Partnership Dynamics in Community-Based Development Organizations

by ThirdSpace Action Lab for the Community Opportunity Alliance

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Introduction and Acknowledgments

Community Opportunity Alliance, in partnership with ThirdSpace Action Lab, initiated this research project to deepen understanding of how community-based development organizations can increase equity and balance in partnerships.

This work draws from in-depth interviews with leaders and staff from three community-based development organizations (CBDOs) representing different geographic contexts: rural, small metropolitan, and large metropolitan. The present publication distills key themes about how CBDO partnerships form, what makes them mutually beneficial, how organizations navigate power dynamics, and what sustains partnerships over time despite resource constraints.

We are deeply grateful to the organizational leaders and staff who generously shared their time, experiences, and insights for this research. Their candid reflections about both successful partnerships and those that didn't work illuminate critical lessons for the field.

This brief is offered as a contribution to ongoing field dialogue about how to build community development infrastructure that genuinely serves communities rather than institutional interests.

This brief is offered as a contribution to ongoing field dialogue about how to build community development infrastructure that genuinely serves communities rather than institutional interests. Community Opportunity Alliance and ThirdSpace Action Lab view this as a part of broader work to shape a community development sector that centers racial equity and community power in practice.

Executive Summary

Community-based development organizations cannot work in isolation. The interconnected nature of community challenges requires collaborative responses that bring together complementary expertise, resources, and constituencies. Yet partnerships are simultaneously essential and difficult, requiring operational capacity, sustained resources, and careful navigation of power dynamics that many organizations struggle to maintain.

Through interviews with organizational leaders and staff across three contexts, we found that successful partnerships require specific conditions often absent in the current funding and policy environment.

Partnerships form in response to critical needs, gaps, and opportunities.

Organizations described partnerships emerging from immediate threats requiring collective response, recognition of gaps that no single organization can fill, and strategic opportunities to accomplish shared goals. The most durable partnerships combined crisis-driven urgency with longer-term strategic alignment.

Mutual benefit requires both operational and financial alignment.

As one leader stated, "Foundations want every nonprofit to partner with everybody, but boards want people to execute the mission, and so it has to be mutually beneficial." Organizations described partnerships failing not because of bad intentions but because capacity mismatches made execution impossible. A capacity mismatch occurs when one partner cannot deliver what they promise due to staffing limitations, system constraints, or expertise gaps. As an example, a service organization may lack sufficient staff to keep pace with referrals from a housing partner. Organizations described instances of partnerships faltering when expected grant funding for staffing expansion didn't materialize, making continued collaboration unsustainable despite conceptual alignment.

Infrastructure enables partnerships to function effectively.

Successful partnerships require regular convening spaces, coordinated staff time, shared data systems, and relationship-building resources. However, this infrastructure competes with service delivery for scarce resources, and funding structures rarely support the coordination work that makes partnerships possible. Funding for this infrastructure typically comes from three sources: dedicated collaborative grants that explicitly fund coordination work, organizational general operating funds that subsidize partnership participation, or resource savings generated through collaboration that offset coordination costs. Yet most partnerships struggle to secure consistent funding from any of these sources.

Power dynamics shape partnership experiences.

Size differences, racial dynamics, and resource disparities affect partnership functioning in ways requiring explicit structural attention, not just goodwill. Structural attention means creating concrete mechanisms to address power imbalances—such as providing stipends so smaller organizations can afford partnership participation, rotating meeting facilitation and decision-making authority, establishing explicit protocols for how funding gets distributed among partners, and creating accountability mechanisms when larger partners fail to honor commitments. Without these structural interventions, partnerships reproduce existing inequities even when all parties hold good intentions.

Resource scarcity is both a barrier and motivator.

Financial constraints prevent adequate partnership coordination while simultaneously motivating collaboration by clarifying that no single organization can address comprehensive community needs alone. The pandemic illustrated this tension: Organizations scaled back collaborative work to survive financially but also formed new coalitions to collectively advocate for resources.

Strategic discipline about partnership focus matters.

Organizations successfully managing multiple partnerships had clear frameworks for deciding which partnership opportunities to pursue and which to decline, recognizing that not every collaboration opportunity serves their mission or community.

Findings and Insights

The following sections explore what we learned about partnership dynamics from organizational leaders and staff. We examine how partnerships form, what conditions enable them to function effectively, how organizations navigate power dynamics, and what makes partnerships sustainable over time. Throughout, we illustrate findings with examples from organizations working in rural, small metropolitan, and large metropolitan contexts.

