Action Plan for Establishing Local Strategic Partnerships Methodology

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1. Introduction

A **strategic partnership (SP)** is mostly understood as a formal alliance between two legal entities, which leads towards forming a legal partnership or, agency, or corporate affiliate relationship. Typically two companies form a strategic partnership when each possesses one or more business assets that will help the other, but that each respective other does not wish to develop internally.

For SC institutions the level of formality of a strategic partnership may vary with different (types of) stakeholders, from written agreements (e.g. sponsoring or cooperation contracts) to different forms of networking, e.g. through regular meetings, mutual exchange of information, etc. How to achieve mutual commitment and liability of a strategic partnership varies from stakeholder to stakeholder/different communication cultures etc. E.g. with a large company a written agreement might be appropriate, whereas an individual expert or a NGO might be put off by a more formalized approach.

The proposed action plan methodology for establishing strategic partnerships thus provides a framework, which can/should be adapted to the different local conditions, different types of stakeholders and diverse strategic aims of the respective SC institution.

According to the application form:

One of the key tasks of SC Agents will be to establish strategic partnerships through networking. Strategic partnerships enable SCs to enhance the effectiveness of cooperation with innovation actors and to increase the efficiency and significance of SC services offered. Such partnerships will also increase funding possibilities (business and public) for SCs, and the dialogue with stakeholders will contribute to creating supportive policy frameworks (in WP3). First, partnerships will be built at local & regional level. SC Agents will draft action plans on building strategic partnerships and will initiate contact and visit companies and public organisations in their local and regional area and will maintain contacts and cooperation throughout the project. Beside establishing professional connections for cooperation, strategic partnerships offer also the possibility of financial support to SCs within the framework of Corporate Social Responsibility (CSR). Cultural, educational institutions and initiatives that contribute to the cultural, societal and physical well-being of the public are often promoted by the business sector in the form of sponsorships and Strategic Partnership.

Having these aspects, the role of effective SPs becomes vital for the future of science centres (SC). Thus, understanding the role of SPs and learning the steps of how to perform SP should be included in the corporate culture of each science centre [1, 2]. Before proceeding to the next concepts, Figure 1 presents a general structure of the SP implementation in the framework of the SEE SCIENCE project. It is vital for the partners to understand the relationships between the different WPs of the project and more specifically, how they link together towards achieving a proper and project specific action plan.
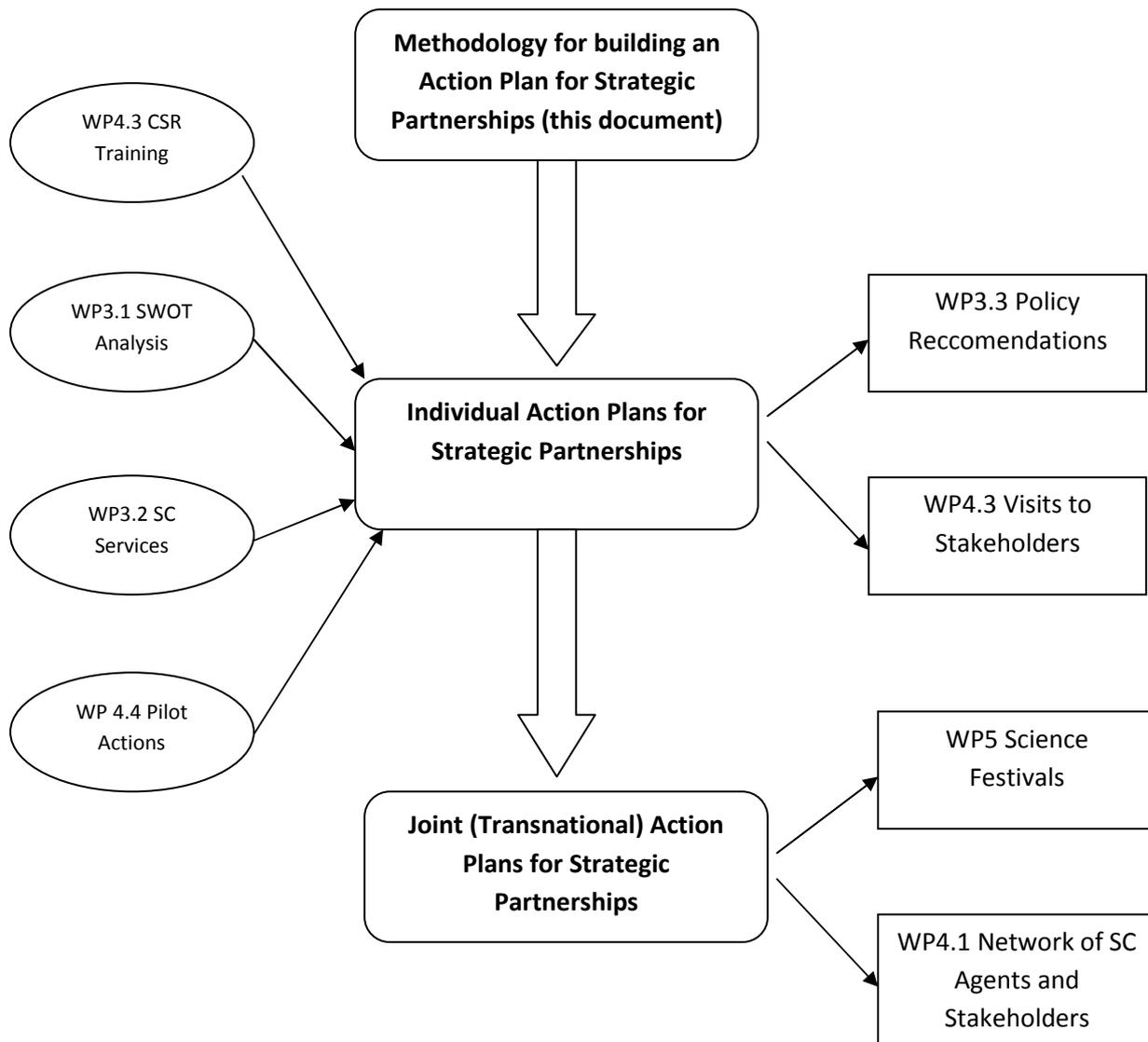
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Figure 1: SP implementation in the framework of the SEE SCIENCE project

