



The Partnership Toolbox



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The Partnership Toolbox

Introduction

The tools in this toolbox have been extensively used by WWF and its partners and the results show that this approach achieves impact through assisting the development and maintenance of robust, equitable relationships.

We have considerable experience within WWF on working in partnership. However we recognised that strengthening our partnerships further could lead to the achievement of greater impact. What was often missing in our work was the opportunity for reflection, and the ability to extract and capture the quality of our experience growing out of over 40 years of working in partnership. As a learning organisation WWF therefore invested in reflecting on how to develop effective, strong partnerships.

Our experience taught us that partnerships are essential to achieve transformational change at national and international levels, as well as achieving success in locally-focussed project delivery, which reflects the levels at which WWF operates. Weak partnership formation and unstructured, unclear relationship management, review and learning, can lead to misunderstandings, waste considerable time and effort and result in limited impact, missed opportunities and increases the potential for conflict.

A structured approach to partnership enables us to identify the type of partnership that is needed, to adapt and develop the partnership over time through monitoring, evaluation and learning in order for the partners to deliver shared objectives. The tools in this toolbox have been extensively used by WWF and its partners and the results show that this approach achieves impact through assisting the development and maintenance of robust, equitable relationships.

Through the use of these tools, WWF has built its own capacity on partnership working, and, as importantly, other organisations have been able to build their own capacity too.

These tools were originally developed by WWF-UK's Organisation Development Unit in 2001. A series of workshops were run to explore the concept of our working relationships with other organisations. These workshops were facilitated by Rod Sterne (WWF-UK) and Bruce Britton (INTRAC Associate), and focused on capturing our learning and informing it from other sources. Debbie Heaney (WWF-UK) played a key role in translating these tools into a practical usable format so that they could be presented back to WWF and enable our experience and ideas to be shared with others. Since the toolbox was originally produced it has been used extensively with partner organisations. The tools have been used both in the UK and internationally – for example with civil society organisations in West Africa, business networks, the education sector in the UK and local government organisations. We have found these tools useful over the years and are pleased to now be able to publish them to share our learning with a wider audience.

The tools in this toolbox can be used at any stage in a partnership. They do not set out a linear, prescriptive route. We have used them in a logical sequence when embarking on a new relationship; but equally have picked out individual tools to apply retrospectively to existing relationships. We believe that where all the organisations involved invest together in the initial development, the periodic review and the maintenance of the partnership, this will result in a more effective collaboration for the longer term and lead to greater impact.

The tools are practical, each with a clearly defined purpose, description and process. A series of questions act as a prompt for some of the issues that each individual tool can help to tackle.


Question to consider when setting up Partnerships

How do we develop a shared vision?

Does this partnership need to be legally binding?

What do we need to have in place to work together to grow and strengthen?





How will we all know when we have come to the end of the partnership?

What happens when we complete the original task?

How do we monitor the impact of the original partnership?

Organisational context tool

Purpose

The purpose of the Organisational Context Tool is to help organisations individually identify issues from across their organisation that could impact on the development and content of a partnership. The tool can be used to:

1. Enable staff to analyse their organisation to develop an understanding of how it works, and be able to explain this to others.
2. Identify risks to fulfilling a proposed partnership, including
 - a. potential capacity gaps
 - b. influences on other partnerships your organisation has or is intending to develop
 - c. potential lack of synergy in goals and objectives with potential partners
3. Identify strengths that your organisation brings to any proposed partnership.

This is a way of thinking to support (primarily) the Partnership Agreement and Baseline Tools, but will also underpin all subsequent discussions and management of the partnership.

Description

When working in partnership it is important to consider how the relationship fits /interacts with the ongoing work of each partner organisation and the capacity that is required of each party to make the relationship work. For WWF-UK the primary rationale for forming partnerships is to enhance the delivery of our goals. To do this, we consider not only what we are doing within our programme, but also how we organise ourselves (i.e. our systems and structures) and who we work with, how and why.

WWF-UK uses the model outlined in this tool to help us explore the context in which we operate. The model consists of three interlocking circles which represent how an organisation functions – i.e.

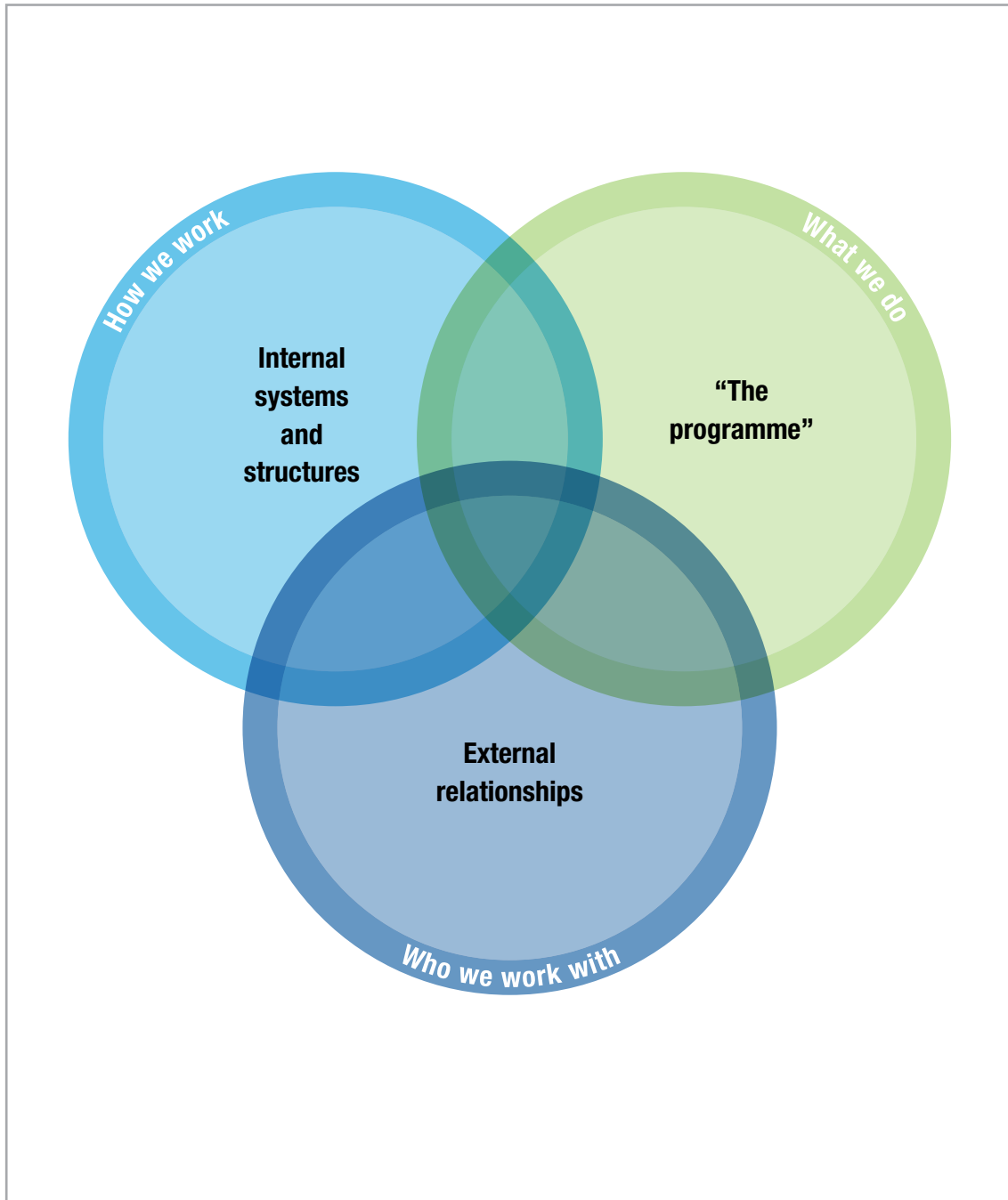
- What it does
- How its supporting systems and structures enable this
- Who it work with externally

