



Process Document: Partnering for Sustainability

Small local history museums are often limited by the resources immediately available to them, including facilities, funding, membership rosters, or board and staff time/expertise. Collaborations or partnerships with other organizations can enable museums to share resources, expertise, and connections; build upon existing organizational infrastructures; and expand reach to new communities and audiences. However, building a collaborative partnership requires commitment, planning, and foresight. Specifically, you will need to:

- Decide whether a partnership is right for you
- Identify potential partners
- Work with potential partners to determine whether a collaboration might be a good fit for both of you
- Establish a partnership that's set up for success
- Grow and maintain the relationship over time

This document provides a step-by-step guide to creating and maintaining a successful partnership between a small museum and one or more partnering organizations, including other museums, government agencies, educational institutions, and nonprofit organizations.

Both the board of directors and staff (whether paid or volunteer) of each partnering organization should be involved in this process.

All guidance contained in this document is based on best practices and case study examples. It is your responsibility to review and make sure you understand any applicable state or federal laws before beginning this process; please consult with a nonprofit attorney and/or accountant as needed.

1: Is a Partnership Right for You?

A partnership between two organizations only makes sense if it benefits both of you in some way and if you are both willing to work together collaboratively and with mutual respect. Specifically, a partnership should help you both meet your individual goals. Here are some examples of partnerships between museums and other organizations in their communities.

- If your organization wants to reach a segment of your community with which you have previously not engaged, you might look for a potential partner who can help you reach that part of the community to find out what they want, need, or would like to know about your organization. You can then work together to create new programming that speaks directly to that audience. For example, a museum in Aspen, Colorado, partnered with the Spanish-language radio station there to develop Spanish-language tours and

educational programming and promote family activities at the museum. This collaboration met both organizations' mutual goals of removing barriers to access and designing community-driven programming that responded directly to the interests of that city's rapidly growing Hispanic population.

- Perhaps your staff, board, or volunteers might be trying to develop specific skills that you could learn from another organization. A museum-school partnership could help your staff learn to create more effective educational programming that meets academic standards, develop lesson plans, or implement digital collections with an educational component. School groups can also help a museum evaluate a pilot program or work with the museum to seek grant funding for mutually beneficial programs.
- Sometimes partnerships can begin as temporary arrangements that have longer-lasting benefits. For example, a museum in Miami, Florida, closed for two years in order to expand and reconfigure the programmable space at its existing location. While that facility was closed, the museum partnered with the local public library to present exhibits and educational programming. The library also offered meeting and office space to museum staff and promoted the museum's co-located programs to their patrons and email list. Both the museum and the library benefited from new visitors while sharing the library's space.

Your organization should also define what you would consider a *successful* partnership. Is your definition of success one-sided (focused on your organization only) or does it include your partner(s) and their needs? Be sure to consider what your organization has to offer — and confirm that your board and staff are willing to reciprocate.

To-Do List

In order to determine whether partnering might make sense for your organization, start by answering the following questions.

- What are our goals?
- Which of those goals are currently not being met? Why not?
- Could a partner help us meet those goals? How?
- What does our organization have to offer a partner that might help them meet *their* goals?

2: Identify Potential Partners

Begin the process of identifying potential partners by considering the geographic area in which such organizations would be located. Most partnering organizations are relatively close to one another — in the same city or within the same neighborhood. It may be helpful to create a map of your local area (however you define that) that identifies all of the potential partners that are located within that area, in relation to your museum. This can help you more easily see possible

connections, as well as recognize needs for transportation between partnering institutions.

For each potential partner, conduct initial research to learn more about their mission, programs, and staff.

