as a comprehensive guide for identifying, establishing, nurturing, and transitioning partnerships on behalf of the MCF. Its primary goal is to cultivate highly successful partnerships. To achieve this, the Toolkit provides thoughtful prompts at every stage of the partnership process. These prompts encourage careful consideration by someone entering into or managing a partnership, supported by explanations detailing the significance of each step.

Within these explanations, the Toolkit presents a collection of practical questions and topics to be considered. It is important to note that these are not rigid mandates; instead they offer flexible guidelines. The Toolkit outlines a framework that visualises building partnerships as a process, using three principle headings: Developing; Delivering; and Transitioning.

MCF's Partnership Framework

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1. Developing  →  2. Delivering  →  3. Transitioning

1. Developing:
  Alignment of values
  Extended due diligence

2. Delivering:
  Timescales, expectations, responsibilities, and resources
  Communication, transparency, and strengthening relationships
  Problems and change
  Data, monitoring, and evaluation
  Stakeholder and community engagement

3. Transitioning:
  Planning for exit or transition
  End of partnership reporting
  Learning for future partnership development
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Stage 1 - Developing

The process of identifying and establishing partnerships.

This first stage of the framework relates to the process of discovery and the preliminary considerations made during the selection and appointment of a new strategic partner. This stage is crucial as it sets the stage for establishing robust foundations that are essential for the partnership's sustainability and ultimate success.

1 Alignment of values

Having broadly shared values underpins successful partnerships. Values do not need to be identical, but they should work in harmony so that the partnership can serve to uphold the strategic vision of the MCF in delivery of its goals, as well as the goals of partner organisations. Conflicting values or diverging priorities are likely to become an obstacle to effective partnership working. When identifying strategic partners the first question that should be asked is whether the organisations can work with the values outlined by the MCF in '**making a difference**', '**striving for excellence**' and '**responding to need**' in support of the broader MCF vision as detailed on our website.

Promoting Freemasonry through the work of the MCF underpins these values. Successful partnerships should work towards shared goals that help one another deliver their separate strategic objectives.

Questions you should consider are:

◆ Will the predicted impact of the partnership support the MCF's strategic vision and purpose, and help the MCF to deliver its strategy?

◆ Does the ethos and culture of the organisation fit with the MCF's values of being responsive to need, making a difference and striving for excellence?

◆ Does the partner fill gaps in respect of skills and expertise that we can draw upon as an organisation?

◆ Will the partnership support and/or be supported by the Freemason community more broadly?

2 Extended due diligence

The MCF has established systems in place that relate to the financial management of potential partners, checking for good quality financial reporting, auditing and stability. The purpose of an extended due diligence is to offer additional questions alongside the tender evaluation matrix found in these financial procedures.

These questions are set out to ensure alignment, but they also serve as aspirational goals. In the partnership process, reciprocity, learning, and organisational development are integral aspects, not only relating to ensuring alignment but also fostering mutual growth and understanding.

Considerations include:

◆ Safeguarding is an essential factor to consider when scoping partnerships. The MCF has a strong safeguarding ethos and a commitment against modern slavery. This must be strongly reflected in partnerships. Analysing the safeguarding policies of potential partners is an important part of the due diligence process.

◆ If the partner is a charitable organisation, what percentage of donations are actually spent directly on its charitable purpose or on its beneficiaries?

◆ How does their equity, diversity and inclusion (EDI) statement read? Does the proposed partner demonstrate commitment to EDI

and have EDI policies in place? Do they have a robust EDI action plan or are they on their way to develop one? What is their EDI vision about themselves and the beneficiaries they support? How does their EDI statement align to ours?

◆ Gain insights into their approach to generating business data and intelligence, focusing on their methods for learning and continuous improvement. Also, how do they approach impact measurement of their services and tracking the delivery of the company or charity's purpose?

◆ The Partnership Framework Toolkit could be used to support Environmental Social and Governance (ESG) aims, in particular in how the MCF influences social sustainability when working in partnership. Tackling socio-economic inequality, promoting equity, diversity and inclusion (EDI), supporting local communities and overall wellbeing are all aspects that overlap with the development of successful strategic partnerships. Social considerations of ESG are values-driven and are reflected not only internally, but also in the work we do with others.