Process

In this process individual organisations consider their own organisational context. When using this tool it is important to consider that the impacts of the partnership could extend across the organisation and therefore impact on other areas (as outlined in the model) needs to be considered. Participants in this process therefore need to have an understanding of cross-organisational issues.

1. Brainstorm each circle identifying key factors in relation to the desired purpose of the potential partnership.
2. Explore the linkages between the three circles identifying organisational issues that could impact on the partnership - strengths that you have to offer to a partnership, and potential risks (e.g. capacity gaps, impacts on other relationships that your organisation has)
3. Use the outputs from this thinking as a basis for the discussion of the development of a partnership using the other tools outlined in this toolbox.

Organisational context tool



Partnership agreement tool

Purpose

The purpose of the Partnership Agreement Tool is to help organisations prepare for and develop together the key elements of a negotiated partnership. The tool can be used to:

1. Enable the staff of an organisation prepare in advance for negotiations with another organisation with which they are considering entering into a partnership.
2. Provide an agenda for a joint discussion between organisations concerning the negotiation of a partnership agreement.
3. Provide possible headings for a written partnership agreement.

Description


Studies of partnership working suggest that relationships between organisations are less likely to encounter irreconcilable difficulties if the parties concerned establish a comprehensive agreement about how they intend to co-operate. The Partnership Agreement Tool provides an agenda for discussion concerning the development of a formal agreement between organisations.

Although it may be that not all headings are relevant in every case, the tool provides a useful checklist to ensure that even the more potentially sensitive areas of co-operation can be legitimately discussed. The tool can be used in conjunction with formal contractual headings that either party may also wish to address.


Process

1. Clarify the partnership under discussion.
2. Clarify the purpose of the exercise.
3. Use the Partnership Agreement Tool as a checklist for discussions (either internal or with the other organisation)

NOTE: Consideration should always be given to the legal status of a written agreement (even if it is not a formal contract). Legal instruction should be taken before making a final agreement.



How do I find out what other partners want out of the relationship?



Hmm...I could give
a copy of this to
our partner to work
through for their
own purposes!

Partnership agreement tool

1. Statement of intent

What is the vision for the joint work and for maintaining high standards of quality?

2. Parties involved

Who are the parties involved in the partnership? What can be done to reduce dependency on specific individuals?

3. Objectives of the partnership

What is the partnership supposed to achieve (for all parties)? Consider the potential contribution of the partnership to the organisation's strategic goals.

4. Values and principles

What are each organisation's values and principles? What are the non-negotiable expectations concerning values and principles?

5. Mutual trust and respect

Establish the principle of mutual trust and respect. What will be the agreed indicators of mutual trust and respect? What would be the indicators of a breakdown of trust and/or respect? What mechanism will be used to share concerns and to rectify problems? What will happen if there is an irretrievable breakdown of trust and respect?

6. Description of partnership

What type of partnership is being proposed? (See *Relationships Typologies Tool*, pp. 29-30, for suggestions.)

7. Transactions

What is being transacted in each direction between the organisations? For example: money, information, access, equipment, training, people.

8. Timescale

Over what period will the initial partnership agreement run? Is there a possibility of renewal? Is there a maximum period being considered for the partnership?

9. Obligations/responsibilities of each party

This should include issues of ownership, funds and any conditions attached to them (e.g. we will give x if you achieve y)

10. Roles

What roles and responsibilities does each party have in the partnership? How can agreed changes in roles be incorporated into the agreement? What rights and obligations does each party have?

11. Sharing information

Establish the principle of transparency concerning the sharing of information. What types of information would be covered by this? How and by whom should information be made available by each of the party(ies)? What are the consequences of failing to make agreed information available to the other party(ies)?

12. Confidentiality

What are the agreed expectations concerning the sharing of information? What information can each organisation withhold from the other? What information may be used externally by each party?

13. Decision-making

How and by whom will decisions be made between and within each organisation? How will transparency of relevant internal decision-making be ensured?

14. Sign-off procedure

Who will be the named persons in each organisation with the authority for approving action? What system will be in place in each organisation for 'signing off'?

15. Financial issues

If money is being transacted, what are the terms, conditions, accounting standards, accountability, etc?

16. Access

This may be to information, to third party contacts, to mailing lists to decision makers, etc.

17. Naming rights

What is the protocol concerning branding and mutual use of names and logos?

18. Reporting

What frameworks will be used for reporting? What will be done to ensure that reporting is a two-way process?

19. Monitoring progress

How will progress be measured? When will this happen and who will be involved/responsible? How will the development of the partnership itself be monitored? By whom?

20. Evaluation

Who will be responsible for evaluating the achievements and impact of the partnership? How will this happen and when?
What will be the indicators for success? Who will determine the indicators?

21. Exit strategy

What are the plans for exiting from the agreement? Under what conditions might the agreement be terminated prematurely?

22. Opportunities to develop and expand

How and by whom will decisions be made about developing the partnership?

23. Bringing into disrepute

What behaviour would constitute bringing the agreement or the other party(ies) into disrepute? What action can be taken if this happens?

24. Conflict resolution

What mechanisms will be used to resolve conflicts? What role could third parties play (if any)? Will third party judgements be binding?

25. Definitions of terms

A glossary of the terms used in the agreement. Clarification and agreement of terms can be an important part of the negotiation process and may avoid future problems.

Partnership baseline tool

Purpose

The purpose of the Partnership Baseline Tool is to provide a framework for developing a more systematic understanding of the nature of the partnership between organisations. It comprises a series of characteristics that can be used to describe, analyse and differentiate between different types of partnerships.

