# Part 1: Prospective Partnership Assessment

Partnerships should not be entered lightly. They are an important commitment with the potential to bring in significant value but they are not without risks and often suffer high transaction costs. This section of the tool is used to help organisations assess the value, risks and implications of a partnership in order that they can confidently go ahead, know that more information is required or decide not
to proceed.

### Partnership Assessment is in two sections:

Section 1 is a high-level checklist designed to give you an ‘at a glance overview’ of the key considerations and your assessment of them. This can either be completed with information from Section 2 (Partnership information and a more in-depth checklist) or as a stand-alone prompt for discussion when considering the prospective partnership.

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| **Final decision** (to be completed after completing this form) |
|  Decline | Continue to investigate | Go ahead |
| **Completed by:** |
| **Name & role:** |
| **Date:** |
| Step 1: **High level checklist** |
| Decline | Continue to investigate | Go ahead | More information needed |
| **CONSIDERATION** | **INFORMATION** | **ASSESSMENT** |
| Clear imperative for a partnership approach |  |  |  |  |  |
| The partner(s) is / are acceptable (see part 2 below) |  |  |  |  |  |
| Partnership is strategic and fits with organisational mandate |  |  |  |  |  |
| Partnership provides significant value / impact |  |  |  |  |  |
| Costs acceptable in relation to value gained |  |  |  |  |  |
| Risks are sufficiently low or well mitigated |  |  |  |  |  |
| Sufficient financial resources to implement |  |  |  |  |  |
| Sufficient internal resources / capacities available |  |  |  |  |  |
| Implications are acceptable |  |  |  |  |  |
| Sufficient buy-in from relevant board / staff / divisions / country offices |  |  |  |  |  |
| Step 2: **Partnership information** |
| **PARTNERSHIP OVERVIEW** |
| Context |  |  |  |  |  |
| Summary vision, mission & objectives |  |  |  |  |  |
| Reasons for partnering to achieve objectives |  |  |  |  |  |
| Non-partnership alternative approach (if applicable) |  |  |  |  |  |
| What do we bring to the partnership? |  |  |  |  |  |
| What does/do the partner(s) bring to the partnership? |  |  |  |  |  |
| **CHECKLIST** |
| Decline | Continue to investigate | Go ahead | More information needed |
| **CONSIDERATION** | **INFORMATION** | **ASSESSMENT** |
| How does the partnership fit with our organisational mandate? |  |  |  |  |  |
| How does the partnership fit with our organisational strategy? |  |  |  |  |  |
| How does the partnership fit with current programmes / obligations / other partnerships? |  |  |  |  |  |
| **EXPECTED BENEFITS / VALUE(see Tool 2: Assessing the added value of partnerships)** |
| What is the contribution to our mission / impact for ultimate target groups (including clear measures of success)? |  |  |  |  |  |
| What are the expected benefits to our organisation? |  |  |  |  |  |
| **COSTS TO OUR ORGANISATION** |
| Staff time (full economic cost) |  |  |  |  |  |
| Consultants |  |  |  |  |  |
| Travel / venue / other costs |  |  |  |  |  |
| **RISKS** |
| Going beyond mandate; loss of programmatic focus |  |  |  |  |  |
| Duplication of efforts |  |  |  |  |  |
| Overlong time investment |  |  |  |  |  |
| Financial implications |  |  |  |  |  |
| Lack of sufficient capacity to deliver |  |  |  |  |  |
| Interference with natural systems / distorting the market |  |  |  |  |  |
| Compromise neutrality or independence / reputational issues |  |  |  |  |  |
| Loss of autonomy on key issues |  |  |  |  |  |
| Risk to existing relationships |  |  |  |  |  |
| **IMPLICATIONS** |
| What precedent (if any) does it set? |  |  |  |  |  |
| What obligations / commitments are being made – is there a plan in place for the end of the partnership? (See Tool 7 – Transitioning) |  |  |  |  |  |
| Accountability concerns |  |  |  |  |  |
| **PRACTICALITY** |
| Are funding sources available for implementation? |  |  |  |  |  |
| Is there Internal buy-in from relevant management / staff / offices? |  |  |  |  |  |
| Are there sufficient internal resources that can be committed? |  |  |  |  |  |
| Are there sufficient internal skills and competencies to deliver? |  |  |  |  |  |