Stage 2 - Delivering

The process strengthening and maintaining partnerships.

1 Timescales, expectations, responsibilities, and resources

Setting out expectations, roles and responsibilities from the outset is the foundation to good communication and partnership working. Establishing expectations from the outset should involve plans for external communication, particularly engaging with Freemason communities. Setting out roles and responsibilities should include decision-making, as well as responsibilities for administration, monitoring and reporting.

Establishing a single point of contact will help to ensure effective and consistent communication, offer continuity, and minimise the potential for mixed messages. The involvement from senior leaders is pivotal to partnership success. While senior leaders are not expected to drive the day-to-day management of partnerships, their attendance at key meetings (such as the 'kick-off' meeting, annual progress meetings or final reporting) helps to reinforce the strength of the partnership.

Factors to consider include:

◆ Have clear agreement on timelines and deliverables. Timelines are important to manage work expectations and for future planning.

◆ Shifting timescales can heavily impact the workload of those involved in the project, however a degree of flexibility is required in any partnership and is often inevitable. Consider whether you have sufficient staff resources required for the duration of the partnership. Be prepared to pivot from project plans and to communicate significant changes to all key players involved in the partnership.

◆ Consider how resources are shared by drawing on the strengths, capabilities and capacity of the respective organisations.

◆ Be mindful that social research can add time to projects, particularly where response rates are low and may require follow- up or extended deadlines.

Shared access to project plans and timelines may be useful so they can be updated 'live' and viewed by all stakeholders.

Ensure a shared understanding on the allocation of budgets.

Consider the dependencies between team members, and how the partnership fits into existing workloads.

Ensure expectations are set in respect of communication, particularly involving Freemason communities.

Are there any reasonable adjustments or accessibility requirements between partners? For example, co-workers may require accessible venues for meetings, scheduled breaks, or documents to be presented in different formats. The British Medical Association has produced useful, practical, guidance: BMA inclusive meeting guidance

2 Communication, transparency and strengthening relationships

Having clear channels of communication strengthens successful partnerships, helping to negotiate suitable ways of working, keeping projects under constant review and generally facilitating change. Trust is a key element in partnership building, often developing organically over time. It is important to be mindful of our perceptions of partners, and recognise our own bias so that we can enter into new partnerships with an inclusive mindset. Factors to consider include:

Agree expectations for communication in the early stage of partnership, with clear meeting points scheduled into calendars.

Ensure accessibility is built into communication plans so that accessibility needs are recognised. Remember that not all disabilities are visible, and so asking if adjustments are required should be a norm.

Be conscious of our bias when entering into partnerships, particularly when establishing close working relationships. While trust and good working relationships are part of successful partnership working, do not rely too heavily on informality and ensure there is transparency and clear documentation.

Liaise with senior leadership regarding their involvement at key points.

Ensure there is good communication between teams internally where there is a dependency to the smooth running of the partnership.

3 Problems and change

Establishing an open culture of shared accountability, especially one that reflects upon and learns from mistakes, will build open, honest and transparent working cultures. Creating safe spaces to explore problems is important. Problems are an expected aspect of partnership, and a culture of shared accountability for when things go wrong helps to manage risk, as issues are less likely to be hidden.

Change is an aspect of partnership. As noted earlier, the need for flexibility is important, and timelines should be adaptable where necessary. However unnecessary or excessive change can be debilitating. Annual reviews are good point to address the need for significant changes to the partnership (changes outside of those required for day-to-day operations), so that senior managers and leaders can be involved in the dialogue and decision-making.

It is also wise to have contingencies in place for staff turnover. Some partnership personal working relationships may continue for years which can be a great asset. However where a lot of responsibility or knowledge rests on specific individuals there should be extra efforts made to ensure transparency, so that the partnership can continue seamlessly even when people move to different job roles. Documentation and handover can help assist change management.

Factors to consider include:

Communicating changes to timelines or milestones is essential, so that all parties are working to the same expectations and can plan their workload accordingly.

Ensure all key documentation is up-to-date and accessible so that people delivering the partnership have access to it.

Involvement of external experts/ evaluators at key milestones in the project may mitigate the risk of problems developing.