The purpose of Figure 1 is to express the interconnectedness of the WPs among them. More specifically, when it comes to the actual application of this methodology, the PPs should take into account the outputs and inputs from the other WPs as well. For example, as an outcome of the CSR Training, the PP posses certain knowledge of dealing with potential stakeholders and how to approach them. Additionally, the outcomes of the SWOT analysis performed in WP3.1 (the development issues) and the collected SC Services (WP3.2) can be used as drivers/motives for developing a strategic partnership. Consequently, the pilot actions (WP4.4.) are a good opportunity for involving strategic partners and make them committed through cooperation. On the other hand, several outcomes of the individual action plans for strategic partnerships can result in certain policy recommendations useful for WP3.3 as well as in visits to the stakeholders (WP4.3). Finally, when all the individual/local action plans will be finalized, a joint/transnational action plan will be devised based on the local experiences in terms of building local strategic partnerships. This

outcome will enhance the capacity of the science festivals and will enable an interconnected translational network of SC Agents with their stakeholders.

Transcending towards the actual usefulness of the SPs, several benefits for the SEE SCIENCE project goals are listed below:

- More skilled, innovative future workforce.
- Wider coverage of the institutional corporate social responsibility policy.
- Long term economic prosperity.
- Personal development – lifelong learning.
- Better identification of real problems by using real experts.
- The results of common work are greater than the one of individual work.
- Expanding the horizons – new areas of application.
- Enhanced scientific integrity, validity and reputation.
- Technological development.
- Active participation of more members/institutions in each others' area of operation leading to better dissemination, knowledge sharing, cross-fertilisation and innovation capacity.
- Better internal policy recommendations.
- Goal alignment and knowledge discrepancy mitigation.
- Overall, better innovation capacity, enhanced future sustainability and financial prosperity.

