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CROSS-SECTOR PARTNERSHIP GUIDELINE

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Research and analysis by Deloitte.

Contributors to the proces:

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INTRODUCTION

The world is rapidly changing, and threats to people, livelihoods, and the environment, are complex and increasingly interlinked.
Cross-sector partnerships are today seen as key to achieving sustainable development and therefore central to the achievement of the UN Sustainable Development Goals. Partnerships across sectors are a means to tackle the complex social and environmental challenges our world faces.

Partnerships also provide new opportunities for business and organisations to pursue value creation by aligning objectives, recognising the specific competencies that each sector can bring to the collaboration and finding ways to harness these and create shared value for all.

Through partnerships, partnering organisations can help develop society and economies by pursuing a range of value-driven opportunities and outputs, e.g. gaining access to new technology or markets, acquiring new competencies, stronger impact of projects, enhanced cost-effectiveness, improve stakeholder relations, strengthen product development and mitigating risks.
The opportunities are endless.

Nevertheless, cross-sector partnerships are complex to manage. Consequently, partnerships do often not achieve their full potential, thereby strengthening the general reservation against entering into them. Building mutually rewarding partnerships is an iterative process and evolving journey. Partnerships are dynamic in nature and unlocking the potential requires strong management, solid relational skills as well as trust between the partnering organisations.

Typical characteristics of successful cross-sector partnerships include:

- Engagement to solve shared challenges or realise common opportunities.
- Core competencies as the primary resource of each organisation.
- Significant relevance to the organisational mission and strategy of each partner.
- Recognition that each partner brings valuable contribution to the partnership.
- High value-add and change potential for each organisation involved.

How to use this Guideline

This Guideline is for you who wish to try - or has already tried - your strength against cross-sector partnerships, and could use support or guidance on specific challenges or methodologies.

The Guideline provides you with essential guidance for overcoming typical challenges and to get started with your cross-sector partnership by offering you a methodology and tools for building robust and value-adding partnerships at the global, regional, national and /or local level.

When to use the Guideline

- If you wish to enter into a cross-sector partnership but have limited experience with partnering
- If you have already initiated one or more partnerships, but could use some practical guidance going forward
- If you would like to know more about the best way to do it and what common pitfalls to avoid

You can choose either to go through all of the nine themes of the Guideline one by one, or simply to pick out the theme and tool that will support you in solving a specific task in your partnership.

The Guideline does not set out a linear, prescriptive route, but is designed to support an iterative partnership process, where you might have to visit and re-visit each theme several times, depending on where you are in your project cycle and how your partnership evolves.

Background and further reading

The Guideline is the product of a comprehensive multi-stakeholder collaboration deriving from the 3-year DANIDA funded project "Future Partnerships Models for Strategic CSR" running from 2014-2016 comprising more than 30 organisations, including the partner organisations: CARE Danmark, Danish Red Cross, Grundfos and Coop Denmark. The project has been facilitated by the Danish Red Cross together with Deloitte Sustainability.

The project has primarily focused on analysing cross-sector partnerships between business and civil society organisations (CSOs) at large, however the methodology and tools presented in this Guideline as the product of this project can easily be expanded to all types of cross-sector partnerships.

Another product of the project is the Learning Report: Not Business as Usual – Partnerships between Civil Society Organisations and Business, where you can find further perspectives on how to develop, build and sustain successful partnerships between CSOs and businesses as well as global experiences with instructive models for cross-sector partnerships.

On the last pages of the Guideline, you will also find useful links and a broad scope of further reading within the field of cross-sector partnerships.

Happy reading!

Danish Red Cross & Deloitte Sustainability

GLOSSARY

CSO
Civil Society Organisation, a term that also includes non-governmental organisations (NGOs).

Cross-sector partnerships
Partnerships that include partner organisations from more than one sector; i.e. business, civil society, the public and/or government.

Beneficiaries
The individuals or group of people, who benefit from and/or receive the final output of a partnership, i.e. the target group.

MoU
Memorandum of Understanding.

KPI
Key Performance Indicator.

ROI
Return of Investment.

LogFrame/Logical Framework Approach
Methodology mainly used for designing, monitoring, and evaluating international development projects.

Local workers in the packery at the Sunripe Factory in Nairobi, Kenya.
Photo © by CARE DANMARK

SCOPING AND DEFINING THE PARTNERSHIP AND PROJECT

Why

Strong cross-sector partnerships have as their strength that they can harness the competencies and qualities of different organisations and sectors and thereby help to solve complex societal challenges, while creating shared value for all.

