TOOL 1

PARTNER ASSESSMENT FORM

A 'prompter' enabling those creating a partnership to ask systematic questions of any potential partner to ensure a good fit with the goals / needs of the partnership. This tool should be used as a starting point for exploring a potential relationship by providing a basis for frank discussions with the key players involved at both senior and operational levels. It is designed to raise appropriate questions - not to provide definitive 'screening'.

DOES THE PROSPECTIVE PARTNER ORGANISATION HAVE…	CURRENT STATUS A review of: • What you know so far • The reliability of your sources of information • Whether you have enough information upon which to base a decision	FURTHER ACTIONS A note of: • Further information required • Remaining concerns • Timetable and criteria for making a decision about suitability
1. A good track record?		
2. Reasonable standing / respect within their own sector?		
3. Reasonable standing / respect from other sectors and other key players?		
4. Wide-ranging and useful contacts they are willing to share?		
5. Access to relevant information / resources / experience?		
6. Skills and competencies that complement those of your organisation and / or other partners?		
7. Sound management and governance structures?		
8. A record of financial stability and reliability?		
9. A stable staff group?		
10. Sticking power when things get tough?		
ARE THE STAFF IN THE PROSPECTIVE PARTNER ORGANISATION . . .		
11. Experienced and reliable in the development of projects?		
12. Successful at mobilising and managing resources?		
13. Good communicators and team players?		

TOOL 2

1. Individual leaders' intentions, attitudes and commitments

- Do I view the partnering approach as crucial to achieve our goals?
- Do I believe that my partners want the partnership to succeed?
- Am I committed to the outcomes of the partnership?
- Am I willing to challenge my assumptions?
- Do I value the differences among us?
- Do I trust my partners to make appropriate decisions on my behalf?

2. Individual leaders' behaviours

- Am I an advocate for the partnership approach?
- Do I listen actively to my partners?
- Do I adhere to the partnership's principles?
(e.g., equity, transparency, mutual benefit) in my daily behaviour?
- Do I seek and give helpful feedback from / to my partners?
- Do I follow through on my commitments?
- Do I show respect for my partners even when they are not present?
- Do I support the development needs of my partners?
- Do I acknowledge my partners for their accomplishments?

3. Partnership's mindsets, values and norms

- Do we share an understanding of the benefits and risks of partnering?
- Are we aligned around a shared vision and shared values?
- Do we freely share our ideas even when they are at odds with others?
- Are we open to changing our viewpoint about other stakeholders?
- Are we giving each other the benefit of the doubt?
- Have we developed a culture of transparency among ourselves and around the partnership?
- Are we continually looking for opportunities to learn, change, and improve?

4. Partnerships' structures, systems and strategies

- Is our partnering agreement clear and well understood by everyone?
- Are incentives in place for the partners to think and act for the benefit of the partnership?
- Do we have the skills, competencies and technologies to succeed in our joint efforts?
- Do we have the structures and ground rules in place to work effectively together?
- Are we freely sharing information with our stakeholders?
- Are our strategic priorities clear to everyone concerned?
- Do we set and respect high standards of quality in everything we do?
- Are we bringing the best and most complementary resources to make the partnership successful?
- Do we institutionalise the partnership so that it can continue working without us?

Framework adapted from "A Brief History of Everything", Ken Wilber, Shambhala Publications.

TOOL 3

1.0 PARTNER ORGANISATIONS

1.1 Partner A
Contact details
Contact person

1.2 Partner B
Contact details
Contact person

1.3 Partner C
Contact details
Contact person

2.0 STATEMENT OF INTENT

2.1 We, the undersigned, acknowledge a common commitment to / concern About…

2.2 By working together as partners, we see the added value each of us can bring to fulfil this commitment / address this concern

2.3 Specifically we expect each partner to contribute to the project in the following way(s):
Partner A…
Partner B…
Partner C…
All partners…