- The Partnership Baseline Tool can be used internally by an organisation to establish a baseline for understanding existing partnerships.
- It can also be used collaboratively by members of both organisations for the same purpose.

Description

Successful partnerships between organisations unlock, combine and leverage the creativity, insight, energy and resources of their participants. It is the quality of the dynamic interplay between a partnership's context, purpose, participants, organisation and outcomes that makes the difference between success and failure.

The success or failure of a partnership is not pre-determined simply by the context; the strengths and weaknesses of the participants or their similarities or differences, nor by the enormity or complexity of the shared task or even the resource constraints.


The success or failure is determined by how the challenges and opportunities are handled. This depends on the insight and leadership of the individuals involved and their ability to help navigate their respective organisations through complex and often unfamiliar terrain.

A partnership is fundamentally a process and not a thing. It is far more useful to conceive of partnerships as organic systems rather than mechanical constructions. From this perspective, understanding arises by looking at their dynamic rather than their static characteristics.

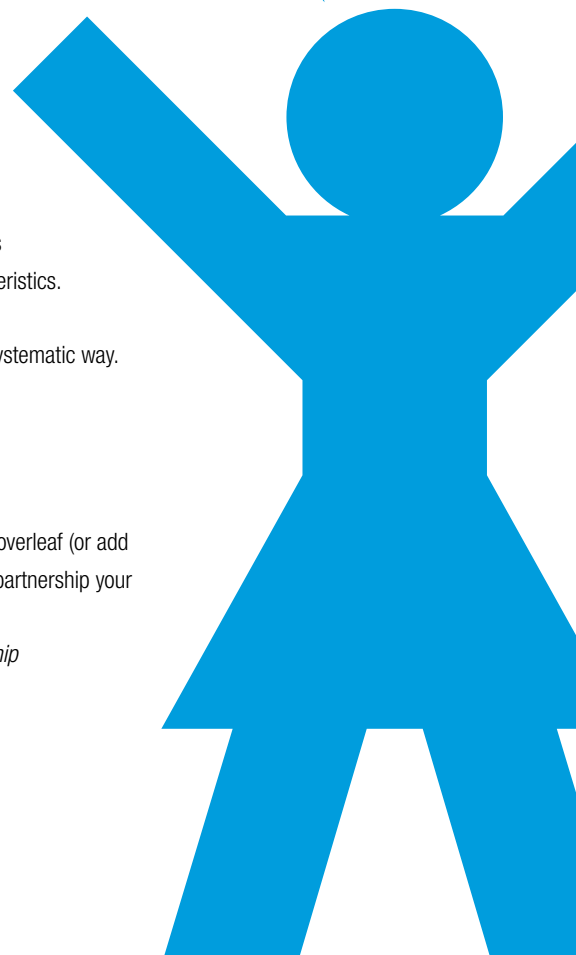
The Partnerships Baseline Tool provides a framework to examine these characteristics in a systematic way.

Process

1. Clarify the partnership under discussion.
2. Clarify the purpose of the exercise.
3. Use some or all of the 16 characteristics described in the Partnership Baseline Matrix overleaf (or add your own in the boxes provided) to establish an agreed baseline understanding of the partnership your organisation has with another organisation.
4. The baseline can be referred back to in order to measure progress using the *Partnership Monitoring Tool*, pp. 21-24.



We need to clarify why we need this partnership... But how?