1. Start by determining if they are already doing something similar to what you want to do. If so, consider whether you really need to create a new program, or if you could instead work with that organization to access their existing programming.
2. Identify their target audience and what they are trying to achieve. Does that align with your goals in any way? If so, how?
3. Consider whether any themes could connect your organizations in support of your mutual goals. For example, the New Bedford (Massachusetts) Whaling Museum partners with local public schools and universities as part of a city-wide initiative to *improve high school graduation rates*. The Museum selects low-income, academically motivated participants to join their three-year High School Apprenticeship program, which focuses on connecting students to the history of the local community while developing college readiness skills that also position participants for career success. Apprentices have an impressive 100% rate of graduating from high school and 94% have gained admittance to higher education. The Apprenticeship program continues to support a successful transition into the first year of college.
(<https://www.whalingmuseum.org/learn/opportunities/apprenticeship>)

To-Do List

- Create a community map that shows potential partners and their locations in relation to your museum.
- Research individual partners' mission and audience. Which organizations have goals similar to what you are trying to achieve?
- Make a list of potential partners and your ideas about how you might work together.

3: Evaluate the Fit

If it looks like the organization might be a potential partner, and you have a clear idea of your goals, what you can offer, and how you might work together, it's time to contact that organization and arrange a meeting. You will need to identify the right person to talk with, if your research has not already done so. For smaller institutions, that might be the executive director or similar leader; for larger organizations, you may want to contact the person who would most likely be your counterpart.

During your initial meeting, you should:

- Present your ideas for a possible collaboration. Make sure you can clearly articulate your tentative expectations for what both parties would contribute.

- Keep an open mind and be flexible. Your potential partner will have their own ideas about what they need or can contribute and how this might work.
- Identify the decision-makers in both organizations. Who needs to approve this collaboration before it can go forward? What information will they need in order to make that decision?
- Determine whether you both want to continue pursuing a potential partnership, and if so, agree on next steps, such as planning a pilot version of the program in which you're interested and discussing how you'll evaluate that effort and whether/how to continue and improve it.

You will probably need multiple meetings with various members of both organizations in order to work out the details of your collaboration as well as the tentative division of roles and responsibilities.

To-Do List

- Identify the appropriate person to contact at the potential partner organization, introduce yourself to them, and (if they're interested) schedule a meeting.
- Prepare for the meeting by assembling any information that might be useful to the person with whom you're meeting, as well as other decision-makers in the organization. This information should include a description of your idea, how you think it might work, and the potential benefits for both organizations.
- During the meeting, establish a process for moving forward (if desired), including engaging decision-makers and outlining next steps.
- After the meeting, write a summary of what happened and share that with the person with whom you met, to ensure that you both came away with the same understanding of what happened and what you'll do next.

4: Formalize the Partnership

It is always in your best interest to document, in writing, the agreements that you make with your partners. This protects the partnership against personnel changes at the board and staff levels in both organizations, and importantly, helps to set and manage expectations. A memorandum of agreement (MOA) is a written agreement that documents the terms and details of a cooperative relationship. It is a legal document, but less formal than a contract. The act of writing an MOA also can help you and your partner identify decisions that need to be made that you might not have thought about during your earlier discussions.

Note: A memorandum of understanding (MOU) is similar to an MOA but is not legally binding; it does not commit either party to any specific action. Because an MOU generally does not include any financial agreements, it is probably not appropriate for most of the partnerships that a museum might pursue.

A successful MOA is:

- Positive, using language that focuses on what each partner will do, rather than what they will not do.
- Realistic; each partner should review the terms carefully to make sure that they can accomplish what they've agreed to do.
- Complete, clear and concisely written. Keep it simple and specific.
- Fair and balanced, with an equitable distribution of both benefits and responsibilities between the partners.