3.0 STRUCTURES AND PROCEDURES

3.1 Partner roles and responsibilities…

3.2 Co-ordination and administration…

3.3 Working groups / committee(s) / advisory group(s)…

3.4 Decision-making processes…

3.5 Accountability arrangements…

4.0 RESOURCES

4.1 We will provide the following resources to
a) the partnership and
b) the project…

5.0 AUDITS / REVIEWS / REVISIONS

5.1 We agree to make available all information relevant to this partnership to partners as necessary

5.2 We agree to review the partnership every … months

5.3 An independent audit of the financial arrangements of the partnership(and any projects resulting from the partnership)will be undertaken on an annual basis

5.4 We agree to make adjustments to the partnership (including re-writing this agreement) should either a review or an audit indicate that this is necessary for the partnership to achieve its objectives

6.0 CAVEATS

6.1 This agreement does not permit the use of copyright materials (including logos) or the dissemination of confidential information to any third party without the written permission of the partner(s) concerned

6.2 This agreement does not bind partner organisations or their staff / officers to any financial or other liability without further formal documentation

SIGNED

_____
on behalf of Partner A

_____
on behalf of Partner B

_____
on behalf of Partner C

DATE _____

PLACE _____

TOOL 4

This questionnaire is designed for individuals involved in partnerships to assess their own partnering skills -in order to build confidence about skills strengths and strategies to address any skills weaknesses. It can be used by the partners as a group to build a picture of the competencies within the partnership and to identify which individual is best equipped to undertake which tasks / roles. It can also be a tool for enabling partners to recognise when specific skills might need to be brought in from outside the partnership.

ROLES ASSESSMENT (1 = low, 5 = high)

KEY ROLES IN PARTNERSHIPS	Assessment of current capacity in this area					Strategy for improvement (if necessary)
Partnership / project 'championship'	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Awareness raising	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Co-ordination / Administration	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Relationship management	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Resource mobilisation	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Project / programme planning	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Project / programme management	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Communications	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Monitoring	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Other (specify)	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	

SKILLS ASSESSMENT (1 = low, 5 = high)

KEY ROLES IN PARTNERSHIPS	Assessment of current capacity in this area					Strategy for improvement (if necessary)
Negotiation	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Mediation	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Facilitation	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Synthesising information	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Coaching / capacity-building	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Institutional engagement	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Institution-strengthening	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Evaluating / reviewing	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	
Other (specify)	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	

REMEMBER

Skills can be developed and roles can change over the lifetime of a partnership. The more each individual can develop their professional capacities and take on new tasks, the more they will feel engaged and valued within the partnership. Partnerships can work well because they provide new opportunities and allow individuals to get 'out of the box' of their day-to-day operational style.

Conversation for Generating Possibility

A Conversation for Generating Possibility is a conversation to envisage the future as a rich scenario of inspiring possibilities. It is about sharing creative and imaginative ideas. Questions of feasibility are of no concern at this stage. Rather, a Conversation for Possibility is intended to bring out intuitive and aspirational views of how the best possible future might appear.

A Conversation for Generating Possibility will be most appropriate during the early stages of the Partnering Process, when partners are working together to create a vision, but it can also be applied later on as the partnership is being renewed. It should be conducted as a brain-storming session around a set of specific strategic and open questions that encourage reflection and imagination, and do not elicit simple 'yes' and 'no' answers.

A Conversation for Possibility should continue for at least 15 minutes, although it could last up to an hour. Examples of suitable 'open' questions include:

What would a break-through in ... (insert theme or desired outcome) mean?
What would a break-through in ... (insert theme or desired outcome) make possible?
What are you / we building with this initiative?

Conversation for Generating Opportunity

A Conversation for Opportunity is concerned with generating concrete joint commitment for break-through action. It is a conversation about shared accountabilities. It is through such a conversation that partners arrive at agreement about which of the possibilities that have been created earlier constitute concrete opportunities for the future and could be realistically pursued by the partners.

