

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.

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		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The partner(s) is / are acceptable (see part 2 below)		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partnership is strategic and fits with organisational mandate		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Partnership provides significant value / impact		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Costs acceptable in relation to value gained		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Risks are sufficiently low or well mitigated		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sufficient financial resources to implement		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sufficient internal resources / capacities available		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implications are acceptable		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sufficient buy-in from relevant board / staff / divisions / country offices		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Step 2: Partnership information

PARTNERSHIP OVERVIEW

Context		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Summary vision, mission & objectives		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reasons for partnering to achieve objectives		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-partnership alternative approach (if applicable)		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What do we bring to the partnership?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What does/do the partner(s) bring to the partnership?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CHECKLIST					
Decline Continue to investigate Go ahead More information needed					
CONSIDERATION	INFORMATION	ASSESSMENT			
How does the partnership fit with our organisational mandate?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How does the partnership fit with our organisational strategy?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How does the partnership fit with current programmes / obligations / other partnerships?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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)?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What are the expected benefits to our organisation?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
COSTS TO OUR ORGANISATION					
Staff time (full economic cost)		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consultants		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Travel / venue / other costs		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RISKS					
Going beyond mandate; loss of programmatic focus		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Duplication of efforts		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overlong time investment		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial implications		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of sufficient capacity to deliver		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interference with natural systems / distorting the market		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Compromise neutrality or independence / reputational issues		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loss of autonomy on key issues		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Risk to existing relationships		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IMPLICATIONS					
What precedent (if any) does it set?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What obligations / commitments are being made – is there a plan in place for the end of the partnership? (See Tool 7 – Transitioning)		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accountability concerns		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PRACTICALITY					
Are funding sources available for implementation?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is there Internal buy-in from relevant management / staff / offices?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are there sufficient internal resources that can be committed?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are there sufficient internal skills and competencies to deliver?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.

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		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Name and type of organisation (government, private sector, UN, national or international NGO, civil society, academia, International Financial Institution)		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

COLLABORATION AMONGST CIVIL SOCIETY ORGANISATIONS
A TOOLKIT FOR STRENGTHENING PARTNERSHIPS

Location		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Name, email & telephone number of focal point for the organisation		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partner activities		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prior experience of working with this partner (if any, note if past partnership was satisfactory)		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alignment with our partnering principles		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recognised strengths from prior partnership experience (provide specific examples)		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall assessment of compatibility		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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)?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflict of interest?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Risk of negative impact on other existing relationships?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reputational risk to our organization?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Issues of IP or confidentiality?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appropriate sanctions lists checked?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weak management structure and systems?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inadequate staffing levels?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of appropriate staff skills?		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall assessment of risk		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>