Additionally, for the SEE Science project partners, strategic partnerships with local stakeholders may contribute to tackling several of the identified (transnational) development issues, namely (from WP3):

- Expansion of didactical expertise in non-formal education
- Measurement of achievements in informal learning and engagement in science
- Adaption to changes in educational system through education of explainers
- Development of regional profiles/clusters within the informal educational Ecosystem
- Development of new tailor made programs for special groups such as youth, women, migrants and disabled
- Education of staff
- Establishment of co-operations with researchers to actively involve them into development of the activities of the Science Center
- Establishment of co-operations with researchers to involve them as experts
- Development of new programs on education in co-operations with research institutions and companies
- Co-operation with business on projects, training and sponsoring
- Invitation into the circle of Science Centre friends to actively participate in development of the activities of the Science Center
- Building innovative co-operations on art and science

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- Setting up an open grant program to finance science popularization, rate science popularization
- Setting up local advisory boards
- Co-operating with young people on common issue

2. Prerequisites for developing strategic partnerships

Every institution has its own prerequisites and requirements for developing a strategic partnership, however, general features described by [3] are useful to consider: strong leadership, trust amongst partners, an independent staff team, a common understanding/knowledge base, capacity to focus on overarching priorities, co-ordinated planning processes, integrated action plans across partners, integrated stakeholder community consultation, development, and participation strategies, increased synergy in accessing and deploying resources, mechanisms for review and evaluation, scope for innovation/cooperation/funding, parallel processes to build capacity within member organisations, etc. More details are given in section four.

Despite of these prerequisites, there are also several issues that are involved within building strategic partnerships. These aspects are also implied to be known by the institution that aims to launch a strategic partnership [4]:

- *Building and maintaining sustainable partnerships capacity* (how: bridge academia, industry and local authorities, launch persistent calls for collaboration, etc)
- *Being aware of the involved policies, concepts, topics and actions* (such as: intellectual property management, how to increase commercialization success, increase the number of partnerships, technology integration, involvement of governmental bodies, etc).
- *Personal/Social skills* (e.g.: good networking skills are required for the person which will initiate the strategic partnership (SC Agents), development of non-technical skills, promote multiculturalism, open minded character, etc).
- *Finding and understanding the stakeholders [9].* It is always a necessity to know where to look for stakeholders. For example, Table 1 presents a potential list of sectors/places from which science centre stakeholders may arise:

Table 1 – Where to find science centre stakeholders

- Associations of towns and municipalities; - Associations of political parties; - Business sector; - Chambers; - Citizens' initiatives; - Consultants; - Education or/and training	- Political institutions; - Public authorities (national, regional, local); - Public employment services; - Regional development associations and management bodies; - Representatives of employees and employers;

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organisations; • Financial institutions; • Government institutions; • Innovator Agencies • "Know-how" carriers; • Non-governmental organisations (NGOs) /not for profit organisations (NPOs);	• Representatives of the civil society; • Research institutes, universities; • SMEs and large enterprises • School boards; • Social partners; • Women's spokespersons / gender mainstreaming experts.

Several examples of their own potential stakeholders proposed by each PP as an sub-task for preparing the CSR Training are the following:

• University of Debrecen • National Instruments Corporation (software) • TEVA (healthcare) • E.ON (Electricity) • COOP (Supermarket) • British Telecom • The University and Scientific Research Department of Trento • University of Trento • The Centre for Integrative Biology • FBK (research) • TrentoRISE (ICT research, education and business) • TentinoSVILUPPO (sustainable development public agency) • Trento Federation of Cooperation • Ceii Trentino Business Innovation Centre • CFSI (international cooperation)	• MANDACARU (business) Melinda & Trentingrana (famous Trade Mark) • Mondi (paper and packaging producer) • T-Systems (telecom) • A1 Telekom Austria • Compuritas (ecological ICT) • 3M • Loux (soft drinks company) • Agrino (food) • Microsoft Hellas • LUKOIL • Overgas Inc. • M-Tel (telecom) • ECOPACK (recycling) • Danone (dairy products) • Boussole CSR (European educational platform for CSR)

3. Building the strategic partnership

3.1 The Action Plan Methodology

The following methodology is designed for the overall needs of the SEE SCIENCE project and is it based on the best practices from [3, 5]. To this extent, when applying this methodology for each PP's institution the actual stages can be further specialized in order to meet the local needs.