# Part 2: Individual Partner Assessment

**This section of the toolkit is used to help in assessing the value, risks and implications of working with a specific partner in order that you can confidently go ahead, decide not to proceed or gather more information before reaching a decision.**

Taking time to understand what a prospective partner will bring to a partnership will help in assessing the benefits and risks involved in the partnership. It will also help to define what resources our organisation contributes and how the partners are likely to work together in the most productive way. This tool can be updated and adjusted as additional details become available, to assist in managing and documenting the partnership.

**Note:** This can be copied and completed for as many prospective partners as required.

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| **Final decision** (to be completed after completing this form) |
|  Decline | Continue to investigate | Go ahead |
| **Completed by:** |
| **Name & role:** |
| **Date:** |
| Step 2: **Partner assessment** |
| **FACTUAL INFORMATION** |
| Partner information |  |  |  |  |  |
| Name and type of organisation (government, private sector, UN, national or international NGO, civil society, academia, International Financial Institution) |  |  |  |  |  |
| Location |  |  |  |  |  |
| Name, email & telephone number of focal point for the organisation |  |  |  |  |  |
| Partner activities |  |  |  |  |  |
| Prior experience of working with this partner (if any, note if past partnership was satisfactory) |  |  |  |  |  |
| **CHECKLIST** |
| Decline | Continue to investigate | Go ahead | More information needed |
| **CONSIDERATION** | **NARRATIVE (for each section, provide concrete examples, highlight issues and state whether further information is required)** | **ASSESSMENT** |
| Alignment of corporate values with our organisation’s objectives and priorities |  |  |  |  |  |
| Alignment with our partnering principles |  |  |  |  |  |
| Recognised strengths from prior partnership experience (provide specific examples) |  |  |  |  |  |
| **Overall assessment of compatibility** |  |  |  |  |  |
| **ADDED VALUE** |
| Resource partners: financial and in-kind (human and technical) resource contribution |  |  |  |  |  |
| Knowledge partners: Enhanced capacity through information, evaluation and analysis |  |  |  |  |  |
| Policy and governance partners: Enhanced capacity through policy and governance support at country/regional level |  |  |  |  |  |
| Advocacy partners: Enhanced outreach and impact through support for advocacy work |  |  |  |  |  |
| Capability partners: Support through design and implementation of programmes and operations |  |  |  |  |  |
| **Overall assessment of additional resources** |  |  |  |  |  |
| **COSTS TO OUR ORGANISATION** |
| Direct costs (value of our organisation’s contribution) |  |  |  |  |  |
| Indirect costs (transaction costs, staff time, etc.) |  |  |  |  |  |
| Training / support from our organisation needed to build partner’s capacity |  |  |  |  |  |
| **Overall assessment of costs to our organisation** |  |  |  |  |  |
| **RISKS** |
| **Note: Refer to existing organisational due diligence processes to assess risk as well as this checklist** |
| Has a due diligence process been completed (if applicable)? |  |  |  |  |  |
| Conflict of interest? |  |  |  |  |  |
| Risk of negative impact on other existing relationships? |  |  |  |  |  |
| Reputational risk to our organization? |  |  |  |  |  |
| Issues of IP or confidentiality? |  |  |  |  |  |
| Appropriate sanctions lists checked? |  |  |  |  |  |
| Weak management structure and systems? |  |  |  |  |  |
| Inadequate staffing levels? |  |  |  |  |  |
| Lack of appropriate staff skills? |  |  |  |  |  |
| **Overall assessment of risk** |  |  |  |  |  |