UNDERSTANDING PARTNERSHIP TYPES AND WHAT THEY DO

Before exploring partnership dynamics, it helps to clarify what we mean by partnerships and the different forms they take. In this research, we use "partnership" broadly to describe any sustained collaborative relationship between organizations working toward shared goals. This includes:

- **Coalitions:** Groups of organizations joining together for collective advocacy or policy change. For example, multiple CBDOs forming a coalition to advocate for more equitable city planning processes, or organizations collectively pushing for policy changes that benefit the communities they serve.
- **Service coordination partnerships:** Organizations coordinating complementary services to better serve shared clients. For instance, a housing provider partnering with employment services and financial counseling organizations to provide wraparound support for families working toward housing stability.
- **Strategic alliances:** Organizations combining distinct expertise to accomplish goals neither could achieve alone. An example would be an organization with strong community relationships partnering with one that has technical real estate development capacity to pursue a community-driven development project.
- **Funding collaboratives:** Organizations pooling resources or jointly pursuing funding to accomplish shared objectives. This might include organizations coming together to apply for a collaborative grant they couldn't pursue individually, or creating shared infrastructure that benefits all partners.

These partnership types often overlap. The key insight is that partnerships take different forms and serve different purposes, requiring different infrastructure and producing different outcomes. Understanding what kind of partnership you're building helps clarify what resources it needs and how to assess whether it's working.

HOW PARTNERSHIPS FORM: CRITICAL NEEDS, STRATEGY, AND ORGANIC EVOLUTION

Partnerships form in response to specific catalysts that create urgency, reveal gaps, or present opportunities that single organizations cannot pursue alone. Understanding these formation dynamics illuminates why certain partnerships succeed and which external conditions enable collaborative approaches. The organizations we spoke to described three pathways, each with different characteristics, infrastructure needs, and sustainability challenges. Partnerships can emerge from multiple origins, including ones beyond those listed here.

Partnerships driven from critical need emerge when communities face displacement pressure, harmful policy proposals, or sudden funding cuts. Organizations described forming coalitions when cities launched planning processes without authentic community engagement, or when pandemic financial pressures threatened organizational survival. As one leader explained, they formed and led a group of organizations facing similar destabilization to collectively advocate for emergency funding. These partnerships form rapidly, focus on specific outcomes, and leverage collective power. They often have limited lifespans, either achieving immediate objectives or concluding when crises pass.

Strategic gap-filling partnerships emerge from recognition that communities need comprehensive responses but no single organization has all the necessary expertise. Organizations described convening multiple partners to address challenges like workforce development, mapping existing capacity, identifying gaps, and creating coordinated models; in each of these challenges, different organizations contributed specific expertise. This approach requires sustained coordination capacity, clear role definition, and shared understanding of how contributions connect to collective goals. These partnerships have longer time horizons but remain vulnerable to capacity constraints and funding volatility.

Organically evolved partnerships develop through sustained place-based work. Organizations working in the same geography over time naturally develop relationships and build trust that enables deeper collaboration. Organizations described how neighborhood meetings, happening over many years, initially functioned as information-sharing but evolved into structured collaboration around shared priorities. These partnerships have deep trust and shared understanding but often depend on specific individuals and lack explicit governance structures. They struggle to demonstrate "results" in funder timeframes because relationship building happens slowly.

These different formation patterns matter because partnerships require different infrastructure depending on their origins. Crisis-driven coalitions need rapid mobilization capacity. Gap-filling partnerships need sustained coordination infrastructure. Organically evolved collaborations need resources for consistent convening. Funders expecting one partnership model to serve all purposes misunderstand collaborative work dynamics.

MAKING PARTNERSHIPS MUTUALLY BENEFICIAL

The organizations we spoke to emphasized that successful partnerships require mutual benefit operating across operational, financial, and relational dimensions. Misalignment on any dimension undermines functionality regardless of good intentions.

Operational alignment centers on whether partners can actually deliver what they promise given their staffing, systems, and expertise. Organizations described partnerships failing because operational realities made execution impossible. In one example, a partnership made conceptual sense but the service organization couldn't keep pace as the housing organization added families. When expected grant funding didn't materialize for staffing expansion, the partnership became unsustainable. The organizations ended it amicably while continuing other collaborations where capacity aligned better. This reveals that capacity assessment must happen honestly and continually.

Financial alignment requires making organizational gains commensurate with partnership costs. Partnership participation requires real investment in staff time, relationship building, and opportunity costs. Organizations noted a problematic assumption that larger organizations should simply pay for collaboration. As one leader explained, even at a larger scale, they didn't have a significant margin to subsidize partnership work. Partnerships need sustainable funding models where costs are covered by dedicated grants, integrated into budgets, or offset by resource savings.

