

Partnership checklist: issues to consider when developing a joint project¹

It is important to manage organisational relationships effectively, whether the relationship is long term or short term, a 'true' partnership² or an alliance, formed across sectors or comprising organisations from the same sector. Despite the operational challenges, it is particularly important to maintain good practice in establishing and managing relationships in crisis affected scenarios; stronger relationships are more effective, more likely to have an impact on the ground, and are also better able to withstand crises.

Why, when and how to use this checklist

The way in which organisations work together is important but is often overlooked as the focus is on project design and delivery, particularly in emergency situations. However, by considering these issues at an early stage many of the challenges to joint working can be avoided or overcome more easily, and project delivery will be more effective. The focus of this checklist is thus on the issues and processes related to joint working rather than on wider project issues and processes.

This checklist is intended to be used at the beginning of a joint project or response to ensure that essential issues around working in partnership are considered. It should be of use to any organisation that works, or is planning to work, with other organisations, in both emergency and non-emergency situations. It can also be used as a reminder of key issues to consider when preparing a Memorandum of Understanding (MoU) or similar agreement, or when the relationship is reviewed.

The checklist is structured around key stages in the lifecycle of organisational relationships, but all points should be considered when first establishing a joint initiative or when organisations that already work together develop a new project. Full guidance is available³ but, especially where time is limited, this checklist is a reminder of important issues to consider. Common sense is required to judge the time needed to consider each issue, depending on the individuals and organisations concerned and the situation in which they are working.

Identifying

- Is the decision to work with this/these organisation(s) based on adequate knowledge and consideration of all potential collaborators? *For example, what other organisations work in the area/sector, why is this the most appropriate organisation to work with at this time and on this project?*
- Is the project within the mandate of all organisations? If not, is the rationale for engagement sufficiently justifiable? *For example, there may be strategic or ethical reasons for an organisation to work on an issue not directly within its mandate.*
- Do potential partners have the necessary skills, or the means to build or access them (for example, by contracting in expertise for example), and a good reputation or track record?
- Have the benefits and costs of working jointly been fully considered? *For example, benefits include the capacity to deliver on a larger scale and securing or developing additional skills or resources, and costs may include more extensive consultation and decision making processes.*
- Are there any risks in working in partnership with this/these organisation(s)? *For example, loss of autonomy or reputation, shift in focus of either organisation.*

Building

- Do all partners share a good understanding of the context and issues being addressed, and appreciate the mandate and values of other organisations within the partnership? *This is particularly important where organisations are working with those from other sectors.*
- Are the aim and objectives of the partnership defined and agreed?
- Has an implementation plan been agreed?
- Have partners identified and found ways to mobilise the resources needed?

¹ This checklist was developed by Fauna & Flora International (FFI) during the USAID funded project *Life on the Edge - conserving biodiversity and rebuilding livelihoods in the wake of natural disaster and human conflict*. This project has enabled FFI to review experiences of working collaboratively within and outside of the conservation sector, focusing on five sites around the world where natural disasters or human conflict have threatened biodiversity and livelihoods.

² Organisational relationships vary widely in shape and scope and although not all of these relationships will be 'true' partnerships - characterised by principles such as equity, transparency and mutual benefit - the term 'partnership' is widely used and is used here for ease of reference.

³ Available at www.fauna-flora.org and www.rapid-response.org, these include: *Guidance for working with other organisations*, which draws on a number of publically available guidelines and toolkits and includes guidance and tools for working in partnership, and; a paper produced for the *Life on the Edge* project, including recommendations for working across sectors in post-disaster and conflict situations.

- Are the roles and responsibilities of each organisation clearly defined and agreed? *This could include, for example: employment and/or management of staff; financial management and reporting; project management and reporting; day to day administrative tasks. This list is not exhaustive; other issues may also be relevant depending on the organisations and the project on which they are working.*
- Are the expectations of each organisation clear and realistic?
- Does each partner have the necessary skills and resources to enable them to fulfil their roles and responsibilities effectively? If not, have strategies been developed to address these skills and resource gaps?
- Have time and resources been budgeted for partnership management? *This includes, for example, regular meetings and communication.*
- Has the partnership agreed how to present itself (for example, individually, as collaborating organisations, or as a partnership) to various stakeholders (community members, local government institutions, donors, NGOs etc) that have an interest in the work?
- Has a MoU or other relevant form of agreement been prepared, and signed by all partners?

Managing and maintaining

- Is the structure and processes of the partnership appropriate? *For example, is the decision making process timely, equitable and transparent? Is the management structure appropriate? Is there a process for resolving conflicts?*
- Do the partners communicate at appropriate times (not too little and not too often) and in appropriate ways (face to face meetings, telephone, email)?
- Are meetings managed well (focused, appropriate and interesting) and documented as appropriate?
- Are issues requiring resolution dealt with promptly?
- Are all organisations sharing and learning from each others successes and mistakes?

Reviewing

- Has a time period been agreed after which the partnership will be reviewed? *This will help to ensure that all organisations are fulfilling their obligations, that expectations are being met, and that the partnership is delivering effectively.*
- Is the partnership achieving its objectives? To what degree are the outcomes sustainable? Has a method been devised by which to monitor and measure the effectiveness of the partnership and its activities? *An assessment of the partnership could be built into project or programme reviews and evaluations.*

Revising and renegotiating

- During the course of the relationship, particularly following a review, the structure or processes of the partnership may need to be revised. *If so, it will be useful to reconsider the points outlined in this checklist.*

Exiting

- Has the lifespan of the partnership been agreed? *Is it linked to or likely to extend beyond a specific project or funding period?*
- Have the circumstances under which the relationship may be ended prematurely been agreed and outlined in the MoU? *This could, for example, include changes in the wider environment (for example, new legislation, political issues, economic issues), resolution of the key issue the partnership was addressing, changes in funding, unfulfilled obligations, poor accountability and reporting.*
- Has a minimum notice period been agreed?
- Has ownership of any jointly held assets (including intellectual property) been agreed?



This document was made possible by the generous support of the American people through the United States Agency for International Development (USAID). The contents are the responsibility of Fauna & Flora International and do not necessarily reflect the views of USAID or the United States Government.

FFI is the world's longest established international conservation body, active in over 40 countries around the world, developing, implementing and managing biodiversity conservation projects in partnership with host country organisations. FFI's mission is to conserve threatened species worldwide, choosing solutions that are sustainable, based on sound science and take account of human needs.