However, scoping a strong and value-adding partnership and project requires more than just a good idea or the desire to work together.

It requires a solid scoping process, where you thoroughly examine internal interests and objectives, carefully consider with whom to partner, and systematically build your understanding of the operational and organisational reality of you and your partners.

This is the basis for defining project activities, risks and targets.

A solid scoping process may serve the following purposes:

- Identify internal goals, interests and drivers behind the partnership
- Reduce potential risks and increase the rate of success
- Reduce the use of resources in the initial phase
- Design an initial partnership framework that hits the nail on the head by aligning with expectations of each partner organisation and the target group

How

Typical drivers behind cross-sector partnerships comprise internal opportunities, risks, demands, and expectations that are not easily mitigated/realised by one organisation alone. The internal goals and interest in your organisation must be defined before you start entering into dialogue with potential partners.

Likewise, a partner 'due diligence' should be conducted before you engage with a potential partner in order to identify potential risks related to the partner's governance, activities, products/services and supply chain.

The scoping process design typically expands through six key steps:

Step 1.
Define and understand goals and interests of your own organisation.

Step 2.
Identify, screen and assess one or more potential partners.

Step 3.
Draw up a first suggestion for a partnership design.

Step 4.
Conduct a 'sanity check' of your partnership design with key stakeholders.

Step 5.
Decide to proceed with the partnership or to reject it.

Step 6.
If you choose to proceed, formalise your partnership document.

Good advice

- Civil society organisations mostly focus on vulnerable groups in society, while businesses typically target stakeholders within their value chain. This difference can create challenges when it comes to identifying a shared objective and project design.
- Identifying the partnership potential does not happen from behind the desk. Go and talk to your organisation and assess the opportunities out there.
- Keep in mind that cross-sector partnerships are not 'business as usual' for any of the partners involved.

Downloads for further guidance
Guidance on Scoping and Defining the Partnership and Project
available online at access2innovation.com

BUSINESS CASE

Why

The purpose of building a strong business case as the basis for initiating any kind of partnership is to ensure top management buy-in and formalise the objective and partnership design between the partner organisations.

Equally, the business case helps create clarity and transparency on the individual value proposition for each of the involved partners.

The business case may serve the following purposes:

- Secure top management buy-in for the partnership and project.
- Describe the value creation for all partners involved.
- Create clarity and transparency of the drivers and reasons for initiating the partnership.
- Safeguard alignment between partners on the objectives of the partnership.
- Present budget, estimated return on investment and resources required.

How

Your business case is the result of the preceding scoping process that should result in a first draft for the partnership business case.

The business case is, like the partnership process itself, dynamic, and should be updated on a regular basis.

The business case should as a minimum describe the following key elements:

1. Value creation

- What is the purpose of the partnership, e.g. increasing the top line/bottom line, business devel-opment, reputation, expertise, relationships, market/technology access, funding etc.?
- What is the need/challenge/opportunity that makes this partnership worthwhile?
- Who are the key stakeholders/beneficiaries?
- What is the strategic, organisational, and resource fit between the partnering organisations?
- What is the shared and individual value creation for each of the partner organisations?

2. Project design

- What is the concept and what are the solutions proposed by the partnership and project?
- What are the project objectives and targets (output, outcome, impact)?
- What is the funding model?
- What do you expect in terms of invested output, outcome and impact?
- What is the investment forecast?
- What is the timeframe for the partnership and project?
- What are the key risks that might get in the way of achieving the objectives?

3. Viability

- How is involvement of the target group/beneficiaries ensured?
- How is strong alignment between all partner organisations ensured on a continuous basis?
- How can the partnership and project be scaled up?

Photo © by Deloitte

- How do you ensure a responsible handover/continuity after the project ends?
- How will learnings from the partnership contribute to organisational learning?

The joint objectives for the project should be complemented by clear project Key Performance Indicators (KPIs) that can be used to track progress and results of the joint project.
These should be documented in the business case and outlined in detail in your Project Monitoring and Evaluation framework, which should serve as your working document for monitoring and measuring progress and impact.