Relational alignment centers on trust and reciprocity. Organizations emphasized that partnerships require genuine relationships, not just transactional coordination. "Doing what you say you'll do" emerged as the foundation of partnership trust. This means not overcommitting, communicating proactively when circumstances change, and acknowledging mistakes. Organizations that consistently deliver on commitments build trust, enabling deeper collaboration.

Several organizations noted that building trust requires time and sustained engagement that funding structures rarely support. Grant cycles pressure partnerships to demonstrate results quickly, but relationship building happens slowly. Organizations sustaining successful partnerships described early periods where work involved simply learning to work together.

INFRASTRUCTURE FOR PARTNERSHIP

Organizations emphasized that sustained partnerships require dedicated infrastructure beyond relationship skills and goodwill. Without adequate infrastructure, even highly motivated partners cannot collaborate effectively.

Consistent convening infrastructure emerged as the most fundamental need. Effective partnerships establish regular rhythms: monthly meetings, annual planning, periodic evaluation. Organizations maintaining place-based collaborative models described hosting regular meetings for years. The consistency matters because it creates habits and structures that survive relationship changes and staff turnover.

However, maintaining this has real costs. Someone must organize meetings, facilitate discussion, follow up on commitments, and communicate between gatherings. Organizations need dedicated staff capacity for coordination, not staff trying to coordinate on top of service delivery. As one organization noted, when small teams are "just trying to make a lot happen," finding time for partnership conversations or intentionality becomes nearly impossible.

Shared data and tracking systems enable coordination around families or constituencies that partners jointly serve. When multiple organizations work with the same residents but don't share information, they duplicate efforts and miss opportunities for complementary support. Organizations described implementing database systems to track families across programs. Without integrated systems, staff didn't know when they were serving the same families.

Cross-organizational data-sharing faces technical, legal, and cultural barriers. Organizations pursuing coordinated approaches described cobbling together workarounds: shared spreadsheets, regular case conferencing, informal communication. These help but don't provide systematic coordination.

Dedicated funding for coordination work represents perhaps the most critical gap. Organizations described constantly trying to fund coordination through restricted program grants that don't recognize coordination costs. They piece together staff time from multiple grants or use earned revenue to subsidize collaboration. This chronic underfunding means partnerships rarely have the infrastructure they need.

The irony is that funders increasingly require partnerships but rarely fund the infrastructure those partnerships require. This creates predictable problems. Coordination happens through heroic effort rather than sustainable infrastructure. And when resource pressures mount, partnership work gets sacrificed. As one organization explained, when pandemic pressures threatened survival, they had to "focus on our core" by setting aside collaborative work central to their mission.

NAVIGATING POWER DYNAMICS

Organizations demonstrated awareness of how power dynamics shape partnership experiences. Size differences, racial composition of leadership, resource disparities, and community positioning all affect partnership functioning.

Size disparities represent the most frequently discussed dynamic. Larger organizations worried about dominating partnerships. Smaller organizations described capacity constraints making participation difficult and concerns about whether partnerships primarily benefited larger institutions.

Organizations on the larger end described being conscious about not imposing on existing community infrastructure. Several described choosing not to take over community meetings despite having capacity because doing so would shift perception of whose space it was. As one leader explained, even though they could lead, they preferred to support rather than lead because "I don't think that's the vibe that I want to carry into any spaces."

From smaller organizations' perspective, the challenge involves having the capacity to participate meaningfully in partnerships structured by and for larger institutions. Meeting schedules and documentation requirements that work for organizations with dedicated staff may be impossible for smaller groups where leadership must handle everything simultaneously.

Financial dynamics compound size-based power relationships. There's often an assumption that larger organizations should financially support partnerships. While this sometimes makes sense, it creates dependency dynamics undermining partnership authenticity. Organizations emphasized that healthiest partnerships involve clear mutual benefit, not charity relationships.

Racial dynamics received less explicit discussion but emerged through organizations' awareness of how their positioning affects partnership possibilities. Organizations led by people of color described experiences where predominantly white-led institutions approached partnerships with assumptions about expertise, reflecting unconscious bias. White-led organizations described being conscious about not enacting "white savior complex" dynamics.

Research described in the Healthcare Anchor Network's playbook *Activating Place-based Partnerships for Equitable Economic Development* has documented how traditional community development partnerships often reproduce racial inequities when white-led anchor institutions maintain decision-making power while extracting knowledge from community-based organizations led by people of color. Organizations we interviewed demonstrated awareness of these dynamics but struggled with how to address them structurally.

Organizations emphasized that addressing power dynamics requires structural responses: compensating community partners for time and expertise, rotating leadership roles, and using decision-making processes that genuinely distribute power. However, organizations acknowledged significant implementation challenges. Compensating community members requires resources partnerships often lack. Rotating leadership requires capacity that smaller organizations don't have. Genuine power-sharing requires patience with slower decision-making, which funders don't always accept.