Table 2 – The Action Plan Methodology for building strategic partnerships

Step	Description
Step 1 **Establish the purpose of the partnership based on the strategic goals** SEE SCIENCE Goals: • Promote Innovation • Achieve SC financial sustainability • Public outreach, etc	1.1 Identify the internal reasons/needs of your institution that point towards a partnership (you can refer to the development issues from the SWOT analysis you performed in WP3. 1.2 What future needs will require a strategic partnership (think about the opportunities identified in the SWOT)? 1.3 How can a partnership bring added value to your science centre? 1.4 Science Agents should get support from the senior management before taking more actions!
Step 2 **Devise a list with potential strategic partners and perform a brief stakeholder analysis**	2.1 Devise a list with potential stakeholders (you can refer here to your list of stakeholders identified for the CSR Training). 2.2 Perform a brief stakeholder analysis for each stakeholder (based on the information available online – website, reports, newspaper, etc). 2.3 Try to match the best Weakness-Strength couples between you and the stakeholders. 2.4 Imagine what is the partnership able to deliver as a group – and what added value is being brought to each partner (refer here to step 1).
	3.1 After investigating the potential partners, the market (local needs), re-assess your needs to

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	become realistic (try to focus on specific needs than can be clearly stated).
Step 3 **Revise the vision of the organization and goals of the SEE SCIENCE project and prepare for visiting the intended stakeholders.** **Documents to prepare:** • **Info about SEE SCIENCE** • **Profile of your organization** • **Reasons for partnership** • **What can you offer** • **Proposed steps to follow**	3.2 Develop the profile of the chosen stakeholders: get a clear picture (e.g. by internet research, reliable informants) about their products/activities/ potential strategic interests, catchwords, communication style, CSR activities - in order to make a tailor-made proposition to them, both on the content and on the formal and communication levels (in the previous stage you identified a wide list of stakeholders, however, now you choose only those who you intend to make a partnership with). 3.3 Establish your final vision, while also taking into account the vision of the prospective partners. 3.4 Brainstorm the main directions for achieving that vision – devise a draft. 3.5 Think of potential monitoring techniques to assure that your draft idea will be on track (employ effective project management techniques – milestones, SMART objectives, evaluations, etc).
Step 4 **Contact your targeted stakeholders**	4.1 Possibly, identify door-openers (key persons) to help establish the first contact (personal contacts, references etc.). Use your existing (or SEE SCIENCE) network for this purpose. 4.2 Contact the targeted stakeholders with a brief abstract of your intention (could be over the phone, however meeting in person would be preferable). 4.3 Organize a meeting to discuss the potential collaboration. 4.4 Make sure that your visions are compatible – or if they can be re-adapted. 4.5 Devise a final list of common objectives to be

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	achieved (in conjunction with your stakeholder's interest).
	4.6 After the initial meeting, re-contact the stakeholder to maintain a live contact (also make sure to arrange regular meetings).
Step 5 **Devise joint schedule for strategic partnership** **Management issues** **(Devise a document – the description of the partnership)**	5.1 Decide which activities to develop (by performing a brief feasibility check on each proposed activity) 5.2 Map each activity with each strategic objective (defined in step 1). 5.3 Define the partnership management board / steering committee. 5.4 Establish the responsible persons for planning and delivery. (The SC Agent should be actively involved here or even be the coordinating person, both externally, towards stakeholders, and internally through knowledge sharing/knowledge management in your organisation). 5.5 Create a clear schedule with targets and milestones (refer to the monitoring tools developed at step 3.5). 5.6 Assign a monitoring and quality assurance person in order to assure the desired outcomes are in terms with the SEE SCIENCE project. 5.7 Define the joint and individual quality assurance standards. 5.8 Devise the recommendation making process based on the observed results. Draft possible corrective actions. 5.9 Discuss dissemination issues. 5.10 Regularly reassess and monitor the entire partnership. In case of problems – discuss them in the steering committee. 5.11 Devise a problem solving mechanism to assist the functioning of the partnership ** However, for smaller or less formal organizations this approach can be less formal (adapt this approach*

	to be suitable for each stakeholder).
Step 6 **Implementation of individual activities**	6.1 Implement the activities according to the guidance emerged from step 5.
Step 7 **Final evaluation**	6.2 Check whether the desired goals have been achieved and perform any future recommendations.

3.2 Partnership committees

Table 3- The roles

Scientists/Experts/Researchers from the science centre	• They deal with Step 1 and Step 2 from Table 2 • They also implement the defined objectives
Management board of the science centre, esp. the SC Agents	• They deal with Step 3 and Step 4 • In some cases they work in conjunction with the Scientists/Experts/Researchers.
Management board / Steering committee of the partnership.	• They deal with steps 5 - 7. • They will receive systematic feedback from the Scientists/Experts/Researchers and when needed, from the management board of the science centre.