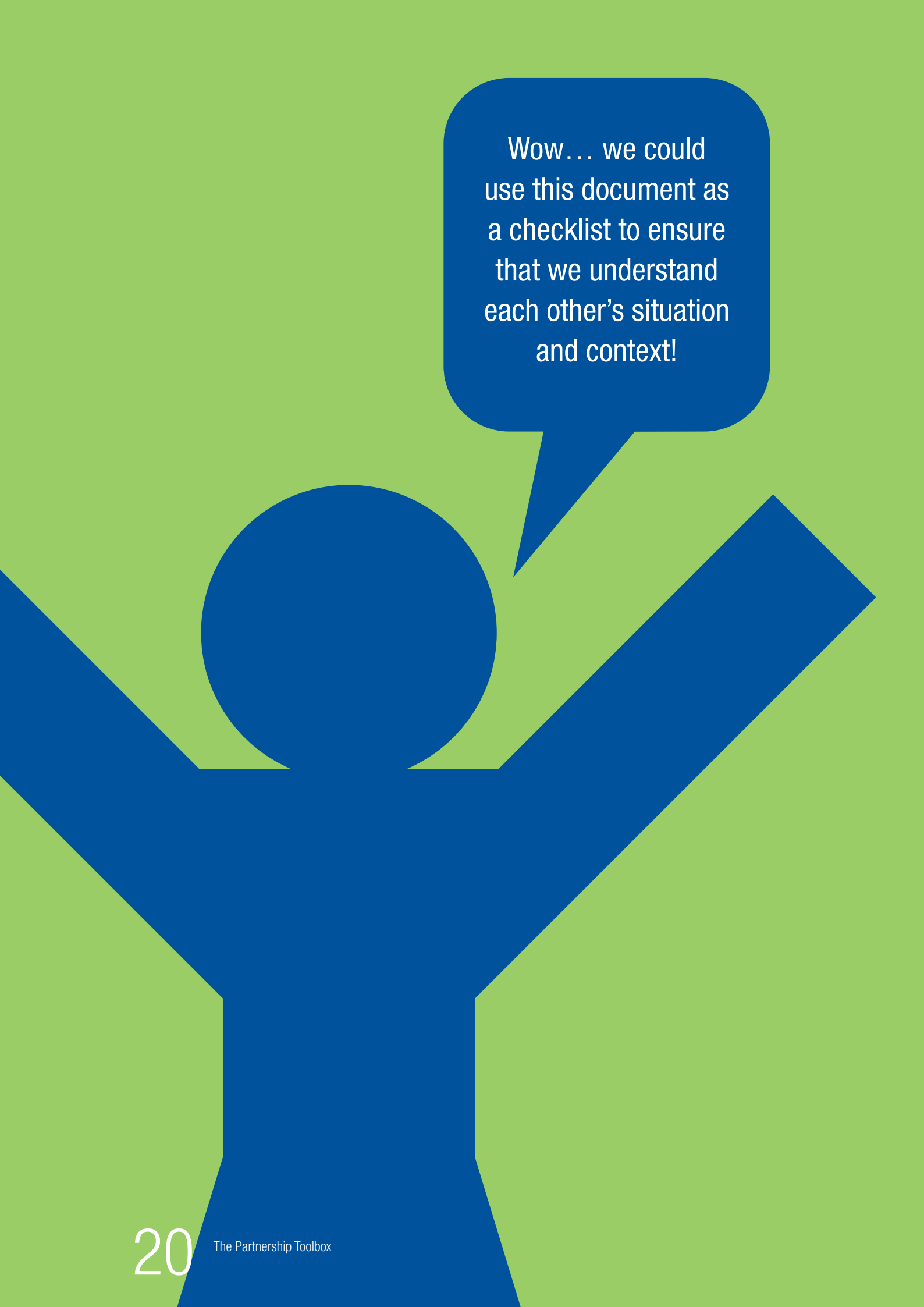
Partnership baseline matrix

1. Parties involved	Who are the participating organisations in the partnership and their sectors (private/business; public or civil society)?
2. When established	When the partnership was established together with some brief notes on its history.
3. Planned timescale	Partnerships may be time-bound or open-ended. Some partnerships may begin as time-bound and limited in ambition but evolve over time.
4. Drivers	Drivers create the conditions for the partnership to occur. They are part of the broader context for the partnership. For example, the decline in a particular species or habitat.
5. Triggers	Triggers are the specific conditions that stimulated the individuals and organisations together to address an issue or set of issues. For example, the introduction of a new EU directive.
6. Purpose (including scope and complexity)	<p>Apart from their individual goals and expectations, participants in a partnership must be able to establish a common agenda that addresses mutually agreed problems or challenges. The degree of difficulty and risk of failure will usually be greater, the greater the differences between participants' individual agendas and the common agenda. Even when participants join forces to promote what is a common goal from the outset, problems can arise if there is insufficient knowledge or understanding of individual expectations and agendas.</p> <p>The scope of the purpose refers to whether the intended action will be carried out locally, nationally, or internationally.</p> <p>The complexity of the purpose refers to whether the intended action is</p> <ul style="list-style-type: none"> • Situational – a specific, well-defined goal that is tangible and usually one-off. The situational level is more often at a local level and time-bounded. • Attitudinal – one step more complex. For example, raising the awareness of the business sector in dealing with disability in the workplace. • Institutional – attempting to change existing policies or legislation or to create new bodies for the long term to deal with the particular issues in question. • Values – attempting to bring about deeper level changes in people's beliefs and aspirations. It is normally the most difficult and lengthy type of action to undertake. <p>As the partnership develops so do individual and collective insights into what is possible and desirable. Early successes may lead to more ambitious aims being set. In other cases, ambitions may have to be scaled-down in the face of unexpected problems.</p>

<p>7. Transactions</p>	<p>What is being transacted in each direction between organisations? For example: money, information, access, equipment, training, people.</p>
<p>8. Form of Agreement</p>	<p>Partnerships may be established with minimal organisational and legal infrastructure, focusing on the pragmatic needs associated with addressing shared goals. Other partnerships may be more formalised through the development of a joint mission statement and objectives; memoranda of understanding, legal contracts or, in the case of joint legally constituted bodies, articles of association.</p> <p>Agreements between participants may include statements about:</p> <ul style="list-style-type: none"> • Rights and responsibilities • Decision-making mechanisms • Involvement of intended beneficiaries • Accountability • Conflict resolution <p>See the <i>Partnership Agreement Tool</i>, pp. 12-15, for further headings.</p>
<p>9. Focus</p>	<p>The relative emphasis within the partnership on the “What we do”, “How we work” and “Who we work with”</p>
<p>10. Developmental stage of the partnership</p>	<p>Partnerships between organisations can go through a number of stages. Common stages are:</p> <ul style="list-style-type: none"> • Identification and mutual ‘sounding out’ • Negotiation and formalisation • Maintenance • Development and strengthening • (Review and re-negotiation) • Phasing out / ending • (Possible re-generation)
<p>11. Characteristics</p>	<p>One way of gaining an overall sense of a partnership is to brainstorm a list of adjectives or phrases to describe it. For example: ‘frustrating, worthwhile, ground-breaking, strategic, valuable, frightening, respectful’.</p>
<p>12. Accountability - mutual rights and obligations</p>	<p>One way of establishing mutual accountability is to negotiate mutual rights and obligations between participants. When these are agreed they represent an important mechanism for ensuring mutual accountability.</p>

<p>13. Problems and challenges encountered</p>	<p>All partnerships will encounter problems and challenges. Establishing and maintaining a mutually beneficial partnership is rarely simple, especially with non-traditional allies. How these are negotiated and resolved provides an indication of the maturity and resilience of the partnership as well as the commitment each party has to the success of the partnership.</p> <p>Common challenges that may be encountered include:</p> <ul style="list-style-type: none"> • Bridging diversity – overcoming the differences that may occur when participating organisations have different cultures, characteristics, structures, methodologies, time-scales, expectations or languages. • Sustaining participant involvement – managing expectations is an important element of this. Most partnerships require more management time (for building trust, overcoming culture clashes, undertaking consultations etc.) and take longer to show results than expected at the outset. • Building new competencies – new skills, attitudes and capacities are needed by all participants in order to meet the aims of the partnership. • Addressing the power dimension – many partnerships have an inherent power imbalance. This may be due to some elements of the transaction being given inadequate recognition. Often, greater authority is given to (or assumed by) participants that bring the most financial resources to the partnership, despite the fact that money is only one of the elements of the transaction.
<p>14. Benefits for your own organisation</p>	<p>Potential benefits may include achieving organisational goals; development of 'human capital'; improved operational efficiency; organisational innovation; increased access to resources; better access to information; more effective services; enhanced reputation and credibility; legitimacy; enhanced reputation and credibility; access to communities; access to decision-makers.</p>
<p>15. Benefits for other organisation(s)</p>	<p>Potential benefits may include achieving organisational goals; development of 'human capital'; improved operational efficiency; organisational innovation; increased access to resources; better access to information; more effective services; enhanced reputation and credibility; legitimacy; enhanced reputation and credibility; access to communities; access to decision-makers.</p>
<p>16. Measurement and evaluation</p>	<p>Participants in a partnership need to work together to develop indicators for measuring the achievements and success of the partnership. The process of establishing a common approach to assessing performance can also help to grow mutual understanding, trust and shared work experience.</p>

Sources: Nelson, Jane and Simon Zadek (2000) *Partnership Alchemy*, Copenhagen, Denmark: The Copenhagen Centre
Fowler, Alan (2000) *Partnerships: Negotiating Relationships*, Occasional Papers Series No 32, Oxford: INTRAC.



Wow... we could use this document as a checklist to ensure that we understand each other's situation and context!

Partnership monitoring tool

Purpose

The purpose of this tool is to monitor progress in the development of the partnership between organisations.