A Conversation for Opportunity invites people to answer the following question:

What can you declare that at the end of this initiative would be a break-through?

Once this question has been discussed for at least fifteen minutes, partners can move on to develop a shared Partnership Commitment Statement (not to be confused with a Partnering Agreement). The Statement might begin with an opening statement such as:

We are / Our partnership is… committed to ...

Each partner is asked to write down what he/she thinks that the commitment statement should be. This is then shared with the other partners and the strengths (not the weaknesses) of each statement are discussed. The group will choose the statement they consider best to work on further and then continue to amend it together as a group until it adequately reflects the commitment of all partners, and everybody is fully satisfied.

Conversation for Generating Action

A Conversation for Generating Action can be held at all stages of the Partnering Process, whenever joint or individual action is required. It helps to clarify individual responsibilities and to create a common understanding of who is accountable for what. It also helps to take the Partnering Process a step further, turning possibilities and opportunities into concrete activities. The key opening question might be: *Who will take what actions, by when?*

It is recommended that written notes are kept of the individual commitments made and that these are copied to each partner. This will enable the partners to hold each other accountable later on.

Conversation for Completion

Being 'complete' with something means being 'whole' with it. Completion not only applies when terminating a certain process, but it is equally important that partnerships are complete on an on-going basis. This helps to promote understanding and create alignment between the partners. A Conversation for Completion can therefore be conducted at all stages of the Partnering Process. Partners can usefully ask themselves (and each other) the following questions and undertake further activities based on the answers given:

What is left to accomplish in order for us to say that the partnership has been successful or is finished?
What actions do we need to take to achieve this?
Who will do what, by when?

What promises or commitments have we made but not yet delivered on?
Who will do what actions, by when, to complete these?

Who wants/needs to be apprised of the status/outcome of the partnership?
What will we do to communicate this to them?

Who might be angry, annoyed, irritated or disappointed with us or with our activities?
How will we complete this with them?

Who has contributed to the partnership and its activities?
How will we acknowledge them and their contribution?

What else will we do to be complete (i.e., whole) with our initiative?

This is designed as a tool for reviewing the partnership to assess whether it is achieving the goals / expectations of the individual partner organisations. It is essentially a 'health check' of the partnership rather than a more formal audit of the project or programme the partners have undertaken.

AIMS	POSSIBLE ACTIVITIES
To offer partners an opportunity to reflect on the value of the partnership from their own organisation's perspective	• **1:1 conversations** with key players from each partner organisation undertaken by a nominated 'reviewer' that are then written up as a narrative for partners to discuss • **Group workshop** – run separately within each partner organisation – undertaking a SWOT analysis (exploring Strengths, Weaknesses, Opportunities and Threats in the partnership) which are then 'matched' across the different partner organisations • **Meetings in pairs** (2 individuals from different partner organisations meeting as 'critical friends') for a frank exchange of views that are then shared at a partners' meeting / workshop
To assess what – if any – changes would improve the effectiveness of the partnership	• **Change of focus** – can be explored through a 'futures workshop' or a 'scenario planning exercise' where partners are invited to do some 'blue skies' thinking • **Re-definition of roles and responsibilities** – partners invited to undertake a roles / skills re-assessment (see Tool 3) and re-assigning responsibilities between partners to tackle new tasks differently • **Institutionalisation** – engaging a larger number of people from the partner organisations in the partnership in new ways
To agree as a group to any revisions to the partnership agreement to take account of the findings of the review process	• **Re-writing the Partnering Agreement** to reflect new goals; changes of focus or new activities • **Expanding the partnership** – either by incorporating new partners or by publicising its activities and achievements and supporting others in creating similar initiatives • **Developing a termination or moving on strategy** – for the project, or the partnership, or one or more of the partner organisations. Moving on can mean 'job well done' it does not have to be interpreted as failure. A healthy partnership copes with closure / changes / departures in a creative and positive way

REMEMBER

It may be important for a number of reasons to publicise a partnership and / or its activities and these reasons need to be taken into account, but 'going public' too soon can put a lot of pressure on a partnership and can have some unexpectedly negative impacts. Partners need to assess the risks and benefits of publicising their work and ensure that all partners concur with and adhere to an agreed strategy.