Good advice

- Start building your business case, already when scoping the project.
- Develop the business case in collaboration with all partner organisations to ensure alignment and transparency.
- Involve your operational organisation (or other departments that will inherit the project later on) already in the project scoping and design phase.
- Make sure to include project management costs when calculating the need for resources.

Downloads for further guidance
Business Case Guidance
available online at access2innovation.com

ROLES AND RESPONSIBILITIES

Why

The purpose of defining clear governance structures, lines of responsibility and authority for your partnership is for every partner to know exactly what they bring to the partnership, what to expect from the others, and what is to be achieved together.

A clear, documented governance structure can serve the following purposes:

- Create a positive and efficient relationship between partners.
- Identify relevant stakeholders.
- Increase the success rate of the partnership.
- Minimise disputes, misunderstandings and inefficiency within the partnership.
- Avoid dominance of certain partners.
- Ensure accountability for activities.
- Serve as a governance document to revert to if challenges arise, including if there are changes in staff during the project.

How

There is no one-size-fits-all governance structure for all partnerships. Partnerships might comprise two partners or multiple partners across sectors, and you should scale your governance structure to fit your partnership.

In order to be successful, partnerships rely upon a range of important 'people skills' among partners. It is recommended that these skills be taken into account, when you appoint the partnership manager.

Among these people skills are;

- Ability to share other perspectives
- Listening and communication skills
- Relationship and trust building
- Advocacy and networking skills
- Facilitation and mentoring
- Mediation and conflict resolution experience

Depending on the nature and complexity of the partnership, the suggested organisational structure comprises 2-3 levels, described in the below:

Level 1: Strategic

The Governance Group is a strategic function / steering group or similar body comprising representa-tives from all partners involved. This group is overall responsible for achieving the objectives of the partnership. Participants at this level must play a central role in their organisation and have the man-date to decide on major changes and resources, as they are responsible for high-level decision-making in the partnership. A primary responsibility of the Governance Group is to ensure ongoing management involvement and top management buy-in from the involved partner organisations.
The strategic level oversees the Memorandum of Understanding / Partnership Agreement document.

Level 2: Tactical

The Partnership / Project Group assumes responsibility for progressing the joint project and complet-ing the tasks set in the project plan. Level 2 should preferably comprise one project manager from each organisation, including local

partners, with the mandate to act and make day-to-day decisions. Progress made by the Project Group feeds into level 1. The group should agree on a 'modus operandi' with fixed and regular meeting intervals. The tactical level manages the Project Plan.

Level 3: Implementing

The Implementing Group ensures the execution of the various activities and deliverables specified in the project plan. Level 3 comprises representatives from all the local partners and they report directly to the Project Group.
At the implementing level, each partner implements their respective Terms of Reference/Agreed work.

Good advice

- Distribute roles and responsibilities clearly – there must be no doubt, who does what.
- Develop a formal partnership agreement document such as a Memorandum of Understanding to document commitment and distribution of roles and responsibilities.
- Keep the project structure as simple as possible, yet reflecting the number of partners involved.
- Personal relationships are essential as these ensure trusting and open dialogue on challenges and potential conflict.
- Over time, the people working on the project might change. A strong governance document should enable others to step in and take over.

Downloads for further guidance
Roles and Responsibilities Guidance Document - incl. stakeholder analysis and governance structure
Memorandum of Understanding/Partnership Agreement Template
available online at access2innovation.com

Diana Torrecilla and her children on their way to the Simon Bolivar Hospital, Barranquilla, Colombia.
Photo © by Novo Nordisk

RISK AND CONFLICT MITIGATION

Why

The purpose of working with risk and conflict mitigation is to apply a structured approach to identifying and mitigating the factors and influences that make it uncertain, whether the partnership and the joint project will achieve its objectives.

Risks associated with cross-sector partnerships are varied and plentiful, and they are easily forgotten in the enthusiasm for potential benefits from your new partnership.

Partnership risk and conflict mitigation can serve the following purposes:

- Increase the likelihood for the projects to achieve its objectives.
- Improve mutual stakeholder and partner confidence and trust.
- Establish a reliable basis for decision-making and project planning.
- Improve effectiveness, efficiency and internal collaboration between partners.

How

Effective management of your partnership and risks starts with a solid risk identification and risk assessment.
Most of the elements within this guideline comprise one or more risk management activities, i.e. activities that either help to identify risks, assess risks or mitigate risks.
Risk management should be an integrated part of your partnership due diligence, both when you initiate the partnership and when you manage the partnership on a continuous basis.

