



A Partner Plan

A road map for Carleton University

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BACKGROUND

On a daily basis, Carleton University interacts with a broad range of partners, suppliers-vendors, organizations and associations. As such, our partners serve the university in a number of ways, depending on the complexity of the relationship that is in place. These partnerships range in complexity from the very simple – a strict vendor relationship – to multi-faceted and complex. The goal of this Plan is to encourage Finance and Administration to explore how, and whether, its partnerships can grow and develop beyond their original purposes to benefit both the university as well as the external partner.

This Partner Plan outlines the information to assist those within the Finance and Administration division who may be embarking on a new partnership, or those who

already have an established relationship but may want to explore the possibilities to take it to the next level.

This Plan has been developed with the input from a cross-functional group within Finance and Administration who have diverse experience with partnerships at various levels.

Defining the Partnership

There are a variety of ways that Carleton collaborates with its partners so that the university can get the most out of the relationship.

What is a supplier? A supplier-vendor provides a specific product or service to Carleton University (e.g. office supplies - Grand and Toy) and would not evolve into a two-way partnership.

What is a partner? A partner may provide a service to the university but there may be the capacity within that agreement to progress beyond it into other areas that benefit the university, as well as the external partner. We recognize there are levels of partners and depending on the nature of the business need and the extent of the collaboration, that not all partnerships have the same potential for growth.

What Guides Us?

The **Broader Public Sector Service Directive** dictates that any purchases by a university exceeding \$100,000 must have a formal open competitive bid process and the RFP process is the first step of that formal process. The RFP is listed on a public bidding platform, known as MERX, for a set period of time. Bids received are evaluated against the established criteria to determine the preferred supplier.

The RFP may also be used for expenditures under \$100,000 for delivery of complex products or services or to provide alternative options or solutions.

For more information: <http://carleton.ca/facts/glossary/r/request-proposal-rfp/>

Our Partnerships

Across the Finance and Administration Division there are wide-ranging external partnerships which meet a broad number of needs. This section explores a number of suggested ways you can engage your partners, keeping in mind that there are a

number of levels of partnerships. A partnership may be new, formal, casual or well established. The general information below is intended to provide some tips to growing your partnership regardless of its level.

How Do We Engage Them?

Carleton University has partnerships with a wide-range of external organizations and companies. Below is a sample of the number of ways the university has engaged and has participated in cultivating those relationships.

- Regular and direct contact/meetings/conference calls (two-way communication)
- Improvement through feedback mechanisms
- Participating as an active member in the partnership (planning sessions and/or committees)
- Carleton University as a pilot site for testing of new products and initiatives
- Participation in conferences to showcase the partnership and the benefits realized

Key Elements of a Successful Partnership

In order to fully develop a successful partnership, there are some key elements to keep in mind for consideration as you cultivate and explore ways to grow your partnerships.

- Aligned vision and goals
- Joint planning meetings and initiatives
- Explore ways to innovate
- Clear understanding of customer/audience
- Solicit feedback with a view to improving
- Transparency
- Meets the needs of both the university and the third party
- Reinforces Carleton's values as outlined in the university's Strategic Integrated Plan (SIP)
- Trust
- Access to key contact people
- Two-way communication

- Availability to subject matter experts
- Supports a Best Value approach: performance-based versus specification-based
- Knowledge sharing

How Can We Benefit from Partnerships?

There are any number of ways that Carleton University can benefit from having strategic partners. The key is to explore the possibilities through communicating with your external partner.

- Access to external expertise and the opportunity to shape policy that has positively impacted the university
- Influence product/software development to best suit Carleton's needs
- Potential employment opportunities for our students
- Research opportunities for our faculty and students
- Experiential learning opportunities for our students
- Competitive pricing
- Training opportunities
- Information exchanges
- Participation on external committees
- Access to new software
- Creation of academic chairs
- Innovation

What Can Success Look Like?

A successful partnership has the potential to grow beyond its original purpose and provides the space to explore exciting possibilities.

- Research opportunities: Facilities Management and Planning partnerships have resulted in Engineering students working with Delta controls on research projects, Science faculty and students collaborating on research projects with Environment Canada)
- Our partnership with Aramark has developed into employment opportunities for our students, support for the university's Healthy Workplace initiative, co-op positions, support for sustainability efforts on campus, dietician services, Aramark

staff attend Finance and Administration town halls so they are aware of our needs/priorities and externally, Aramark and Carleton support initiatives to assist the homeless.

- Our longstanding relationship with Western Union Business Solutions has led to Carleton having representation on its North American advisory board. As a result, Carleton has influenced product development, is a testing ground and has provided feedback on products.
- Cloud computing project – partnering with Microsoft, but also turned into university initiative around Big Data
- The potential to develop partnerships outside Finance and Administration
- Improved customer experience
- Better products developed to meet Carleton's needs
- Identify gaps to solve challenges

Opportunities and Challenges

As with any relationship, you can explore endless possibilities and/or challenges. How do you deal with these? How do you recognize them?

Opportunities:

- Better pricing
- Training opportunities
- Access to new technology
- Whether the partnership could be broadened beyond Finance and Administration to other areas on campus
- Ask: Could this be a partnership? What potential is there?

Challenges:

- How do you grow the relationship/partnership?
- Ensuring both parties share a similar vision for the partnership
- Building trust
- Determining what the right opportunity is?
- What do you do with a partner?
- Measuring success/value to both parties
- Strong and successful relationships require work

- How to evaluate the partnership and if it is working and how often
- Is the partnership changed and is it worth continuing? How to exit?

Building Relationships with Partners

There are many ways to build a partnership, maintain it and learn from it. Below are some of the key considerations that go into creating the foundation for a strong partnership.

How Can You Build A Partnership?

Below are some areas to consider when you are building your partnership.

- What does the company bring to the table for Carleton University? What other avenues can be explored?
- What does the future hold for that particular industry? Future commitments for Carleton?
- Tap into industry experts, industry associations
- Have the discussion: What can you bring to Carleton University? Why do you want to work with Carleton University? What does the external partner expect from Carleton University?
- Establish expectations

How to Determine Future Needs

What are your goals in working with this partner? What would be the possibilities?

Below are some tips about how to get there.

- Establish two-way communication
- Review existing partnership on regular basis so relationship evolves to best reflect needs
- How complex is the relationship/partnership?
- Transparency
- What are other universities doing?
- Best value for Carleton University
- Provide each other feedback

Potential Areas for Joint Initiatives

Can this partnership go beyond Finance and Administration? Is there another department or faculty on campus that could benefit from this relationship? Below are some points of consideration.

- Research/development of products
- Participation in new ventures
- Innovation
- Presentations at conferences about the partnership and how it has benefited both parties

Next Steps

This document outlines what to consider when you are exploring partnerships that may have the potential to grow into a two-way relationship that both parties work in consort to best serve our customers. While this Partner Plan is for Finance and Administration, we hope, in the future, will inform a best practice across the university. There is more work to do but we already know the possibilities are exciting and plentiful, both for Carleton and our external partners.

This plan was finalized in January 2016 and future considerations include:

- Determine what the linkages are to annual planning cycle
- How to showcase major partnerships
- Further engagement
- Awareness about the plan and existing RFP process
- Transparency