Internal prospective partnership assessment

**USE**
To assess the value, risks and implications of a partnership opportunity and inform a go/no-go decision

**PARTNERING PHASE**
Scoping and building, prior to developing a partnership agreement

While partnerships have the potential to create significant value for an organisation, they are an important commitment that should not be entered into lightly. This tool is used to help organisations assess the value, risks and implications of a partnership in order that they can confidently go ahead, or understand what further information / negotiation / internal alignment is required. All but the simplest partnering is iterative in approach, with more and more relevant information becoming available as the partnership takes shape. Hence this tool is a living document, updating and adjusting as the details become better known.

The tool is in two parts: an information sheet to capture the current knowledge, and an at-a-glance checklist to see where the partnership is in terms of the criteria the partnership prospect must pass before going ahead.

### Checklist

<table>
<thead>
<tr>
<th>Area</th>
<th>Assessment</th>
<th>Outstanding issues / further information required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Acceptable partner (including due diligence)</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>2 Partnership fits with organisational mandate and is strategic</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>3 Partnership provides significant value / impact</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>4 Costs acceptable in relation to value gained</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>5 Implications are acceptable</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>6 Risks are sufficiently low or well mitigated</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>7a Sufficient financial resources to implement</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>7b Sufficient internal resources / capacities available</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>7c Sufficient buy-in from relevant staff / divisions / country offices</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
<tr>
<td>8 Clear measure of success for the organisation</td>
<td>Not acceptable</td>
<td>Acceptable with adjustments</td>
</tr>
</tbody>
</table>

Decision status as of date: **Decline | Continue to pursue | Go ahead**
1. Prospective partner(s)
- Partners’ interests / priorities and assessment of alignment with ours
- Partners due diligence assessment
- Partners’ values and assessment of sufficient compatibility for type of partnership
- Any previous experience of partner to date

2. Fit
- With organisational mandate
- With organisational strategy
- With current programmes / obligations / other partnerships

3. Benefits / value
**Mission value:**
- Contribution towards mission / impact for ultimate beneficiaries

**Organisational value:**
- Increased capacity to deliver
- Increased technical expertise / knowledge
- Additional resources / funds
- Creativity / innovation / sustainability
- Positioning / visibility / positive branding / reputational
- Increased social and political capital
- Influence
- Access to new networks / constituencies
- Making the organisation increasingly a ‘partner of choice’

4. Costs
- Analysis of transaction, implementation and possible overrun cost

5. Implications
- What precedent (if any) does it set?
- Obligations / commitments being made – is there an ‘exit strategy’?
- Effect on other relationships / reputation
- Accountability issues

6. Risks

   *Note that the risks below are risks relating to engaging with partnership itself. There will also be risks related to project delivery.*

- Loss of programmatic focus
- Duplication of efforts
- Overlong time investment
- Financial implications
- Lack of sufficient capacity to deliver
- Empowering others without legitimacy or interference with natural systems / distorting the market
- Compromise neutrality or independence / reputational issues
- Loss of autonomy on key issues
- Risk to existing relationships
- Implied endorsement

7. Organisational capacity / buy-in
- Funding sources for implementation
- Internal buy-in from internal senior champion plus relevant staff / offices
- Sufficient resource that can be committed
- Sufficient internal skills and competencies to deliver

8. Measures of success
- Clear measures of success from the organisation’s perspective

Ideally, all partners would follow a similar approach, using this tool to guide them through their own internal partnership journey, and providing at-a-glance clarity over what extra information or negotiation is required.

Once all the checkboxes are green, the partner should be ready to sign! If any are red, the partnership should not go ahead - or at least not without very careful consideration of the risks and senior-level sign-off.