Resource scarcity is both barrier and motivator. Financial constraints shape partnership dynamics paradoxically, simultaneously preventing partnerships from receiving adequate resources and motivating collaboration by making it clear that no single organization can address comprehensive needs alone.

Partnership work requires real investment in staff time, joint activities, and sustained relationship building. Organizations managing service delivery with inadequate resources struggle to prioritize partnership participation when every hour coordinating is an hour not spent with residents. Organizations described how budget crises force difficult choices, and partnership work typically gets sacrificed because funders fund services while coordination remains unsupported.

The pandemic illustrated how financial pressures disrupt partnership infrastructure. When challenges mounted, organizations focused on core operations, setting aside collaborative work. Partnership infrastructure built over years deteriorated within months. This revealed how funding environments can structurally undermine partnerships. Even organizations deeply committed to collaboration must abandon partnership work when constraints threaten survival.

However, resource scarcity also motivates collaboration through recognition that no single organization can build comprehensive capacity. Organizations described pursuing partnerships because they couldn't afford the cost of developing expertise across housing, workforce development, childcare, and financial counseling. Partnering enabled more comprehensive responses than any organization could achieve independently.

Organizations also described how scarcity created urgency for collective advocacy. When organizations collectively faced threats they couldn't address individually, crises clarified shared interests and created motivation for coordination. This suggests that scarcity's impact depends on whether constraints are shared or affect partners differently. When all face similar pressures, scarcity can create solidarity. When some are stable while others struggle, disparities create power imbalances, undermining functionality.

Strategic Discipline: Knowing When to Partner
Organizations successfully managing multiple partnerships had clear frameworks for deciding which to pursue and which to decline. This required resisting considerable external pressure to partner more broadly while maintaining commitment where it genuinely served mission and community.

External pressure comes from multiple sources. Funders require partnership components in applications. Peer organizations seek partnerships to strengthen applications. Community members request connections between organizations. Board members push for partnerships based on the abstract principle that collaboration is good.

Organizations managed this pressure through explicit criteria: alignment with core mission, clarity about mutual benefit, realistic capacity assessment, and confidence that partnership would improve community outcomes beyond what organizations could achieve independently. The organizations we spoke to demonstrated this discipline through strategic decisions about which services to provide versus which to refer to partners. Despite persistent demand and board pressure for services like childcare, organizations declined when it would require building expertise outside core competency. Instead, they built partnerships with organizations specializing in that work. This required the confidence to say no despite external pressure.

When ending partnerships, the organizations that we spoke to said they were able to end official partnerships without severing the relationship. They completed existing commitments with integrity, had honest conversations about capacity limits, distinguished between ending specific collaborations versus broader relationships, and maintained openness to future partnership when circumstances changed. As one organization described, they ended a formal partnership when capacity and funding didn't align but continued collaborating on other initiatives where fit was better.

Conclusion

This research reveals that partnerships represent essential infrastructure for equity-centered community development. Organizations pursuing holistic responses to interconnected challenges cannot work in isolation. However, partnerships require dedicated resources, explicit attention to power dynamics, strategic discipline, and infrastructure that funding structures rarely support adequately.

The organizations we studied demonstrated sophisticated partnership approaches addressing real community needs through collaborative action. They showed how crisis response, strategic gap-filling, and organic relationship-building create different partnership patterns requiring different infrastructure. They illustrated how mutual benefit operates across operational, financial, and relational dimensions. They acknowledged how power dynamics involving size, race, and resources shape partnership experiences in ways that require structural responses beyond good intentions.

Yet they also revealed how current funding and policy environments undermine partnership sustainability. The scarcity of resources prevents adequate investment in coordination infrastructure. Funding volatility disrupts partnerships when organizations face budget crises. Competitive funding structures reward organizational distinctiveness over collaborative action. And accountability frameworks focus on individual organizational performance rather than collective community outcomes.

As the field faces unprecedented funding uncertainty while communities need comprehensive responses, understanding how to support sustainable partnership infrastructure becomes critical. The organizations pioneering effective collaborative models deserve resources and policy support matching the complexity and importance of partnership work. Without this support, partnership rhetoric will continue exceeding partnership reality, and communities will continue receiving fragmented responses to interconnected challenges requiring coordinated action.

Tool: Equity Fit Screen for Partnerships

PURPOSE AND CONTEXT

The Equity Fit Screen is a reflection tool to assess whether proposed or existing partnerships advance racial equity, strengthen organizational sustainability, and benefit residents first. This screen emerged from our research with community-based development organizations (CBDOs) managing complex partnership portfolios. It provides a structured approach that allows organization leaders to slow down and reflect during partnership decision-making, particularly when organizations are moving at a fast pace and facing external pressure to partner.