The general concept of a risk assessment is that you start by identifying a long list of risks that link to the different areas and activities of the partnership and project cycle. Some of these will be important and others will not.
You should focus on understanding and reducing the few very important risks and less so on listing all possible risks.
Be open to the fact that different organisations can view these risks differently.

Typically a risk assessment comprises four main steps:

Step 1.
Understand your risk profile

Step 2.
Analyse your most important risks

Step 3.
Decide on how to best mitigate these risks

Step 4.
Mitigate risks

Responding to crises or disputes
The process of engaging in cross-sector partnerships does not always go smoothly, and it often depends heavily on the motivation of the people involved.
If you show trust and demonstrate transparency towards your partners, many conflicts can be managed through informal discussion.

In some cases, as a last resort, you may need to resolve significant disputes by using a formal process.
It is advisable that you establish a process for this when you initiate the partnership and describe this in your Memorandum of Understanding / Partnership Agreement.
Consider also to include a mediation provision.

Typically, a mediation provision comprises two steps:

1. In case of significant conflict between you and a partner, you meet with the highest management level in either partner organisation to settle the dispute amicably.
2. If this does not work, you engage an external party approved by both sides to mediate between you and your partner.

If a dispute cannot be settled amicably, you should consider terminating the partnership, as you will probably not be able to re-establish the necessary trust between you and your partners.

Good advice

- Include all partners in the risk assessment process, as this helps you to build risk awareness and openness, and to jointly identify risk areas that you might not have foreseen.
- Make sure that all new agreements between you and your partners are clearly written, easy to find and understood in the same way by all partners.

Downloads for further guidance
Risk Assessment Guideline
Memorandum of Understanding/Partnering Agreement Template
available online at access2innovation.com

PARTNERSHIP AND PROJECT COMMUNICATION

Why

The purpose of working systematically with communications, as a part of your partnership is to align, show support and plan the messaging around the partnership, and to facilitate effective and efficient communications with and between internal and external stakeholders.

Effective communication can serve the following purposes:

- Create public awareness and goodwill on the partnership and project.
- Strengthen reputation and brand of the partnering organisations.
- Enable strong personal relations, alignment and trust between partners.
- Display support from management as to why the partnership is important to the organisation.
- Ensure proper timing and relevance of the communication.

How

From the start, it is important that you have in place a clear plan for communication about the partnership.
A communication plan and targets should support the achievement of the overall objectives of the partnership.

Different levels of communication:

Communicating internally / externally on the partnership itself
E.g. issuing articles announcing that the respective partners have joined forces etc.

Communicating internally / externally on the joint project that you implement
E.g. communicating progress and results of the joint project to build internal and/or external awareness.

Communicating within the project team
E.g. day-to-day communication with your partners ensuring trust, transparency and efficient collaboration.

Communicating internally to ensure organisational support, buy-in and ownership
E.g. internal communication to ensure that the organisation is onboard, showing the organisational value, while displaying management's commitment to the partnership and joint project.

The same four-step process applies for both internal and external communication;

Step 1:
Define who your key audiences are

Step 2:
Identify key messages to that audience

Step 3:
Design your tactical outreach plan aligned with targets in order to reach the audience

Step 4:
Develop your communication materials and implement the outreach plan

Communicating change
Cross-sector partnerships challenge 'business as usual' and bring changes to each of the partnering organisations. With this outset, it is critical that the partnering organisations verbalises this process of change, and actively communicate that this partnership requires an extraordinary effort. To challenge 'business as usual' requires strong backing from top management, which must be consistently communicated – in words and action.

Internal project communication
Sectors typically have different ways of communicating and collaborating, which can be a challenge for a joint Project Group. Internal project communication is key to overcome these challenges, as it helps you build a shared language that enables openness, alignment and trust between partners. Taking the necessary time to build strong personal relations between the partners cannot be emphasised enough.

When you initiate the project, you should agree on a 'modus operandi' for the project group that clarifies fixed meeting intervals, agenda items, meeting minutes, responsibilities, joint tools and platforms etc. to use for communicating.

Good advice

- Agree on how to build an approval process for external communications ensuring proper repre-sentation of all views.
- Make sure to involve communications officers early in your process, if you have them in your organisation.
- Focus on continuously communicating and explaining the project within each organisation to keep the interest alive – remember that results may only be visible in a long-term perspective.