The tool can be used in a number of different ways. For example, to:


1. Compare differences in perception between colleagues in one organisation concerning the partnership with the other organisation. This could be useful preparation for a review meeting with the other organisation.
2. Reach an agreement between organisations about the most important criteria for measuring the strength of the partnership.
3. Compare differences in perception between organisations concerning their partnership. This could be done as part of a progress review.
4. Examine how the partnership has changed over time. Again, this could be done as part of a progress review.
5. Compare differences between the existing nature of the partnership and the desired partnership. This might involve discussing problem areas and working out plans for improving the partnership between the organisations.

NOTE: Care should be taken when using this tool with representatives from other organisations as issues of a sensitive nature may be identified during the process.

Description

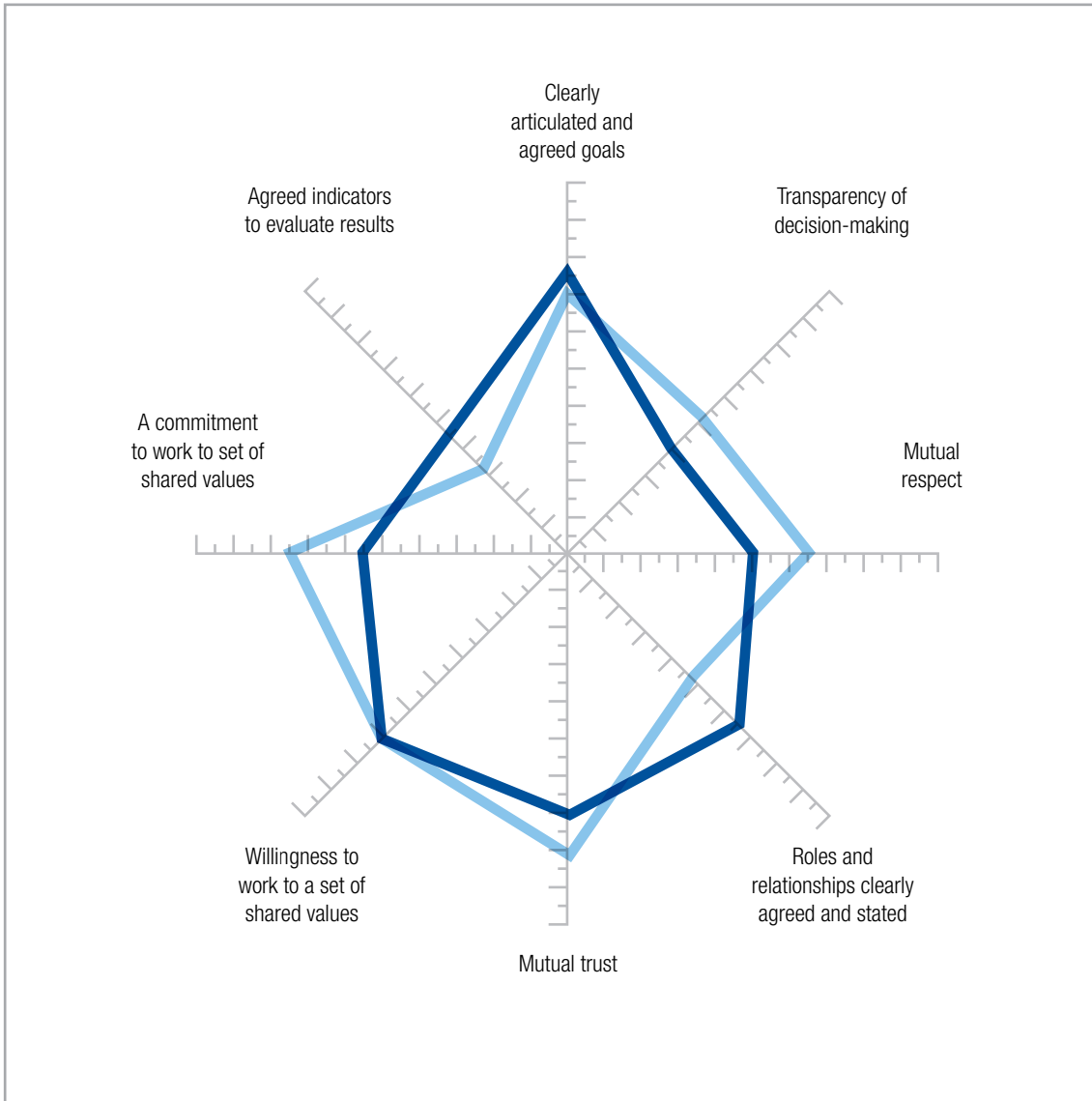
The tool involves examining the partnership between organisations using eight criteria. The degree to which the partnership meets these criteria is plotted using a 'spider diagram' with eight axes. The diagram gives a very visual representation of the 'shape of the partnership' and allows for easy comparisons between different perceptions (see example below where two perceptions of the same partnership are represented by a solid line and a dotted line).

Whilst the tool can be used by an individual, it is best used as a group exercise.



How do we measure whether we are making progress in this partnership?





Process

The process comprises two stages:

- Select the criteria for assessing the partnership.
- Examine the partnership using the agreed criteria.

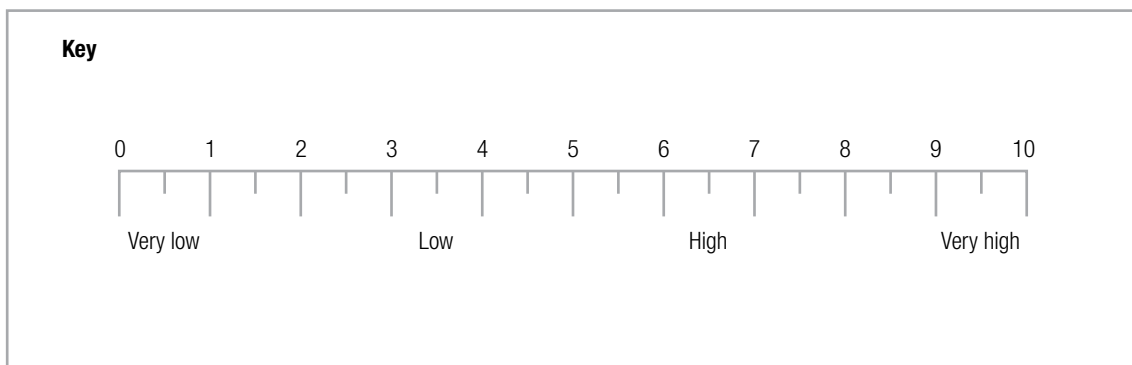
Selecting the criteria

1. Clarify the partnership under discussion.
2. Clarify the purpose of the exercise.
3. Consider possible criteria for assessing the partnership using the '*Characteristics of Partnerships Tool*, pp. 26-28. Write each on a separate card. Additional criteria may be added to the list by brainstorming or discussion. Each additional criterion is numbered and written on a separate card.
4. Discuss and agree a common understanding of the criteria.
5. Stick the cards on a wall or board so that they can be easily seen.