The tool is designed to reveal tensions between external partnership pressure and organizational capacity, mission alignment, and community benefit.

WHEN TO USE THIS TOOL

- When evaluating a potential new partnership
- When assessing whether to continue, deepen, or end existing partnerships
- When facing pressure from funders, boards, or peers to establish partnerships
- When multiple partnership opportunities compete for limited organizational capacity
- During strategic planning to evaluate whether a partnership portfolio aligns with mission

HOW THIS TOOL WORKS

The Equity Fit Screen is organized into six critical dimensions of partnership alignment identified through research on successful CBDO partnerships: resident benefit, accessibility, reciprocity, cultural and mission alignment, data and learning, potential for change. Each section includes reflection questions to guide assessment. The tool is designed to reveal tensions between external partnership pressure and organizational capacity, mission alignment, and community benefit.

This is not a scoring rubric where partnerships must “pass” every dimension. Rather, it’s a framework to make partnership trade-offs visible and intentional. Some partnerships may be strong on resident benefit but weak on financial reciprocity. Others may offer operational alignment but only limited structural change potential. The goal is an honest assessment of what the partnership offers and what it costs, and whether those trade-offs serve organizational mission and community priorities.

CRITICAL CONSIDERATIONS

While this tool can be used to catalyze reflection, decision-making, and alignment of partnerships, it is important to take into account two key considerations before applying the tool to present situations.

These critical considerations help outline what external factors to keep in mind when weighing a potential partnership.

Pressure to Rush into Partnership: Partnership assessment requires real time investment, yet organizations often face pressure to commit quickly to secure funding or respond to opportunities. Research suggests that rushing partnership commitments often leads to misalignment being discovered too late, wasting more time than an upfront assessment would have required. The time to assess partnership may vary, but more important than time is the thoughtfulness and intentionality that organizations should give, through:

- Internal team discussion about capacity and fit with strategic priorities
- Conversations with potential partners about expectations, decision-making, and resource commitments
- Consultation with residents or community stakeholders about whether the partnership serves their priorities
- Financial analysis of partnership costs versus organizational benefits

Alignment Feels Weak But Pressure Exists to Partner Anyway: Organizations frequently face situations where partnership alignment feels inadequate, but external pressure to partner is intense. Common scenarios include:

- Funders requiring partnerships as grant conditions
- Larger anchor institutions seeking partnerships that primarily serve their own needs
- Board members pushing for partnerships without understanding operational implications
- Peer pressure when other organizations are partnering

In these situations, the Equity Fit Screen helps articulate specific alignment concerns. This enables more productive conversations with funders, partners, or boards about what would need to change for the partnership to work. Questions to consider when alignment feels weak:

- Can we negotiate different partnership terms that improve alignment?
- Is there a lighter-touch relationship that would work better than the proposed deep partnership?
- What specific resources or structural changes would make this partnership viable?
- Are there ways one or both partners can grow through the relationship?
- Are we being asked to partner because we're the best fit, or because we're available?
- If we decline this partnership, what relationships or opportunities might we lose, and is that acceptable?
- What's the cost of saying yes to a misaligned partnership versus the cost of saying no?

Organizations we studied emphasized that declining partnerships when alignment is weak often serves communities better than accepting partnerships that drain capacity without proportional benefit. However, this requires organizational confidence and financial stability that not all CBDOs have. When organizations feel they cannot decline partnerships due to resource constraints, documenting alignment concerns creates accountability and helps negotiate better terms.

1. Resident Benefit First

Partnerships should directly improve outcomes for residents, not just improve organizational relationships or meet funder requirements. This dimension assesses whether the partnership genuinely serves community priorities or primarily serves institutional interests.

Reflection Questions:

- **Does the partnership improve access, stability, or wealth-building for residents?** Be specific about how residents will (or won't) benefit. Does the partnership reduce barriers to services, create pathways to economic opportunity, stabilize housing, or build community assets? Partnerships that primarily benefit institutions through data access, research opportunities, or organizational visibility without clearly benefiting residents should be questioned.
- **Are resident voices integrated into partnership design and accountability?** How will residents shape what the partnership does and evaluate whether it's working? Partnerships designed entirely by institutions without resident input often miss what communities actually need. Consider: Are residents involved in planning partnership activities? Do residents have power to change the partnership's direction if it's not working? Are residents compensated for their time and expertise in partnership governance?
- **Does the partnership respond to community-identified priorities or funder-identified priorities?** Be honest about whose priorities are driving the partnership. If the partnership emerged primarily from funding opportunities rather than community needs, it may not serve residents first regardless of good intentions.