3.3 The contract

In case that you want to achieve a formal partnership agreement, the following aspects should be taken into consideration. The strategic partnership usually is being formalized into a cooperation contract which is signed by all parties involved. This contract should contain the following aspects (just for guidance, not compulsory): a brief introduction to the situation to be signed, partner's institutional profiles and contact details, preamble, acronym list, specific objectives, key activities (join them in articles or well defined text blocks), roles and responsibilities, statement of confidentiality, intellectual property rights, internal problem solving mechanisms, monitoring and evaluation, operational dates, legal institutional representatives, signatures, etc.

4. Good and sustainable partnership in the framework of the SEE SCIENCE project and beyond

In order to be aware of the best practices in terms of building strategic partnerships, there are several aspects that need to be known [6,8,9].

- Assure full partner participation and commitment (*make sure that the actual stakeholder is fully engaged in your common goals and that their work is totally focused*).
- Devise easy to implement objectives and have a good established plan as well as schedule (*do not be over-ambitious with your objectives and schedule – rather devise clear and easy to implement goals that can be also measured at the end*).
- The partnership enjoys political, social acceptance and trust (*make sure there are no conflicting issues between your organization and the stakeholder that would affect your goals. Build on the trust relationship by being totally transparent in your activities concerning your common project*).
- Strong sense of ownership is evident as well as a win-win situation (*give to the partnership committee a strong sense of ownership over their project in order to achieve a better result – rather than just giving them the sense of building product for somebody else*).
- Promote idea diversity and equal opportunities (*allow open brainstorming sessions and take into account as many different ideas as possible – try to balance the ideas proposed by your institutions with the ones of the stakeholders'*).
- Keep a positive atmosphere within the team and always take into account the sustainability of your project (*maintain constant communication with your partners, increase your visibility and include social events to celebrate your successes*).

5. Case studies

In order to provide several examples of how building a strategic partnership works, we are going to present in more details three case studies that have been briefly discussed during the CSR Training of the science agents. These examples are presented in Appendix A and depict real case studies of different science centres that have built strategic partnerships for different purposes.

Conclusion

Overall, building local strategic partnerships involves a well established institutional research and analysis in order to be able to match the most useful partners. To the same extent, the steps that form the action plan for building local strategic partnerships must be carefully chosen in order to assure the desired outcomes for science centres: innovation, knowledge dissemination and financial sustainability. Figure 2 provides an overview of the action plan's main steps.
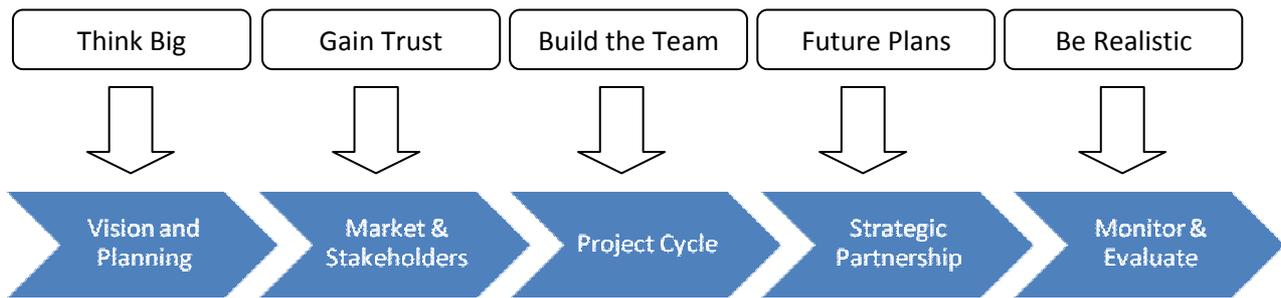
Figure 2 – Action plan for building local strategic partnerships

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Appendix A – Brief Case studies

