PARTNERSHIP DEVELOPMENT TOOLKIT

Created by Solvera Consulting in partnership with RPB

How to Use This Toolkit

Preparing for and establishing relationships to support client coordination.

Toolkit Overview

This toolkit is designed to guide your agency through identifying a client need, defining a desired outcome, and clearly articulating a partnership ask. Use it to think through what you need, what you can offer, and how to structure a strong, mutually beneficial collaboration. You can adapt any of these tools to fit your agency's unique needs and workflow.

✱ Tools with this symbol may be particularly helpful for those in leadership positions.

Toolkit Goals

Users will be able to:

- Confidently assess client/agency needs and partnership readiness
- Develop and communicate clear asks
- Create referral pathways to improve client support
- Establish and strengthen partnerships

Toolkit Index

1 Determining Your Ask

Clarifying needs, outcomes, and goals to guide effective collaboration.

1. Identify the Need

What gap in services or resources are clients experiencing?

Top client need: ______________________

Tip: Be specific. Avoid broad answers like "housing" or "support." Focus on what *is not working* for clients right now (delays, barriers, gaps).

Example: Clients are waiting 4+ weeks for mental health services after intake.

2. Define the Outcome

What would success look like if this gap was addressed?

Desired outcome: ______________________

Tip: Describe what success looks like for the client, not just the service. Think in terms of timelines, access, or improved experience.

Example: Clients are connected to mental health services within 7 days of intake.

3. Determine Your Ask

What exactly do you want from a partner?

Your ask: ______________________

Tip: Be clear and actionable. Your ask should describe exactly what you want a partner to *do*; avoid vague language like "collaborate" or "support."

Example: We are seeking a mental health provider who can accept 5-10 referrals per month and provide intake appointments within one week after referral.

1 Determining Your Ask

Clarifying needs, outcomes, and goals to guide effective collaboration.

4. Identify What You Can Offer

Partnerships work best when they are mutually beneficial.

We can offer: ______________________________

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Tip: Strong partnerships are mutually beneficial. Clearly state the value you bring. Think about referrals, visibility, or shared expertise.

Example: We can provide consistent referrals, share client background information to support intake with client release of information, and promote partner services through our case management team and community events.

5. Create Your Partnership Ask

How are you going to communicate your ask?

Your partnership ask: ______________________

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Tip: Combine your need, outcome, and mutual value into one clear, concise statement you can use in conversation or outreach.

Example: We are looking for a mental health partner who can accept referrals from our case managers and provide an intake within one week; while we are able to offer consistent referrals and support client engagement through ongoing case management.

A Strong Ask Includes:

- A clear client need
- A specific action from the partner
- A realistic scope (numbers, timelines, etc.)
- Mutual value for both organizations

2 Partnership Checklist

Guiding your agency through identifying, vetting, and structuring partnerships.

1. Define the Need

☐ Conduct an **internal gap analysis**

- List services or resources clients need that you cannot fully provide in-house.
- Prioritize the top 3–5 highest-impact needs.

☐ Clarify your **"ask"**

- Write a concise statement of what support you need (e.g., expertise, funding, in-kind, referrals).
- Note what you can offer in return (e.g., volunteer support, training, co-branding, data insight).

2. Brainstorm Potential Partners & Outreach

☐ Use SupportGuide.org to identify and prioritize potential partners in your service area:

- Highest client need
- Most aligned or likely to positively respond

☐ Identify concrete contact methods and follow up steps:

- Cold outreach (email, phone scripts)
- Warm introductions (network referrals, community events)
- Digital platforms (e.g., SupportGuide listings, LinkedIn)

☐ Prepare outreach materials:

- One-page partnership brief
- "Ask" statement with bullet benefits for partner

3. Initial Vetting Questions

☐ **Mission Alignment:**

- Do their mission, values, and client base overlap with yours?
- Do their social platforms and other public-facing information align with your values?

☐ **Capacity & Expertise:**

- Do they have the bandwidth to deliver?
- Do they have the track record to deliver?

☐ **Standards & Past Performance:**

- Do they have written, existing non-discrimination, confidentiality, and data-privacy agreements in place?
- What are their current operations like?
- Can they share examples of similar work or referrals from past partnerships?

Partnership Checklist

Guiding your agency through identifying, vetting, and structuring partnerships.

4. Structuring the Partnership

- ☐ Co-create a **working agreement** that is mutually beneficial.
- ☐ Define **Roles & Responsibilities**
  - Use a RACI or "All on the Same Pager" matrix: Canva Templates, Miro Templates
- ☐ Agree on **Communication Cadence**
  - Frequency (weekly, bi-monthly check-ins)
  - Channels (email updates, shared dashboards, in-person meetings)
- ☐ **Data & Privacy**
  - What client data will be exchanged?
  - How will data be protected?
  - Whose release of information form will clients sign to make data sharing possible?
  - Confirm HIPAA/COPPA compliance and/or local privacy laws.
- ☐ **Quality & Evaluation Metrics**
  - Define how success will be measured (referral volume, client outcomes).
- ☐ **Risk Management**
  - Identify potential risks (service gaps, funding shortfalls) and mitigation plans.