Warning Signs:

- Partnership benefits are articulated in abstract terms ("building community capacity") without specific resident outcomes
- Partnership design happened without consulting the residents who will be affected
- Partners cannot clearly explain how residents will be better off through this collaboration
- Residents have advisory roles but no decision-making power in partnership governance

2. Accessibility & Wraparound Integration

Strong partnerships reduce the barriers that residents face. This dimension assesses whether the partnership makes it easier for residents to access needed support or adds complexity to service navigation.

Reflection Questions:

- **Does the partnership reduce barriers like inadequate or nonexistent childcare and transportation, lack of language access, or health needs?** Consider whether the partnership addresses known barriers residents face or simply adds services without removing obstacles to accessing them. Partnerships that bring complementary services together can reduce the burden on residents to navigate multiple systems. Consider: Does the partnership enable residents to access multiple supports in one location? Does it provide wraparound services (like childcare during job training) that remove participation barriers? Does it reduce paperwork or eligibility confusion by coordinating across programs?
- **Does it bring services closer to where residents already are, or does it require residents to travel to new locations?** Partnerships work better when they meet residents where they are rather than requiring them to navigate to unfamiliar institutions or neighborhoods. Consider: Can partnership activities happen in trusted community spaces? Does the partnership reduce travel burdens on residents? For residents with limited mobility or transportation challenges, is the partnership accessible?
- **Does the partnership enable better coordination across the services a family receives?** When multiple organizations serve the same residents, coordination can reduce duplication, identify gaps, and provide more holistic support. Consider: Does the partnership include mechanisms for sharing information about families served (with appropriate consent)? Will staff across organizations know when they're serving the same families and be able to coordinate support? Does the partnership help identify families falling through gaps?
- **Does the partnership create new administrative burdens for residents?** Sometimes partnerships intended to help residents actually create more complexity. Consider: Does the partnership require residents to navigate new eligibility processes? Does it create conflicting requirements across programs? Does it add reporting or documentation burdens?

Warning Signs:

- Partnership adds services without addressing barriers that prevent residents from accessing existing services
- Partnership requires residents to travel to new, less accessible locations
- Partnership creates new coordination complexity for residents rather than reducing it
- Enthusiasm about service integration is not matched by plans for how coordination will actually work

3. Operational & Financial Reciprocity

Partnerships require real resources: staff time for coordination, reporting to demonstrate partnership success, and overhead costs for relationship management. This dimension assesses whether partnership costs and benefits are equitably distributed or whether some partners shoulder disproportionate burdens.

Reflection Questions:

- **Are partnership costs (staff time, reporting requirements, coordination overhead) equitably covered?** Estimate the actual costs of partnership participation: staff hours for meetings, time for joint planning, reporting required to document partnership, coordination between organizations. Are these costs covered by dedicated partnership funding, or are organizations expected to absorb them? If costs are unequally distributed, is there clear justification (e.g., larger organizations may appropriately handle more coordination if they have dedicated capacity)?
- **Are benefits mutual, not one-sided?** What does each partner gain from collaboration? Healthy partnerships involve clear value exchange. Weaker partnerships involve one partner primarily serving another's needs. Be specific: Does the partnership help each organization advance their mission? Does it strengthen each organization's relationships with funders or community? Does it build capacity or expertise? If benefits flow primarily in one direction, the partnership may not be sustainable.
- **Can our organization sustain the partnership participation level expected?** Be realistic about whether you have capacity to deliver what partners expect. Partnerships fail because one or both partners committed to participation levels they couldn't sustain. Consider: Do we have dedicated staff capacity for coordination, or will this fall on already-overwhelmed team members? Can we maintain this participation level if a key staff person leaves? What will we have to stop doing to make room for this partnership?
- **If the partnership requires our organization to provide more than we receive, is there a clear mission-based justification?** This is not a one-size-fits-all approach. There are cases where the balance of responsibilities, funding, or benefits won't be equal. Ask: Why will this partnership benefit us and our mission despite an unequal footing?

Warning Signs:

- Partnership costs are described as "minimal" or "just attending meetings" without examining real-time investment
- Larger partners assume smaller organizations can absorb partnership costs because "it's not much"
- Benefits articulated for one partner are much clearer than benefits for other partners
- Partnership timeline and participation expectations were set without consulting all partners about their capacity

4. Cultural & Mission Alignment

Partnerships function best when organizations share core values and complementary missions. This dimension assesses whether partners have compatible organizational cultures and whether the partnership reinforces rather than dilutes each CBDO's mission focus.