4 Data, monitoring and evaluation

Monitoring, evaluation and 'ensuring positive impact' are key to the MCF Strategic Plan 2023-30 which commits the charity to placing 'a much greater emphasis on evaluation, leading the MCF to focus on areas where we can have the most impact and greater effectiveness'. However effective monitoring and evaluation requires agreement and clarity on how and when data will be collected, measured, used and shared. This should also be included in the communication plan.

Factors to consider include:

◆ What will success look like? Can this be achieved by the project outcomes?

◆ Are the objectives of the partnership clear, specific and measureable and have KPIs been agreed? This may particularly useful with service delivery partners. For example, if the partnership involves a counselling service developing KPIs in respect of contact and engagement will help assess how responsive the service is to need.

◆ How will data be shared whilst at the same time respecting UK GDPR obligations?

◆ How will data be collected and analysed? The MCF must understand the effectiveness of the partnership in the following ways:

◆ Reach - How far the partnership has extended its services geographically and by user profiles.
◆ Quality - Standard of excellence of the service offered.
◆ Resources - Amount of resources used to deliver the service.
◆ Impact - A positive outcome for beneficiaries of the service. This framework is flexible and can be adapted to service delivery partnerships.

◆ Who will be responsible for evaluating the achievements and impact of the partnership?

◆ Agree how often data will be reported and to which audiences. You might want to discuss creative ways to deliver the partnership's impact story.

5 Stakeholder and community engagement

Engaging with the Freemason community is likely to be a critical aspect of the partnership. The MCF places great value on engagement with Freemasonry and consulting beneficiaries in relation to the impact of grants, support and services we provide. Community engagement may also be considered through participatory approaches, such as the involvement of service users in working groups, or in direct decision making via steering groups.

◆ How will beneficiaries and the Freemason community be engaged in the feedback process as part of an engagement strategy?

◆ Could the partnership develop participatory approaches directly involving Freemason communities?

Stage 3 - Transitioning

Concluding partnership working, transition and review.

1 Planning for exit or transition

Some partnerships offer critical and ongoing support and services to MCF beneficiaries enabling the charity to meet our strategic goals. These partnerships require particularly robust transition strategies, and an overlap between service providers may be required. For example, any move away from service providers that offer services such as mobility equipment or access to mental health support require smooth transition in the continuity of service, to minimise the potential disruption for beneficiaries. Changes in service providers will require effective communication with key stakeholders as well as with beneficiaries. Working through potential problems in an open and honest way, without a culture of blame, will help as we transition to new service delivery arrangements.

Partnerships that are finite or time limited will require effective project closure. Moving on from partnerships with goodwill and the potential for future partnership working is important.

Factors to consider include:

◆ How will grant beneficiaries be affected when transitioning or exiting from a partnership?

◆ Hold an end of partnership meeting to discuss the partnership achievements, accomplishments and lessons learned.

◆ Thank partners for their cooperation and support.

2 End of partnership reporting

Final reporting is an opportunity to share the culmination and impact the partnership has had in terms of achieving its goals. These reports help to inform key stakeholders, including the Freemason community.

This level of reporting is less relevant for service delivery partnerships, although there should be some form of report stored for reference and to inform potential future partnerships.

◆ Agree format, scope and timescale for final reporting.

◆ Which audiences do the results need to be communicated to, and which partner will communicate with which audience?

◆ Be mindful of dates set in the Committee calendar so that results can be reported to Trustees. Having an item included on a Board agenda will require forward planning.

◆ What are the 'next steps' resulting from the report? Could the results be used as a foundation from which to build future work?

3 Learning for future partnership development

Learning what worked well and what did not are important internal reflections at the end of a partnership. They are ways to develop our own personal understanding, as well as a broader organisational understanding. On most occasions partnerships will represent success, but it may not have always been a smooth path and reflecting on this is useful practice. Having a document such as a learning log can help the process of reflection. The general culture should be one that views what didn't go as planned as opportunities for learning.

Factors to consider include:

◆ Consider a project closure report. This does not need to be lengthy, but it will help to remember key learnings that could get lost over time if not documented.

◆ Support the development of a culture of reflection.

References:

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NCVO (2018) Types of joint working agreement
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