Pathway to Partnership

INITIAL OUTREACH
Request an inquiry meeting with a potential partner and set expectations for the foundation’s approach to establishing partnerships

Evaluation and Learning Activity
Establish that the Foundation is interested in evaluation and learning alongside its community partners

FIRST INQUIRY MEETING
Establish a relationship with potential community partners and explore areas of potential partnership; communicate next steps the foundation might take to determine a fit for partnership

Evaluation and Learning Activity
Establish a baseline understanding within the team of the potential partner’s evaluation and learning capacities.

ADDITIONAL INQUIRY MEETINGS
Deepen the Foundation’s understanding of the potential partner’s fit among its portfolio

FIRST INQUIRY MEETING
Establish a relationship with potential community partners and explore areas of potential partnership; communicate next steps the foundation might take to determine a fit for partnership

Evaluation and Learning Activity
Initiate an initial conversation about shared evaluation and learning interests

ADDITIONAL INQUIRY MEETINGS
Deepen the Foundation’s understanding of the potential partner’s fit among its portfolio

TEAM REVIEW + FEEDBACK
Seek clarity from the potential partner on the details or intended outcomes of a partnership and advance the proposal towards decision

Evaluation and Learning Activity
Provide feedback on the proposal and draft initial evaluation and learning questions to ensure aligned interests

TEAM DECISION
Choose whether or not to fund a proposal through a deliberative and consensus-based process

Evaluation and Learning Activity
Decide whether or not to support additional evaluation and learning capacity within the partner organization and generate internal feedback on the direction of the partner’s 3 – 5 evaluation questions in the proposal

PARTNERSHIP KICK-OFF MEETING
Finalize the shared evaluation and learning questions between the Foundation and community partner

Evaluation and Learning Activity
Finalize the shared evaluation and learning questions between the Foundation and community partner and communicate the Foundation’s reporting expectations

ONGOING ENGAGEMENT
Observe and collect data toward answering the shared evaluation and learning questions

Evaluation and Learning Activity
Observe and collect data toward answering the shared evaluation questions

PARTNER ANNUAL REPORTING
Receive a formal update on the partnership and assess the impact of the foundation’s investment; identify new ways to support the partner

Evaluation and Learning Activity
Learn from the partner’s work to address the shared evaluation and learning questions and identify emerging evaluation questions

INTERNAL ANALYSIS + REPORTING
Communicate impact data and learning to the foundation team, trustees, and/or employees

Evaluation and Learning Activity
Pause, reflect, and improve the work of the foundation and communicate the foundation’s successes and learnings

PARTNERSHIP TRANSITION
Decide how the Foundation will move forward with a community partner at the end of an investment after capturing the lessons learned and consider how the Foundation proceeds with the partner

Evaluation and Learning Activity
Use evidence and learning from the implementation of the community partner’s work to extend, deepen, or scale the partnership

DUE DILIGENCE
Assess, analyze, and internalize what the Foundation has learned about how to move families towards our desired outcomes and identify how to engage new partners, deepen existing partnerships, or sunset existing partnerships

Evaluation and Learning Activity
Reflect on what the Foundation has learned and apply learning to current and future partnerships

PROPOSAL PHASE
Establish agreement between the Foundation and the potential partner about the scope of a potential Foundation investment, including supporting documentation (e.g., project budget and timeline, etc.)

Evaluation and Learning Activity
Develop a clear understanding of the potential partner’s evaluation and learning capacities and draft initial shared evaluation and learning questions

TEAM DECISION
Choose whether or not to fund a proposal through a deliberative and consensus-based process

Evaluation and Learning Activity
Decide whether or not to support additional evaluation and learning capacity within the partner organization and generate internal feedback on the direction of the partner’s 3 – 5 evaluation questions in the proposal

PARTNER ANNUAL REPORTING
Receive a formal update on the partnership and assess the impact of the foundation’s investment; identify new ways to support the partner

Evaluation and Learning Activity
Learn from the partner’s work to address the shared evaluation and learning questions and identify emerging evaluation questions

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Communicate impact data and learning to the foundation team, trustees, and/or employees

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Use evidence and learning from the implementation of the community partner’s work to extend, deepen, or scale the partnership