To-Do List

- Assemble all of your notes and other information from meetings with your partner.
- Determine who in your organization has the authority to sign the MOA.
- Either in person or separately, work with your partner to draft an MOA containing the following information:
 - A statement establishing who in each organization has the authority to enter into the agreement (e.g., the board president, executive director, board of directors, or executive committee) and contact information for the primary point of contact at each organization.
 - The purpose of the agreement.
 - The time period for which the agreement will be in effect.
 - The scope of the project, program, or other collaborative activity. This should spell out what is included, as well as what is not included.
 - The division of roles and responsibilities between the partnering organizations.
 - A statement of the financial obligations of each partner (what funds they will contribute, if anything) as well as the division of any proceeds, who will manage the finances, and how financial reporting and payments to the other partner will be handled.
 - A process for terminating or changing the agreement.
 - A place for signatures for the appropriate person(s) at each organization.
- If desired, work with a qualified nonprofit attorney who can help you finalize the content of the MOA.
- Separately, review the draft with decision-makers in your organization, and continue to revise and review as needed, until everyone is happy with the resulting document.
- Secure board approval for the final MOA and have the appropriate person in your organization sign it.
- Provide an original signed copy to each partner for their files.

A sample MOA (courtesy of <http://www.strengtheningnonprofits.org/>) is provided at the end of this document.

5: Grow and Maintain the Relationship

Your partnership is likely to evolve over time. Plan to include regular checkpoints in your project schedule that allow you time to reflect on what is working as well as areas that could be improved. You will benefit from internal assessments with staff and board members, as well as external evaluations with participants, stakeholders, and other members of the community.

If the initiative is not working out the way you expected, don't be afraid to make changes or — if necessary — end the project altogether. In any case, joint debriefing will help you improve your work and be more successful going forward.

Some keys to a successful long-term collaboration include:

- Open and honest communication, including regular check-ins to review plans, coordinate activities, and update each other on the status of your individual activities.
- Transparency leads to trust. If you have any concerns or encounter a problem, let your partner know right away. Also, make sure that you are keeping your own organization informed, especially about problems or delays.
- Build regular evaluation and opportunities for feedback into your project schedule. Make sure you include sufficient time to consider and respond to feedback.
- When, inevitably, you do run into obstacles, be sure to identify and address them right away *as a team*.
- Maintain a positive attitude.
- Be willing to make changes. For example, if you thought you were dividing the work equitably, but once you begin, one partner feels like they are putting forth most of the effort, have a conversation about how you can work together to change that.
- No matter what happens, be sure to celebrate your successes and maintain a positive relationship with your partner, so that you can continue to work with them in the future.

6: Make the Partnership Permanent with a Merger

In some cases, museums and their partners will want to move beyond the partnership model to join forces permanently. For example, the Maine Maritime Museum (Bath, Maine) merged in 2010 with the smaller, struggling Portland Harbor Museum (Portland, Maine). The Portland museum's collection, which had been located in an unconditioned former machine shop at what is now the Southern Maine Community College campus, was moved to the Maritime Museum's climate-controlled facility. With no facility to manage, the Portland Harbor Museum is now able to focus on its strengths, including delivering programs on the history of Casco Bay and the Liberty Ship construction program and mounting special exhibitions in the public display area of the new Portland public library. The Maine Maritime

Museum gained a presence in the state's largest city. Both museums have benefited from the merger.

Other Examples:

The **New Bedford Whaling Museum (New Bedford, Massachusetts)** and its High School Apprenticeship Program transform the lives of youth in its community. The program (<https://www.whalingmuseum.org/learn/opportunities/apprenticeship>) provides low-income, academically motivated students with access to resources and experiences that deepen community engagement, promote personal and professional development, and cultivate college and career success. The museum was founded in 1903 as a program of the Old Dartmouth Historical Society; the area once known as Old Dartmouth now includes the cities of New Bedford, Acushnet, Dartmouth, Fairhaven and Westport, Massachusetts, with a population of more than 180,000. The Apprenticeship Program began in 2010, in response to a citywide initiative to improve high school graduation rates. New Bedford, once the richest city in America, is now economically disadvantaged; nearly 30% of the population does not have a high school diploma, and only 20% of its residents have a college degree. Meanwhile, 100% of Apprentices have graduated from high school and 94% have gone on to post-secondary schools.