Downloads for further guidance
Communications Plan Template
available online at access2innovation.com

Midwives Sangwani Chima and Gloria Beza in Lunjika, Malawi.
Photo © by Folkekirkens Nødhjælp/ Francis Botha

COMMUNITY ENGAGEMENT

Why

The purpose of conducting local community engagement is manifold in a cross-sector partnership. It helps you to gain a deeper understanding of the envisaged needs and readiness of your target group towards a potential solution, build a 'social license to operate' in the area you want to be present in, for example by involving local gatekeepers and agents of change who can influence your project either negatively or positively.

In partnerships implementing local projects, a partner from the business sector often seeks a partner with strong community outreach capabilities in a specific geographical area of the world.
This is often the 'home turf' of civil society organisations (CSO), who work systematically with community engagement and therefore are obvious partners for those businesses or other organisations who do not themselves have this capacity.

Solid community engagement activities may serve the following purposes:

- Identify local structures / actors that are affected by and/or can affect the project positively or negatively.
- Be informed about local needs, concerns, risks, opportunities and potential solutions.
- Understand the readiness of the target group towards accepting your solution.
- Strengthen relations and understanding between the Project Group and community members.
- Ensure community commitment and ownership of the project and its outcomes.

How

There are many ways to go about community engagement and outreach in your project.
The potential local partner organisations should always have a major say in setting the implementation plan and adjusting the action plans to match local circumstances, as they know what it takes to gain a 'social license to operate' in a particular area, while having the local network to mobilise community members and other relevant actors and agents of change, if relevant.

Local actors and agents of change can include local authorities, religious leaders, township or village representatives, local NGOs or UN agencies.
Engagement activities can range from briefings, informal discussions and meetings in groups or one-on-one, to more formal community consultation processes, e.g. through surveys, meetings and hearings.

It is a good idea to identify collaboratively where in your governance structure the local stakeholder groups might play a primary role and should have a voice, i.e. at the strategic, tactical and operational levels.

Scoping your discussion on community engagement can follow a simple process:

Step 1.
Map out all relevant community groups and other actors

Step 2.
Identify and agree on stakeholders for community engagement

Step 3.
Decide on a plan and methods of engagement

Step 4.
Follow up and share relevant information with the rest of the partner group, when relevant

All partners should strive to take some part in the community engagement activities, in order to strengthen the general knowledge and understanding within the partner group on local conditions, barriers and opportunities.

Good advice

- Involve all partners in the decision on whom to engage, how to engage and what input to collect.
- Consider including the community dialogue as part of your project monitoring and evaluation process.
- Establish a clear communication flow for sharing input from the local community and the local organisations to the rest of the partner group.
- Identify whether there is already a local government strategy for the particular area you are trying to address, e.g. water or health or environment strategy.

Downloads for further guidance
Community Engagement Assessment Process
available online at access2innovation.com

RESOURCE MANAGEMENT

Why

The purpose of managing resources for your partnership is to support the achievement of objectives, increase efficiency while monitoring, and documenting the resources used. Poor resource management leads to poor outcomes and potentially dries up your resources in the longer run.

Strong resource management can serve the following purposes:

- Ensure transparency of financial decisions and agreements in the partnership.
- Safeguard equitable distribution of costs and contributed resources by each partner.
- Support the achievement of objectives and documentation of the resources used.
- Ensure accountability and reassurance to partners and third party funders.

How

Cross-sector partnerships typically rely on many different types of resources; e.g. in-kind, finance, human resources, access, knowledge / data etc.
All of these resources can be crucial contributions to the partnership. However, if you have not specified the value and expectations for each partner in terms of resources, and you have not defined clear responsibilities in the MOU/ Partnership Agreement and governance structure, then resource management can potentially be a big challenge.

To get an overview, all resources should be valued and quantified into either man-hours or monetary terms, which will make it easier to manage and monitor resource use and distribution.

Ideally, resource management is part of your Monitoring and Evaluation framework, defining the methodology for monitoring project progress, resources and risks.

Partnerships can make use of very different funding models that as a consequence require different levels of resource contribution and disclosure, e.g.:

- Third party funding, e.g. from foundation, institutional donor, venture capital etc.
- Funding contributed partly by third party and partly by the partner organisations
- Funding contributed only by the partner organisations

Operating a partnership based on a third party funding often requires an independent project organisation and resource management.