Reflection Questions:

- **Does the partner share equity and racial justice values, not just in rhetoric but in practice?** Look beyond mission statements to actual organizational practice. Consider: What is the racial composition of a partner's leadership and board? How does the partner compensate leadership and make decisions? Does the partner have a track record of authentic community accountability? Organizations with fundamentally different equity commitments will struggle to partner effectively even when programmatic alignment seems strong.
- **Does the collaboration reinforce the CBDO's mission and holistic vision, or does it pull it toward fragmented service delivery?** Partnerships should strengthen organizational mission, not dilute it. Consider: Does this partnership help us deliver on our theory of change about how communities achieve stability and economic opportunity? Does it enable more integrated service delivery, or does it push toward siloed interventions? If the partnership requires compromising core values or approaches, it may not be worth pursuing.
- **Are decision-making processes and organizational cultures compatible enough to enable effective collaboration?** Organizations have different cultures around decision speed, risk tolerance, communication styles, and planning horizons. Significant cultural differences can make partnership difficult even when mission alignment seems strong. Consider: Does the partner make decisions at a pace compatible with our processes? Do communication styles match well enough to avoid constant misunderstanding? Can both organizations live with the inevitable compromises partnership requires?
- **Does the partnership advance our long-term strategic priorities, or is it a short-term opportunistic response to available funding?** Be honest about whether the partnership emerged from strategic planning or from chasing funding. Partnerships driven primarily by funding availability often don't survive beyond the grant period and can distract from strategic priorities.

Warning Signs:

- Partner's equity values are articulated in mission statement but not evident in leadership demographics, decision-making, or community relationships
- Partnership would require the CBDO to adopt approaches that contradict their theory of change
- Significant cultural differences around decision-making have already created friction in early partnership conversations
- Partnership emerged primarily from funding opportunity rather than strategic planning

5. Data & Learning

Partnerships should generate learning about what works and contribute to field knowledge about equity-centered approaches. This dimension assesses whether the partnership includes mechanisms for tracking outcomes, sharing data, and improving practice.

Reflection Questions:

- **Can outcomes be tracked and data shared transparently among partners?** Consider whether partners have compatible data systems and willingness to share information. Effective partnerships require the ability to track families across services, identify gaps, and understand whether interventions work. Consider: Do partners have data infrastructure to track partnership outcomes? Are partners willing to share data in ways that enable learning? Are there clear protocols for data sharing that respect privacy while enabling coordination?
- **Does the partnership contribute to equity learning and improvement, not just service delivery?** Strong partnerships generate insights about what enables families to achieve stability and economic mobility. Consider: Does the partnership include regular reflection on what's working and what's not? Are partners willing to adjust approaches based on learning? Does the partnership contribute to broader field knowledge about equity-centered community development?
- **Are there mechanisms for resident feedback on partnership effectiveness?** Partnerships should include ways for residents to share whether the collaboration actually helps them. Consider: How will residents provide feedback on whether the partnership works from their perspective? Will that feedback shape partnership decisions? Are residents compensated for the time they spend providing feedback?
- **What happens to data and learning if the partnership ends?** Consider whether learning from the partnership will be captured and accessible beyond the specific collaboration. This matters for both organizational learning and field knowledge.

Warning Signs:

- Partners have incompatible data systems and no plan for integration or coordination
- Partnership includes vague commitments to "collect data" without specific plans for what data, how, and how it will inform decision-making
- No clear mechanisms exist for residents to provide feedback on partnership effectiveness
- Partners seem more interested in generating data for reports than in using data for learning and improvement

6. Policy & Structural Change Potential

The most powerful partnerships don't just deliver services more efficiently but work to change systems that create barriers for residents. This dimension assesses whether the partnership includes potential for advocacy and structural change.

Reflection Questions:

- **Does the collaboration help shift systems (such as housing policy, benefit cliffs, funding formulas, employment practices)?** Consider whether the partnership creates opportunities to address root causes of challenges residents face, not just symptoms. Strong partnerships generate insights from service delivery that inform advocacy for policy change. Consider: Does the partnership identify specific policy barriers that harm residents? Do partners have an appetite for advocacy to address those barriers? Does the partnership create political power through collective voice that individual organizations lack?
- **Is there an advocacy pathway linked to the partnership, or is it limited to service delivery?** Be explicit about whether the partnership includes mechanisms to translate service delivery insights into policy advocacy. Consider: Do partners share commitment to policy advocacy as essential to their work? Are there clear processes for how the partnership will engage in advocacy? Do partners understand and accept the risks that advocacy can create with funders or government?
- **Does the partnership build community power and resident leadership, not just organizational relationships?** Partnerships advancing equity should strengthen residents' collective power to shape decisions affecting their communities. Consider: Does the partnership include mechanisms for resident leadership development? Does it support community organizing? Does it strengthen residents' relationships with one another and their ability to advocate collectively?
- **Can the partnership navigate the tension between receiving government funding and challenging government policy?** Many CBDOs depend on government funding while also needing to advocate for government policy changes. Partnerships should enable rather than constrain this advocacy. Consider: Do partners share understanding of how to navigate advocacy while maintaining funding relationships? Can the partnership provide political cover for advocacy through collective voice? Are partners willing to take calculated risks for policy change?