The French Quarter Museum Association (New Orleans, Louisiana) (<https://www.frenchquartermuseums.com>) is a network of seven unique cultural and historical museums that tell diverse stories from all corners of New Orleans' oldest neighborhood. The mission of the FQMA is to make museum-going an integral part of the French Quarter experience by working together to create shared experiences throughout the Quarter.

The Austin Museum Partnership in Austin, Texas, (<http://www.austinmuseums.org>) is a standalone 501(c)(3) organization that promotes and facilitates collaboration within the museum community for the benefit of our museums and the community at large. Since 1998, the Austin Museum Partnership has coordinated Austin Museum Day, an annual community event which offers free admission and includes special programs and activities at art, history, and science museums and cultural institutions across a seven-county area around Austin, Texas. Government agencies including the City of Austin Cultural Arts Division, University of Texas, and Texas State Capitol are among the 70 members of the Partnership.

The Novato Historical Guild (Novato, California) is a volunteer nonprofit organization founded in 1976 to staff and financially support the Novato History Museum and the Hamilton Field History Museum. The Guild has a partnership agreement with the City of Novato: the City owns the Museum buildings and the historical collections, and the Guild makes sure the Museums are open to the public, as well as are educational, inviting, and safe places to visit. The Guild hosts quarterly membership meetings,

which usually involve guest speakers on local history topics, and publishes *The Novato Historian*, a quarterly newsletter.

For More Information:

The following publications were valuable sources that informed this document.

Jennifer Elliott, “To Infinity and Beyond: Museum-School Partnerships Beyond the Field Trip,” Thesis, M.A. Museum Professions, Seton Hall University, May 2012.

Sarah Erdman, “Creating Meaningful Partnerships with Museums,” National Association for the Education of Young Children, *Young Children*, March 2016, Vol. 71, No. 1.

<https://www.naeyc.org/resources/pubs/yc/mar2016/creating-meaningful-partnerships-museums>

Brian Feriso, ed. *Next Practices in Partnerships*, Association of Art Museum Directors, 2017.

<https://aamd.org/our-members/from-the-field/next-practices-in-partnerships>

Beth Maloney and Matt D. Hill, “Museums and Universities: Partnerships with Lasting Impact,” *Journal of Museum Education*, Vol. 41, No. 4, pages 247–249.

<https://doi.org/10.1080/10598650.2016.1235814>

Museums Association

<https://www.museumsassociation.org/collections/collections-learning/partnerships>

Sample Partnership Agreement Memorandum of Agreement

ABC NONPROFIT
AND
CDF GRASSROOTS

This document describes the agreed-upon responsibilities and expectations between ABC NONPROFIT (Lead Organization) and CDF GRASSROOTS ORGANIZATION (FBCO Partner) for the use of funds received through the U.S. Department of Health and Human Services (HHS) Compassion Capital Fund (CCF) Communities Empowering Youth (CEY) Demonstration Program for the HOPE AND LIFE PARTNERSHIP. The purpose of HOPE AND LIFE PARTNERSHIP is to build OUR capacity to address youth violence issues in our community.

ABC NONPROFIT is partnering with CDF GRASSROOTS ORGANIZATION along with nine other local groups through this project. This project contains three components: (1) community assessment; (2) training and technical assistance; and (3) the distribution of grant funds to partnering organizations to implement their individual capacity building plans.