Case Study 1 – Ontario Science Centre

Science Centre	Ontario Science Centre (OSC)
Partnership strategy/ purpose (step 1)	The Partnerships Strategy is to create a range of relationships that will deliver funds, technology, expertise, and human resources to create and sustain *Agents of Change*. These partnerships must satisfy the needs and interests of the OSC, our partners and our visitor / participants
Potential strategic partners (step 2)	Toronto District School Board (TDSB) Lucent Technologies Canada AT&T Foundation
Setting common goals, implementing and monitoring the partnership (steps 3-7)	In 1999, the Ontario Science Centre received a $600,000 grant from a corporate foundation to fund a new initiative called OSClub. The program was initially a partnership between the Ontario Science Centre (OSC), the Toronto District School Board (TDSB), and Lucent Technologies Canada. Today, it is sponsored financially by the AT&T Foundation and involves school boards across the greater Toronto area. It is an annual program for 50 grade 9 and 10 students (aged 14–15), 10 pre-service and 10 in-service teachers, and mentors from business and industry. Students engage in experiences that highlight and demonstrate real-world applications of science, mathematics and technology, working with teachers and industry mentors. What does the program offer to the businesses that provide mentors? It enables them to develop long-term partnerships with educational institutions (schools, boards of education, OSC). It provides a development opportunity for their employees, who participate as mentors and develop improved communication skills, knowledge and understanding. OSClub contributes indirectly to a more highly skilled and knowledgeable future work force. And finally, in an era when many corporations are concerned with social responsibility, OSClub provides an opportunity for community involvement. For the students there are also major advantages. They gain employment skills and are introduced to exciting career opportunities. They have the opportunity to see the applications of science, math and technology in business and industry. They develop relationships with peers and adults from outside their own school / community. They learn the benefits and challenges of working in a team. Finally, there are impacts for the in-service and pre-service teachers. OSClub provides the opportunity to develop new teaching strategies. Teachers develop relationships with business and industry mentors. They have the opportunity to develop programs collaboratively with other innovative science teachers and to work with motivated and talented students. All of this can be carried back to their home classroom.

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Case Study 2 - Carnegie Science Centre

Science Centre	Carnegie Science Centre
Partnership strategy/ purpose (step 1)	This unique partnership between PPG Industries and the Carnegie Science Centre enhances the science and technology education of students in the community while providing PPG with appropriate recognition. Outreach programming to local schools and communities using PPG technology is transported by vans with PPG logos and products displayed. The programs include films of PPG Scientists at work
Potential strategic partners (step 2)	PPG Industries
Setting common goals, implementing and monitoring the partnership (steps 3-7)	The first three programs directly related to PPG's science and technology, "Great Colour Caper" – all about colour, light and perception; "Fractured Physics" – the physics of glass and "Ion Jones and the Lost Castle of Chemistry" – PPG chemistry – have been very well-received in South-western Pennsylvania and Ohio. The replication of the "Great Colour Caper" with Discovery Place in Charlotte, NC has also been very successful. A fourth program, "Captain Green's Time Machine," relating to energy and the environment was rolled out in 2009.

Case Study 3 – Science Centre of Singapore

Science Centre	Science Centre Singapore
Partnership strategy/ purpose (step 1)	To promote the importance of developing the love of science for the sustainability of future generations. The Shell SYSF has grown to become a key annual event in the school calendar.
Potential strategic partners (step 2)	Shell Science Teachers' Association of Singapore (STAS)
	Activities include the Shell Science Fair, SYSF Science Explorama, SYSF Stage!, the Teachers', Students' and the Public Seminars. These activities provide an avenue to showcase the creativity and innovation of the students and encourage students of very diverse backgrounds to come together with science as the common platform. On 17 May 2008 we celebrated Shell's sponsorship of a five-year Climate Change exhibition at the Science Centre Singapore (SCS). This effort was a partnership between SCS, Shell Companies in Singapore and National Environment Agency. The Climate Change exhibition will see interactive displays educating the

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Setting common goals, implementing and monitoring the partnership (steps 3-7)	public sector on the various environmental issues that Singapore and the world face today. Highlights such as the mechanical Wayang Kulit show and Object Theatre Show called "The Climate Change Show" hopes to enlighten and entertain visitors. The Climate Change Show is a 20-minute, multi-sensory experience that drives home the serious issues of climate change in a humorous and exciting way, through visual and physical special effects. Narrated by Sheepie, a talking, animated sheep wearing rubber boots, this show will educate visitors on how and why our Earth is changing. In 2003, the Chemistry Exhibition made its first appearance with the aims of exploring the fundamentals and other aspects of Chemistry through exhibits, models, graphics and a range of other interactive and innovative presentation techniques. It helps to further stimulate general interest in science and covers six main areas – i.e. fundamental chemistry, it's a material world, phenomenal chemistry, reactive chemistry, chemistry in everyday life and chemical bar.