The guiding questions below are primarily relevant for addressing resource risks in partnerships that are third party funded or in your own organisation's management of partnership finance:

1. Initiation
1.1 Operating budget:
- Who develops and approves the operating budget?
- Who operates bookkeeping, manages interim accounts and the final project account?

- Who approves expenses and issues invoices?
- Who is responsible for registering and paying duty, VAT and taxes correctly in the countries, where the partnership has activities?
- What is the scope and frequency of external audit and reporting, if relevant?

1.2 Cash flow budget:

- Who develops and approves the cash flow budget?
- Who is given the power of attorney to open bank accounts?
- Who pays bills and transfers funds?
- Which expenses are accepted without documentation?
- What is the maximum amount accepted without documentation, if relevant?

2. Implementation – development of interim accounts:

- Who receives and approves interim accounts?
- Who has the mandate to demand an upgrade / adjustment if the operating or cash flow budget, if necessary?

3. Closure – development of final project account showing results after project closure:

- Who approves the final project account and closes the project financially?
- Who has the power-of-attorney to close bank accounts and transfer any residual cash?

Good advice

- Allocate an extra buffer for project management, as it often requires more time than expected. Address it in the budgetary discussions with your partners, if relevant.

Downloads for further guidance

Finance Management Guidance for Third Party Funded Partnerships
available online at access2innovation.com

Maasai waiting outside Lifelink installation in Kenya.
Photo © by Jakob Dahl

PROJECT MONITORING AND EVALUATION

Why

Monitoring and Evaluation (M&E) is an important part of the successful management of a partnership, as it strengthens the basis for monitoring resources, results and risks, fosters learning in the partnering organisations, and supports the public accountability of the project.

Monitoring and evaluation are two different disciplines – but closely interlinked.
Monitoring allows you to continuously check and document factual results, processes and estimated impact, and use this as a basis for future decision-making and learning.
Evaluation allows you to assess and evaluate progress, results and learnings from the project.
You use the data gathered through the monitoring process for the evaluation.

M&E may serve the following purposes:

- Ensure organisational learning and improve future activities and practices.
- Serve as a basis for dialogue on progress between partners and the target group.
- Ensure that the project is on track and in accordance with the set targets.
- Form basis for informed decisions on the future of the joint project.
- Enhance understanding of the broader value-add and risks of the partnership / project.
- Show accountability of the resources used and the results and impact obtained.

How

Among different partner organisations, CSOs are typically accustomed to conducting comprehensive M&E, due to requirements from e.g. the EU, DANIDA, and other donors. On the other hand, businesses rarely conduct the same type of comprehensive M&E processes.

This makes it important to agree on the ambition level and scope of the M&E, when defining the project. In addition, make sure that you leverage the M&E expertise of the CSO in a relevant way, and that you agree on how M&E activities are compensated in the project budget.

In the scoping process of the partnership, you should design an M&E framework, which meets the reporting needs of each partner organisation, and if relevant, donors and other stakeholders.

You typically go through four key steps when defining an M&E framework:

Step 1.
Identify Key Performance Indicators, impact targets and scope of M&E activities

Step 2.
Set up a system to collect data and information within the defined scope

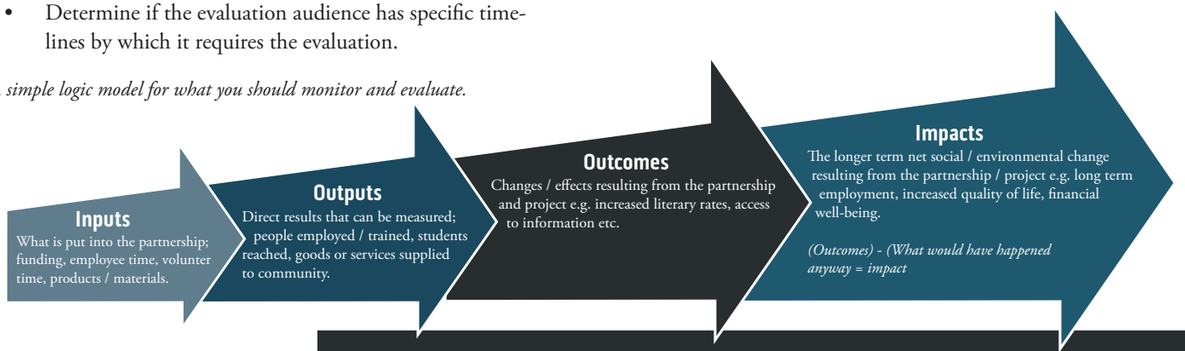
Step 3.
Collect data and document inputs, output and outcomes