RESPONSIBILITIES AND EXPECTATIONS

For this project ABC NONPROFIT serves as the “lead” organization. As the lead organization, ABC NONPROFIT is responsible for the following:

- Ensuring the program activities and finances of the HOPE AND LIFE PROJECT are in compliance with CEY requirements and federal regulations
- Serving as the coordinator for the community assessment and evaluation activities for HOPE AND LIFE PARTNERSHIP
- Providing support in the development of individual technical assistance plans for each partnering organization
- Distributing up to \$50,000 to each partnering organization to implement their individual capacity building plans
- Designing a comprehensive training program for all partnering organizations
- Reporting HOPE AND LIFE PARTNERSHIP activities and accomplishments to HHS

Under this Agreement, CDF GRASSROOTS ORGANIZATION agrees to:

- Send a management level staff person to all HOPE AND LIFE PROJECT planning meetings
- Complete an organizational assessment to determine the priority capacity building needs for their organization
- Develop a detailed capacity building plan along with expected outcomes
- Participate in the HOPE AND LIFE PROJECT community assessment
- Participate in all HOPE AND LIFE PROJECT trainings

- Provide quarterly reports to ABC NONPROFIT on the use of project funds through HOPE AND LIFE PROJECT using format in Attachment A
- Comply with all appropriate local, state, or Federal laws and regulations regarding the use of funds provided through the HOPE AND LIFE PROJECT
- Participate in all evaluation activities required by Federal agencies funding this project
- Submit a final report at the end of the grant period listing the major accomplishments and outcomes for your capacity building project
- Not use any of the funds from this project to support inherently religious activity such as religious instruction, worship, or proselytizing.
- Not use any of the funds from this project to contract with another organization receiving funds from the Compassion Capital Fund without submitting a request to ABC NONPROFIT that will be forwarded to the federal agency sponsoring this grant program

DISBURSEMENT OF PROJECT FUNDS

In order to receive project funds from ABC NONPROFIT for the implementation of the capacity building plan, CDF GRASSROOTS ORGANIZATION must submit a monthly invoice for reimbursement of costs associated with the project. The invoice should include a description of expenditures for the project along with the cumulative costs for the project to date. Within five business days, ABC NONPROFIT will disburse the requested funds to CDF GRASSROOTS ORGANIZATION. The final invoice for all project expenses should be submitted within 15 days after the end of the project (October 1, 2009). In order to receive final payment, CDF GRASSROOTS NONPROFIT must submit a final project report indicating how the funds were used, itemizing the amount of funds used on the specific technical assistance areas outlined in the original technical assistance plan. The report should also include a summary of the outcomes and accomplishments associated with CDF GRASSROOTS NONPROFIT's project.

All invoices shall be forwarded by e-mail to info@abc.org or by regular mail to:

ABC Nonprofit Organization
 Attn: Hope and Life Project
 1254 Any Street
 Washington, DC 22222

TIME PERIOD

This Memorandum of Agreement shall remain in place from October 1, 2006 through September 30, 2009 unless modified in writing before that date.

TERMINATION

This Agreement may be terminated in whole or in part by either party without cause. Written notice of termination shall be given in writing to both ABC NONPROFIT and CDF GRASSROOTS ORGANIZATION and shall be sent via certified or registered mail with return receipt requested. Failure to honor any of the obligations stated above may also result in the termination of this Agreement.

Signatures of authorized agency representatives:

Attachment A

Sample FBCO Partner Reporting Form

Reporting Date: November 17, 2007
Organization Name: CDF GRASSROOTS ORGANIZATION
Project Budget: \$50,000
Funds Used to Date: \$25,000

Brief Overview of the Capacity Building Plan: CDF GRASSROOTS ORGANIZATION is using the funds for this project to increase the effectiveness and efficiency of its fundraising efforts. This includes hiring a fundraising consultant to review previous proposals, help develop a fundraising plan for the organization, review overall fundraising costs, and train our board of directors in grassroots fundraising strategies.

Summary of Activities Since Previous Reporting Period: During this past quarter we have completed our fundraising plan, and it is currently being reviewed by the recently established fundraising committee on the board. Our fundraising consultant has also reviewed and provided feedback on the content of recent fundraising proposals for foundations and government agencies. Our funds were used to pay our fundraising consultant (see invoice attached) and to purchase software to keep track of potential individual donors (receipt included).

Please attach any invoices or copies of receipts for purchases made with this funding.