6. In a group setting, each person is given eight 'votes' (small self-adhesive coloured stickers work well). Each person is asked to place their eight 'votes' on the eight cards that they consider to be the most important criteria for assessing the partnership.
7. Count the total 'votes' for each card. The eight cards receiving the most votes represent a consensus on the most important criteria for assessing the partnership.

Examining the partnership

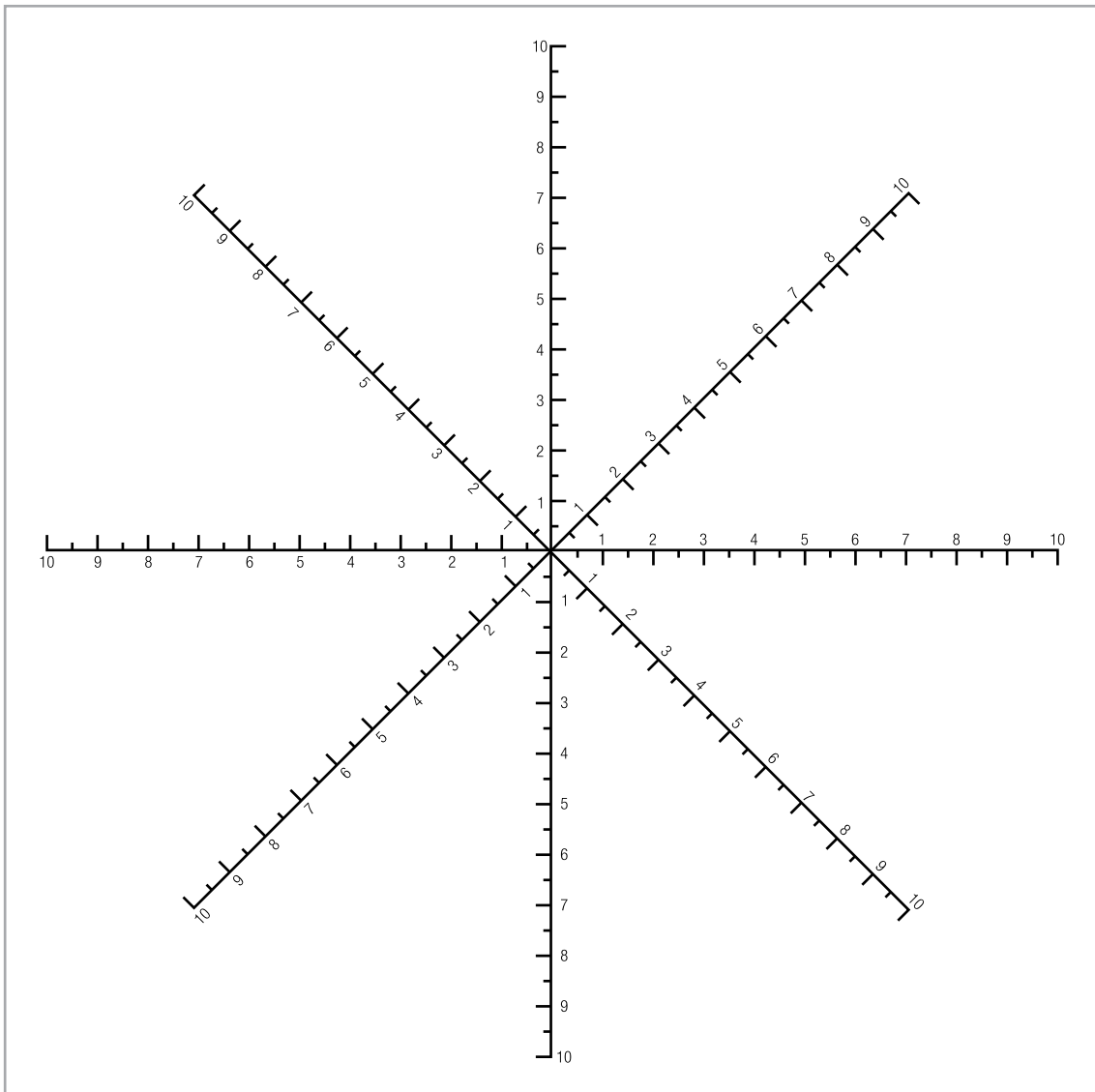
8. Place the eight agreed cards on the end of the 'legs' of a large scale version of the spider diagram. (Alternatively, each person can be given an A4 version of the spider diagram photocopied onto an overhead transparency and asked to complete this.)
9. Decide to what extent the partnership currently meets each of the eight selected criteria. Individuals should complete their own personal handout copy of the spider diagram using the following 'key' for guidance.



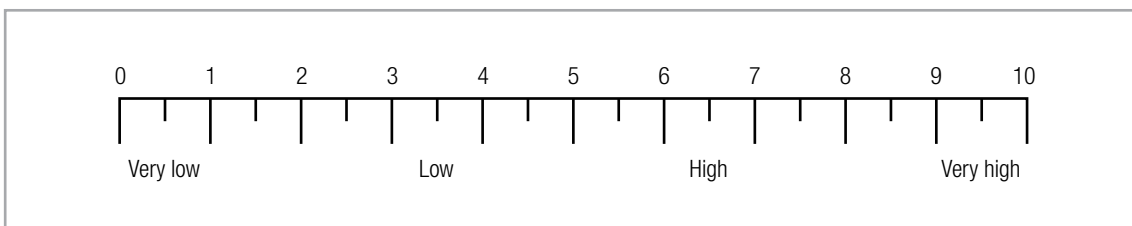
10. Each person is then asked to plot their assessment on the large-scale diagram by marking their scores on each axis and joining the dots. If possible, each person should use a different coloured pen. (Alternatively, individuals can be asked to plot their scores on a prepared overhead transparency. Comparisons can then be made by overlaying the transparencies).
11. The diagram can then be used to open up a discussion about the partnership: making comparisons; exploring the differences in scores and what these differences represent; identifying issues or problem areas that need to be addressed and generating ideas for strengthening the partnership.
10. Each person is then asked to plot their assessment on the large-scale diagram by marking their scores on each axis and joining the dots. If possible, each person should use a different coloured pen. (Alternatively, individuals can be asked to plot their scores on a prepared overhead transparency. Comparisons can then be made by overlaying the transparencies).
11. The diagram can then be used to open up a discussion about the partnership: making comparisons; exploring the differences in scores and what these differences represent; identifying issues or problem areas that need to be addressed and generating ideas for strengthening the partnership.

This will really tell us if we are making progress!

Partnership monitoring spider diagram



Key





How do we describe this partnership?

Characteristics of partnerships tool

This tool can be used in conjunction with the *Partnership Monitoring Tool*, pp. 21-24.