Warning Signs:

- Partnership focuses exclusively on service delivery with no attention to structural barriers
- Partners are unwilling to engage in policy advocacy due to concerns about funding relationships
- Partnership rhetoric includes language about "systems change" without specific strategies for how to achieve it
- Partnership reinforces rather than challenges existing power dynamics between institutions and communities

Using the Equity Fit Screen: A Process Guide

STEP 1: INITIAL ASSESSMENT (1-2 HOURS)

Convene the team members who would be involved in the partnership. Walk through each dimension and its reflection questions. For each dimension, rate alignment on a simple scale:

- **Strong Alignment:** Partnership clearly meets this dimension, with evidence to support assessment
- **Moderate Alignment:** Partnership partially meets this dimension, with some concerns or unknowns
- **Weak Alignment:** Partnership does not meet this dimension, or serious concerns exist
- **Unknown:** Insufficient information to assess this dimension

Document specific evidence or concerns for each rating. The goal is not to calculate an overall score but to make trade-offs visible.

STEP 2: IDENTIFY CRITICAL GAPS AND INFORMATION NEEDS (30 MINUTES-1 HOUR)

Review dimensions rated as "Weak Alignment" or "Unknown." For each:

- Is this dimension critical to our mission and values, or is it less essential for this particular partnership?
- If critical, what specific changes would improve alignment?
- If unknown, what information do we need to assess alignment?
- Who do we need to talk with (potential partners, residents, funders) to get that information?

This step often reveals that partnerships rushed into being due to funding deadlines lack basic information needed to assess fit.

STEP 3: DEEPER PARTNERSHIP CONVERSATION (1-2 WEEKS)

Before committing, have explicit conversations with potential partners about dimensions where alignment is unclear or weak. Questions to discuss:

- How does each organization understand partnership goals and expected outcomes?
- What resources (staff time, funding, infrastructure) will each organization contribute?
- How will decisions be made when partners disagree?
- What mechanisms will ensure resident voice in partnership direction?

- How will costs and benefits be distributed?
- What happens if the partnership isn't working? How would we adjust or end it?

Organizations described these conversations as essential but often skipped due to time pressure. Yet partnerships that skipped alignment conversations almost always encountered problems later that took more time to resolve than upfront discussion would have required.

STEP 4: RESIDENT CONSULTATION (ONGOING)

For partnerships significantly affecting service delivery, consult with residents about whether the partnership serves their priorities. This doesn't require formal surveys but should include mechanisms for residents to provide input. Consider:

- Discussing the partnership at existing resident gatherings
- Asking residents currently receiving services about whether the partnership would help them
- Including resident representatives in partnership planning conversations

STEP 5: DECISION-MAKING

Bring the team back together to review what you've learned through deeper assessment. Make the partnership decision explicit:

- **Proceed:** Alignment is strong enough to move forward. Document any concerns to monitor as partnership develops.
- **Negotiate:** Alignment has significant gaps, but partnership could work with changes. Articulate specific changes needed and whether potential partners are willing to make them.
- **Decline:** Alignment is too weak, and changes that would make it work are not feasible. Declining may feel risky, but pursuing misaligned partnerships often harms the organization and community more than declining them would.
- **Defer:** Partnership has potential but requires more assessment or organizational capacity development before proceeding.

STEP 6: MONITORING (ONGOING)

For partnerships you proceed with, revisit the Equity Fit Screen as needed to determine if fit is still working. Partnerships evolve as circumstances change, funding shifts, or staff turns over. Regular reassessment helps identify when adjustments are needed before partnerships deteriorate.

Conclusion

The Equity Fit Screen provides a structured approach to partnership assessment that makes trade-offs visible and decisions intentional. It recognizes that partnerships require real resources and that pursuing misaligned partnerships can harm organizations and communities more than declining them would.

The tool acknowledges that organizations face very real pressure to partner even when alignment is weak, particularly when declining a partnership risks funding loss or relationship damage. In these situations, the Screen helps articulate specific alignment concerns rather than vague discomfort, enabling more productive negotiation about what would make partnerships work.

Most importantly, the Screen centers resident benefit as the primary purpose of the partnership. Partnerships that primarily serve institutional interests, funder requirements, or organizational convenience should be questioned regardless of other alignment factors. CBDOs exist to build community power and economic opportunity for residents. Partnerships should advance that purpose or they're not worth pursuing.