TOOL 7

INFORMATION	Name of initiative, partner details, other stakeholder details, key dates, location
HISTORY	What key issues led to the partnership initiative? Who started it? What were the agreed core principles / values underpinning it? What were its aims and objectives? What were the first steps?
ACTIVITIES	What has the partnership undertaken? How were activities managed? What have been the outcomes and outputs to date? What more is anticipated?
ROLES	Who were the key individuals involved and what were their roles? How did they change over time?
ACCOUNTABILITY	In what ways is the initiative accountable? How is its impact / effectiveness measures assessed? How is the partnership reviewed? What is the process for making key decisions – including changes?
CHALLENGES	What have been the main challenges encountered during the partnership's lifetime? How have they been dealt with? What challenges remain?
RESOURCES	How is the initiative resourced (cash and non-cash in-puts)? Is there funding from any external source(s)? If so, from where and what proportion of the budget does this represent? To what extent are resources renewable and / or is the initiative sustainable? Now? At some stage in the future?
THE FUTURE	What are the immediate development plans? Are there longer-term plans in place? Do partners have a 'moving on' strategy? Does the initiative have a finite term of operation? What time-scale is envisaged for moving on or termination strategies?
ACHIEVEMENTS	What are the main achievements?
CONTACT DETAILS	Who can be contacted for further information and how?

REMEMBER

In conducting interviews with key people in order to access information don't forget to:

- Tell the interviewee(s) who you are and why you are asking these questions
- Use 'open' rather than 'closed' questions – open questions invite a description; closed questions invite a 'yes' or 'no' response
- Be an active listener – listen attentively and don't be mentally preparing your next question
- Write your notes during a break in conversation so that you are looking at the interviewee(s) and not at your notebook while they are speaking
- Feed back what you have heard to make sure you have understood correctly and to enable the interviewee(s) to add anything they may have forgotten.

TOOL 8

POTENTIAL AUDIENCES	COMMUNICATIONS OPTIONS	POTENTIAL MESSAGES
Partners ☐	Conversations ☐	*"We have learnt the value of working collaboratively - you should try it!"* ☐
Project staff ☐	Public meetings ☐	
Other staff in partner ☐	Workshops ☐	*"We have tackled a major issue and been more effective than other approaches that have been tried in the past "* ☐
organisations ☐	Capacity-building ☐	
Project stakeholders ☐	activities ☐	*"Our evidence demonstrates that this intervention has had real and positive impacts on those who need it most "* ☐
Project beneficiaries ☐	High profile events ☐	
Community group(s) ☐	Site visits ☐	
Non-partner donors ☐	Print media ☐	*"It is all a question of leadership and a determination to work together to make a difference"* ☐
Public figures ☐	Radio / TV ☐	
Policy makers ☐	Video / DVD ☐	*"This approach is cost effective and sustainable"* ☐
Local / regional / national government ☐	Internet ☐	
Potential new partners ☐	CD Rom ☐	*"This is a local solution to a local challenge"* ☐
National organisations ☐	Written case studies ☐	
Academic institutions ☐	Newsletters ☐	*"This form of collaboration allows for greater participation and empowerment for those we seek to help"* ☐
International agencies ☐	Publications ☐	
Other? ☐	Other? ☐	Other? ☐

⚠

REMEMBER

It may be important for a number of reasons to publicise a partnership and / or its activities and these reasons need to be taken into account, but 'going public' too soon can put a lot of pressure on a partnership and can have some unexpectedly negative impacts. Partners need to assess the risks and benefits of publicising their work and ensure that all partners concur with and adhere to an agreed strategy.