This tool provides criteria that can be used to help describe the nature of a partnership, and as with the other Tools in this Toolbox, could be used as an agenda for a joint discussion between organisations. Alternatively it could be used by an organisation as advance preparation for negotiations with another organisation with which they are considering entering into a partnership.

1.	<p>A commitment to work to a set of shared values</p> <p>Values are the beliefs, standards or traditions that define an individual or group, and which stand firm in all circumstances, particularly in adversity. An important principle for partnership is that the parties have shared or, at least, congruent values. The more congruent the values between the parties, the better the basis for mutual respect and confidence in the relationship.</p>
2.	<p>Voluntarily entered into</p> <p>A partnership should always be voluntary and free from coercion. In reality, many partners may feel that they have little choice but to enter a wider agreement in order to secure funding.</p>
3.	<p>Mutual trust</p> <p>Trust can be said to exist if a person is willing, in the course of doing something, to expose himself/herself to the risk of opportunistic action by another. Trusting a person means believing that when offered the chance he/she is not likely to behave in a way which is damaging to us.</p> <p>We may trust another because of:</p> <ul style="list-style-type: none"> • Our experience of past transactions (process-based trust). • Our potential partner's characteristics (ascribed trust). • Institutions, such as codes of conduct, that regulate practices (institutional-based trust). <p>The development of trust can be a long-term process. Many would argue that trust must be earned.</p>
4.	<p>Mutual respect</p> <p>Recognition that the contributions each party makes to the relationship may be different but will be given equal acknowledgement and recognition.</p>
5.	<p>Roles and responsibilities clearly agreed</p> <p>Clarity about roles and responsibilities is very important. A checklist of headings produced by discussion between partners can be very helpful. Agreements may be verbal or written but written agreements are likely to be easier to monitor and evaluate and can more easily contribute to each organisation's 'institutional memory'.</p>

6.	<p>Rights and obligations agreed</p> <p>One way of addressing the issues of mutuality and balance is to negotiate the rights and obligations each party has within the relationship. The importance of a rights and obligations approach is that it makes relational issues transparent, and hence discussible (see separate handout).</p>
7.	<p>Equitable distribution of costs and benefits</p> <p>The costs and benefits of the relationship are shared on an equitable basis. The relationship strives for a balance of the benefits valued by each partner and the costs (not just economic costs) that each is willing to bear.</p>
8.	<p>Clearly articulated and agreed goals</p> <p>The purpose and goals of each party are articulated, negotiated and agreed.</p>
9.	<p>Transparency with regard to financial matters</p> <p>Both partners are open about how the funding for the partnership is accessed (including transparency about donor conditions), transacted and used.</p>
10.	<p>Reciprocal accountability</p> <p>A recognition that each partner is accountable to the other for the success of the partnership (i.e. accountability is not simply one-way based on funding) and that both partners are jointly responsible for achieving the agreed goals.</p>
11.	<p>Transparency of decision-making</p> <p>Each partner is open about how it makes decisions concerning the partnership. Notes of internal meetings may be shared or partners may have a right to attend key meetings of the other party when the partnership is discussed.</p> <p>Mechanisms or structures for joint decision-making may need to be established together with clarity for what decisions are joint ones and which are sovereign to each of the partners.</p>
12.	<p>Joint responsibility for achieving goals</p> <p>The overall achievement of agreed goals is seen as a responsibility of the partnership that cannot be delegated to the individual partners. Partners are mutually accountable for the contributions they have agreed to make.</p>
13.	<p>Commitment to mutual capacity building</p> <p>Building the capacity of the partnership should be seen as a reciprocal activity.</p>
14.	<p>Recognition of other partnerships</p> <p>Each partner is likely to be involved in a range of existing relationships with other parties. These should be shared (transparency) and acknowledged (and certainly not jeopardised) in any new partnership.</p>
15.	<p>Relationship as well as achievement of mutually agreed goals regularly reviewed</p> <p>The process of monitoring and reviewing should focus not only on the achievement of agreed goals but also on the healthy functioning of the relationship itself.</p>

<p>16.</p>	<p>Willingness to learn from and respond to the outcomes of reviews</p> <p>The review process should be embraced as an opportunity for learning and modifying approaches. All partners need to be committed to consider making necessary changes for the benefit of the partnership providing these do not compromise their values and identity or conflict with commitments made to other partners.</p>
<p>17.</p>	<p>A process for adjudicating disputes</p> <p>Even with the most thoroughly and systematically negotiated agreement, the relationship between the partners can run up against unanticipated problems. It is important to recognise that this can happen and to build in a mechanism for frank and open discussion which may lead to the re negotiation of some aspects of the partnership. A third party may be necessary in some circumstances.</p>
<p>18.</p>	<p>Agreed indicators used to evaluate results</p> <p>Partners should jointly agree indicators that will be used to evaluate the effect of the partnership and the achievement of agreed goals.</p>
<p>19.</p>	<p>Ability and willingness to learn from and act on the outcome of evaluation</p> <p>A commitment to learn from and act on the outcome of evaluation is important (both within the context of the partnership being evaluated if this is on-going and in other partnerships).</p>

If I think I'm working in partnership, and you think you are working under contract, how do we find a common language?



Relationships typologies tool

This tool can be used in conjunction with the *Partnership Agreement Tool*, pp. 12-13.

A number of writers on NGOs and organisational relationships have established typologies of relationships based on a number of defining characteristics. Each takes a slightly different starting point but all contribute some interesting insights into the nature of how organisations work with each other.

The writer on NGOs, Alan Fowler¹, identifies five common types of relationships between organisations. Each is characterised by an increasing potential for mutual influence and depth of rights and obligations.

Development ally	In this relationship, two or more organisations agree to co-operate on a mutually agreed agenda, typically for an agreed period of time. They may do this by exchanging information, sharing expertise, or using their respective reputations and contacts in co-ordinated ways. Whilst modest financial transfers may occur, money is not the basis of the relationship.
Project funder	This relationship is narrow and focused. It revolves around discrete projects and agreements may be very tightly specified because a major focus is on a financial transaction.
Programme supporter	Concentrates on a particular area of work of mutual concern. The focus is often understood in terms of sectors, such as health or education; or a theme such as conflict prevention or human rights. Support could be financial inputs, technical expertise, facilitating access to specialist networks and so on. A programme may correspond to (one of) each organisation's strategic goals.
Institutional supporter	Primarily concerned with overall [organisational] effectiveness and viability. Transactions benefit from both what the participant organisations are and what they do. Money as well as information is likely to be transacted but with limited conditionality. Organisational issues that are not directly concerned with the purpose of the organisation – such as governance and leadership selection – are seldom considered appropriate relational terrain and are unlikely to be included in agreements.
Partner	A relationship that exhibits full mutual support for the identity and all aspects of the work and the well-being of each organisation. It is holistic and comprehensive with no limits – in principle – as to what the relationship would embrace.