Step 4.
Analyse data and evaluate significance of outcomes against KPIs and impact targets

Good advice

- Consider having a third party provide advice and / or conduct the monitoring, if needed, to ensure the right expertise.
- Leverage the methodology and competencies of the CSO within M&E, if relevant.
- Determine if the evaluation audience has specific timelines by which it requires the evaluation.
- Keep in mind that there are typically issues that bring about a significant positive impact, but which are impossible to measure or to attribute directly to your project.
- Remember to incorporate risks and unintended and/or negative impacts into the M&E process.

A simple logic model for what you should monitor and evaluate.



Downloads for further guidance
Project M&E Guideline
available online at access2innovation.com

PARTNERSHIP EVALUATION

Why

The purpose of conducting an ongoing or final evaluation of your partnership is to capture important learnings, which can strengthen future activities and the relationship between partners going forward.

Evaluation is also a way of expanding learnings from the partnership to other parts of the organisation.

Partnership evaluation focuses on assessing the collaboration between the organisations working together, the experiences and areas for improvement.

A partnership evaluation can serve the following purposes:

- Capture learnings that can improve the relationships of the parties involved in the partnership.
- Provide learnings that will strengthen the partnership and activities going forward.
- Provide recommendations for changes in roles and responsibilities to ensure that the right competencies are present.
- Support discussions to manage potential disagreement or conflict.

How

All partners who have been part of the partnership, should take part in the evaluation process of the partnership in order to capture all perspectives and relevant learnings.
It can be a valuable exercise to evaluate the collaboration continuously e.g. through a workshop with all parties.

As a minimum, evaluation should take place once a year and by the end of the project.

There are many methods for conducting partnership evaluation, e.g. as a face-to-face discussion, interviews, by issuing a survey or using questionnaires.
Keep in mind that cultural differences might make one evaluation method a better choice than others.

Direct face-to-face discussion might not be the best approach in all cases, as the setting might refrain some people from giving their true opinion.
Choose a format that will make it possible to ask detailed questions and illuminate specific partnership experiences and observations, both positive and negative.

The headlines below take you through the main themes structuring a typical cross-sector partnership:

Thematic evaluation:

- Strategic fit
- Roles and responsibilities
- Resources management
- Decision-making and leadership
- Work processes
- Communication and transparency

Partnership evaluation usually takes place periodically and by the end of the project.

Good advice

- Consider having a third party conduct the partnership evaluation to keep facilitation neutral.
- Be open to constructive critical feedback – both from within your own organisation and from the other partners.
- Inspire openness towards what others perceive as good practice, challenges, and disappointments – this helps you and your partners do better in the next partnership.

Downloads for further guidance
Partnership Evaluation Framework
available online at access2innovation.com

USEFUL LINKS AND FURTHER READING

Business for Social Responsibility (BSR)
http://www.bsr.org/

The Sustainable Development Goals Compass Guide
http://sdgcompass.org/download-guide/

UN Global Compact
https://www.unglobalcompact.org/

UN Guiding Principles for Business and Human Rights
http://business-humanrights.org/en/un-guiding-principles

World Business Council for Sustainable Development (WBCSD)
http://www.wbcsd.org/home.aspx

Kayanza villagers unloading goods at lake Edward on the border between Uganda and DRC.
Photo © by access2innovation/ Jakob Brodersen

Further reading

United Nations Global Compact – UN Business Partnerships: A handbook
https://www.unglobalcompact.org/library/361

United Nations Global Compact LEAD – Partnership Fundamentals: A 10-step guide for creating effective UN-Business partnerships
https://business.un.org/en/documents/10052

International HIV/AIDS – Toolkit: pathways to partnerships
http://gametlibrary.worldbank.org/FILES/459_Partnership%20Handbook.pdf

OECD LEED forum on partnerships and local governance: successful partnerships – a guide
http://www.oecd.org/cfe/leed/36279186.pdf

Global Environmental Management Initiative and Environmental Defense Fund: Guide to Successful Corporate-NGO Partnerships
http://gemi.org/wp-content/uploads/2015/02/GEMI-EDF-Guide1.pdf

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