



Partnerships

“You like potato and I like potahto. You like tomato and I like tomahto. Potato, potahto! Tomato, tomahto! Let’s call the whole thing off.”

By Dan Zahlis

Written by Ira and George Gershwin, and made famous by Fred Astaire, this verse finds its way into our email inbox on a regular basis. Not too surprising, given the global nature of Active Agenda and the wide variety of terms used to describe risk control practices around the globe. However, we frequently see this verse used to express terminology differences between our English-speaking, and even our U.S. participants. This is especially true for the Partnerships module.

A “partnership” in Active Agenda is a “written program,” “compliance program,” “safety program” or is sometimes referred to as a “policy.” In Active Agenda, a “policy” is a mandate, and a “partnership” is a process of implementing, or satisfying, a policy. Active Agenda has a Policies module to track organizational requirements and a Partnerships module to track the people, practices and processes used to satisfy policy expectations.

We chose the term “partnerships” years ago, while using manual systems to satisfy internal and government requirements. The term “partnerships” evolved as a practical reflection of how we achieved success. Our best efforts always were the product of cross-functional teams of people, at all levels of the organization, and frequently included service providers and government agency representatives. Our most successful “programs” were inevitably the result of a partnership between many stakeholders.

These cross-functional partnerships became so successful, it wasn’t long before a stack of compliance manuals was reduced to a single binder. We called the binder the Partnerships Manual and today, we author these part-

nerships collaboratively in the project wiki – for the world’s benefit.

Organizations deploying the Partnerships module begin by adding every policy of their organization into the Policies module (not just the safety stuff). This is achieved by entering key details about the policy (i.e. scope, purpose, commitment statement, leader, etc.). Once a policy is entered, the written document can be attached and shared across multiple operating units.

The next step is to add all of the specific, and actionable, expectations to the policy. Once a policy record is established, distributed facilities can begin implementation of Partnerships designed to comply with the policy expectations across the organization.

When made aware of a policy requirement, distributed facilities can select the policy from within the Partnerships module. As they accept responsibility for implementing the policy, they assign local accountability for implementation, but it doesn’t end there. Every expectation entered into the respective policy is automatically included in the partnership record, and a specific local person can be assigned accountability for each expectation. The local facility also can enter local expectations to track accountability for their unique local differences.

Where there’s policies and expectations, there’s audits. These audits come from many sources and exist in many formats. To address this sometimes-disruptive operational reality, Active Agenda uses a Partnership Audits module. This module is used by a facility to establish a partnership goal and score each expectation based on the present state of implementation. As a new partnership audit is entered into the system, all of the shared and local

expectations automatically appear in a list to be scored by the auditor, along with the names of specific people accountable for each expectation. As expectations are scored, they are averaged and compared against the facility goal.

What Gets Measured

The Partnerships module tracks the programs in place to satisfy internal requirements, governmental mandates and even standards compliance. The list of programs and expectations being managed often comes as a surprise to leadership when they see the quantity of work displayed as a pie chart. The surprise can be even greater when it becomes obvious that work is not evenly distributed and likely to be underperformed or not being performed at all.

What Gets Done

The Partnerships modules allow organizations to improve performance against internal and external expectations and share their efforts within a centralized repository. These modules also allow organizations to reduce the waste and inefficiency often associated with many disparate audit processes.

Active Agenda’s ability to transfer accountabilities between people improves business continuity by reducing the opportunity for expectations to be abandoned.

This Month’s Links:

- **Wiki:** http://www.activeagenda.net/documentation/index.php?title=Partnership_Manual_Table_of_Contents
- **Forum:** <http://www.activeagenda.net/discussions/viewforum.php?f=62>
- **Demo:** <http://demo.activeagenda.net/list.php?mdl=par>

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