1. Fowler, Alan (2000) *Partnerships: Negotiating Relationships*, Occasional Papers Series No 32, Oxford: INTRAC

The Institute of Development Research, Boston developed a typology of models of International NGO (INGO) and local NGO collaboration. It defines the different relationship types on the basis of shared governance. This is the extent to which decision-making authority, both formal and informal, is shared between the organisations.

Contracting	An INGO pays an independent NGO to provide a well-defined package of services under conditions largely established by the INGO.
Dependent franchise	A formally independent NGO functions as a field office of an INGO which undertakes most, if not all, of its direction and functioning.
Spin-off NGO	A dependent franchise or INGO field office is expected over time to become organisationally and financially independent of the INGO.
Visionary patronage	An INGO and NGO with a shared vision of development jointly agree measures of outcomes and reporting requirements for a programme which the NGO implements and the INGO supports with funds and other resources.
Collaborative operations	The INGO and NGO share decision-making power over planning and implementation by the NGO with funding and technical support from the INGO.
Mutual governance	The INGO and the NGO each have decision-making power, or at least substantial influence, over each other's policies and practices at both the organisational and programme level.

Fowler also identifies three levels of collaboration:

Networks	These are the loosest form of collaboration as members may be quite dissimilar, the primary function is information sharing.
Alliances	These take collaboration a stage further providing greater benefits because participants synchronise their efforts and resources. Alliances tend to be functional and are increasing as NGOs actively seek to complement rather than compete with or duplicate the activities of others.
Coalitions and consortia	These terms cover organisational entities that are 'constituted by and (are) the legal responsibility of the founding NGOs but (do) not have authority over them.' Coalitions tend to provide increased profile and leverage. Consortia provide increased access to, and application of resources. Coalitions usually require considerable investment of time and human resources from members but can result in greater strength when voicing shared positions.

This is great information to use with the Partnership Agreement and Partnership Baseline Tools!

2. Quoted in Penrose, Angela (2000) Partnership, in Robinson, Dorcas, Tom Hewitt and John Harriss (Eds.) (2000) *Managing Development: Understanding Inter-Organizational Relationships*, Milton Keynes, England: Open University Press & Sage Publications.



Appendix – resources on partnerships

Purpose

This Appendix provides details of a few of the resources that have been produced on partnership that we have found useful.

Borrini-Feyerabend, G., Farvar, M.T., Nguingiri, J.C. and Ndangang, V.A. (2000) *Co-Management of Natural Resources: Organising, Negotiating and Learning-by-Doing*. Heidelberg: GTZ and IUCN, Kasperek Verlag.

Fowler, A. (2000) *Partnership: Negotiating Relationships – A Resource for Non Governmental Organisations*, Occasional Paper Series No.32, Oxford: INTRAC.

Heap, S. (1998) *NGOs and the Private Sector. Potential for Partnerships?* Oxford: INTRAC.

James, R. (1994) *Strengthening the Capacity of Southern NGO Partners*. Oxford: INTRAC.

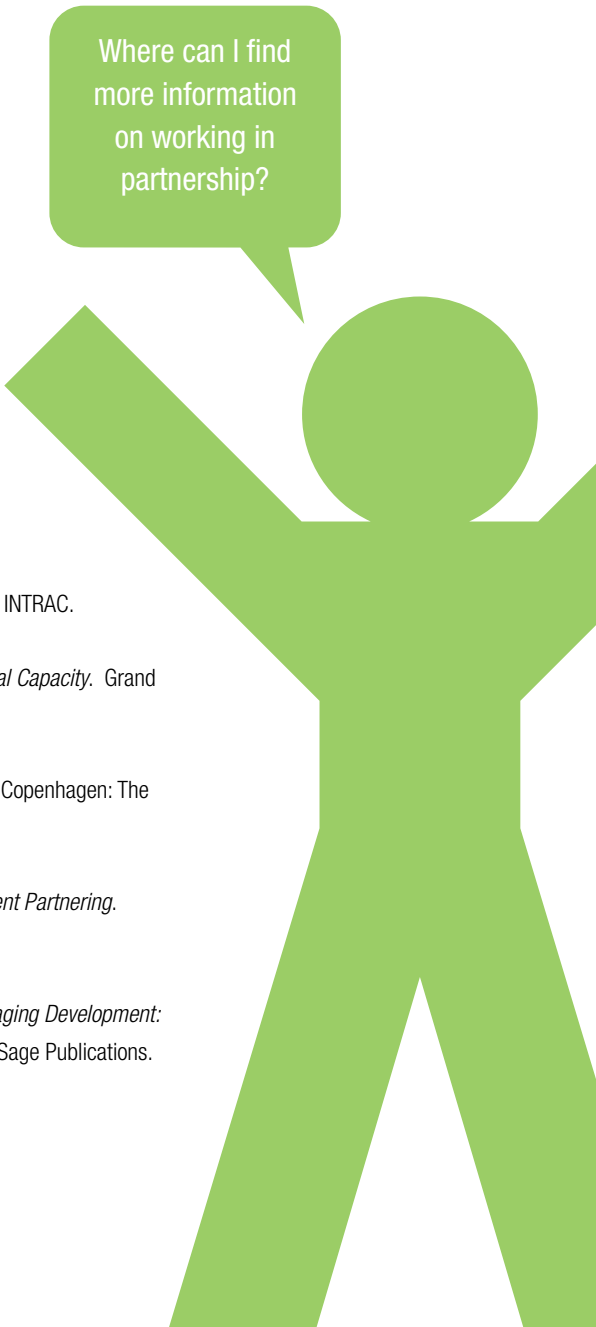
James, R. (2001) *Power and Partnership? Experiences of NGO Capacity Building*. Oxford: INTRAC.

Johnson, S. and Ludema, J.D. (eds.) (1997) *Partnering to Build and Measure Organizational Capacity*. Grand Rapids: Christian Reformed World Relief Committee.

Nelson, J. and Zadek, S. (2000) *Partnership Alchemy: New Social Partnerships in Europe*. Copenhagen: The Copenhagen Centre.

NPI Learning Team (1997), *New Partnerships Initiative: A Strategic Approach to Development Partnering*. Washington: USAID. <http://www.usaid.gov/pubs/npi/index.html>

Penrose, A. (2000) Partnership IN Robinson, D., Hewitt, T. and Hariss, J. (eds) (2000) *Managing Development: Understanding Inter-Organisational Relationships*, Milton Keynes: Open University Press & Sage Publications.



Where can I find more information on working in partnership?



The mission of WWF is to stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by

- conserving the world's biological diversity
- ensuring that the use of renewable natural resources is sustainable
- reducing pollution and wasteful consumption

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