5. Final Review & Sign-Off

- ☐ Conduct a **joint kick-off meeting.**
  - Review shared goals, roles, timelines, and metrics together with all relevant agency staff to ensure alignment, shared understanding, and expectations.
- ☐ Secure **executive agreement** regarding the partnership for helping coordinate client care.
- ☐ Distribute a **shared project roadmap** (key milestones, dates).

Keep this checklist handy at each stage of your outreach and implementation to build strong, sustainable community partnerships that amplify impact—without losing clarity or momentum.

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Partnership Checklist

Guiding your agency through identifying, vetting, and structuring partnerships.

Task Name	Description	Owner	Due Date	Status
Define the Need				
Conduct an internal gap analysis	Analyze internal service gaps to determine unmet client needs.			
List needed services or resources	Identify services/resources clients need that cannot be fully provided in-house.			
Prioritize top needs	Select and prioritize the top 3–5 unmet needs with the most impact.			
Write support statement	Draft a clear statement of support needed (expertise, funding, in-kind, referrals).			
Brainstorm Potential Partners & Outreach				
Note reciprocal offerings	Document what your agency can offer in return (volunteer support, training, co-branding, data insights).			
Identify potential partners	Use SupportGuide.org to find and prioritize partners based on client needs and alignment.			
Determine cold outreach methods	Prepare email and phone script templates for initial cold outreach.			
Plan warm introductions	Map out network referrals and community events for warm introductions.			
Prepare one-pager	Create a concise brief summarizing the partnership opportunity.			
Develop ask statement	Craft bullet-pointed benefits for partners alongside the ask statement.			
Internal Vetting				
Assess mission alignment	Evaluate potential partner's mission, values, and client base for alignment.			
Review public-facing information	Check partner’s social media and public materials for value alignment.			
Evaluate capacity & expertise	Determine partner's bandwidth and track record to deliver.			
Verify standards & agreements	Confirm non-discrimination, confidentiality, and data-privacy agreements are in place.			
Examine current operations	Understand partner’s operational processes and workflows.			
Request examples/referrals	Ask for case studies or referrals from past partnerships.			

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Partnership Checklist

Guiding your agency through identifying, vetting, and structuring partnerships.

Task Name	Description	Owner	Due Date	Status
Structuring the Partnership				
Co-create working agreement	Collaborate on a mutually beneficial partnership agreement.			
Define roles & responsibilities	Use a RACI or 'All on the Same Pager' matrix to assign tasks.			
Set communication cadence	Set frequency (weekly, bi-monthly) and channels (email, dashboards, meetings).			
Establish data protocols	Determine what client data is exchanged, protection measures, and release forms.			
Confirm legal compliance	Ensure HIPAA/COPPA or local privacy laws are addressed.			
Define evaluation metrics	Set success metrics (referral volume, client outcomes).			
Identify risks & mitigation plans	List potential risks and create mitigation strategies.			
Final Review and Kick Off				
Secure executive sign-off	Obtain executive agreement on partnership plan and client care coordination.			
Conduct kick-off meeting	Host meeting with all relevant staff to foster alignment on goals and timelines.			
Review project roadmap	Distribute roadmap with key milestones, dates, and responsibilities.			

3 Partnership Readiness Assessment

Assessing internal capacity to build and sustain effective partnerships.

1. Readiness Assessment Scale

Use the following statements to assess your agency's readiness to pursue a partnership. Rate each statement based on your level of agreement.

Partnership Readiness Statement	Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
We understand our client service gaps.	1	2	3	4	5
We know what we are asking partners for.	1	2	3	4	5
Staff know how to make referrals.	1	2	3	4	5
We have a process for tracking referrals.	1	2	3	4	5
Leadership supports partnerships.	1	2	3	4	5
We have staff responsible for partnerships.	1	2	3	4	5
We have confidentiality/data sharing policies.	1	2	3	4	5

How you respond to each statement will help you better understand what areas within your agency would benefit from additional support or structure before developing external partnerships.

Use the **reflection questions** on the **following page** to continue assessing readiness.

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Partnership Readiness Assessment

Assessing internal capacity to build and sustain effective partnerships.

2. Reflection Questions

What areas need improvement before forming partnerships?

What internal systems need to be developed?

Who will lead partnership management?

4 Referral Outreach Templates

Making it easier to start conversations that lead to real collaboration.

Pre-Outreach Checklist

- [ ] Clearly defined your **partnership ask.**
- [ ] Identified how the partnership would benefit both organizations.
- [ ] Reviewed the partner organization's **services and mission.**
- [ ] Identified the **appropriate contact person.**
- [ ] Prepared a short explanation of your organization and services.
- [ ] Identified potential **referral opportunities** between agencies.
- [ ] Determined your **desired next step** (meeting, referral discussion, collaboration).

Template List

1. Initial Outreach Email
2. Phone Call Script
3. Follow-Up Email
4. Thank You/Next Steps Email

These templates can be adapted to match your organization's tone, services, and community partnerships.

Outreach Tip

Strong partnerships start with clear communication.

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Referral Outreach Templates

Making it easier to start conversations that lead to real collaboration.

1. Initial Outreach Email

Subject: Exploring a Referral Partnership – [Your Organization Name]

Dear **[Name]**,

My name is **[Your Name],** and I work with **[Your Organization]**, an organization that supports [brief description of population served].

We are currently looking to strengthen our referral partnerships with organizations that provide **[service type]**, and your organization came highly recommended.

We believe there may be an opportunity for our organizations to collaborate to better support individuals and families in our community.

I would welcome the opportunity to schedule a brief call or meeting to learn more about your services and discuss how we might coordinate referrals between our organizations.

Please let me know if you would be available for a short conversation in the coming weeks.

Thank you for the work you do in our community.

Best regards,

[Name]
[Title]
[Organization]
[Phone]
[Email]

Outreach Tip

Use one short paragraph to explain your mission and one paragraph to explaining the partnership opportunity. Long emails are less likely to receive a response.

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Referral Outreach Templates

Making it easier to start conversations that lead to real collaboration.

2. Phone Call Script Template

Hello, my name is **[Name]**, and I'm calling from **[Organization]**.

We work with **[brief description of population served],** and we are looking to build referral partnerships with organizations that provide **[service type]**.

I wanted to reach out to learn more about your services and explore whether there may be opportunities for collaboration or referrals between our organizations.

Would there be someone on your team who would be the best person to speak with about partnership opportunities?

<u>If appropriate:</u>
Would you be open to scheduling a short call or meeting to discuss how we might support clients together?

Thank you for your time today.

Outreach Tip

Phone calls work best when you:

- Call **mid-morning or mid-afternoon**.
- Follow up with an **email summarizing** the conversation.
- Ask for a **specific next step**.

4

Referral Outreach Templates

Making it easier to start conversations that lead to real collaboration.

3. Follow-Up Email Template

Subject: Follow-Up: Referral Partnership Opportunity

Dear **[Name]**,

I wanted to follow up on my previous message regarding a potential referral partnership between **[Your Organization]** and **[Their Organization]**.

Our team is interested in learning more about your services and exploring how we might collaborate to better support clients in our community.

If you are available, I would appreciate the opportunity to schedule a brief conversation at your convenience.

Thank you again for the important work your organization is doing.

Best regards,

[Name]
[Title]
[Organization]
[Phone]
[Email]

Outreach Tip

Most outreach requires **2–3 attempts** before receiving a response. A polite follow-up significantly increases response rates.

4

Referral Outreach Templates

Making it easier to start conversations that lead to real collaboration.

4. Thank You/Next Steps Email Template

Subject: Thank You – Partnership Conversation

Dear **[Name]**,

Thank you for taking the time to speak with me about the work your organization is doing and the possibility of building a referral partnership.

We appreciate the opportunity to learn more about your services and explore ways our organizations can work together to better support our community.

As discussed, the next steps include:

- **[Example: sharing referral information]**
- **[Example: connecting staff teams]**
- **[Example: scheduling a follow-up meeting]**

We look forward to continuing the conversation and strengthening collaboration between our organizations.

Best regards,

[Name]
[Title]
[Organization]
[Phone]
[Email]

Partnership Outreach Best Practices

✔ Keep outreach messages **short and focused.**
✔ Highlight **shared community impact.**
✔ Focus on **mutual benefits.**
✔ **Document outreach** for partnership tracking.
✔ **Maintain relationships** even when referrals are not immediate.

5 Referral Pathway Planning

Turning connections into clear, actionable referral processes.

Service Gap	Potential Partner	Contact	Referral Process	Next Step	Owner
Housing Navigation	*Belmont Housing*	*Julie Gonzalez*	*Submit Form via Online Portal*	*Need to set up follow-up meeting to understand their capacity.*	*K.P.*

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Top 10 Partnership Questions

Helping you ask the right questions to build aligned partnerships.

Top Questions to Ask Potential Partners

1. What populations do you primarily serve?
2. Are there any eligibility requirements for your services?
3. What types of referrals are most helpful to you?
4. What does your referral process look like?
5. What information is helpful when sending referrals?
6. Who should staff contact about referrals?
7. How quickly can clients typically access services?
8. What services do clients most often need after working with you?
9. Are there services you wish more partners referred to you?
10. What partnerships have worked best for your organization?

Partnership Tip

The best partnerships come from **mutual referrals**, not one-direction referrals.

7 Additional Resources

Offering tools and insights to strengthen collaboration and impact.

Resources on Partnership and Collaboration

The **Provider Directory** on **Support Guide** is always a great starting point for referrals, connections, and partnership building. You can search for service providers by location, service type, or population served.

Support Guide
Building Bridges: Collaboration for Coordination Webinar

Welcoming America
Community Engagement Toolkit

Switchboard
Building Community Partnerships Across the Resettlement Landscape

"If you want to go fast, go alone. If you want to go far, go together."
—African Proverb

Positive Partnerships Fuel Brighter Futures for Everyone

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