



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

■ Not acceptable ■ Acceptable
■ May become acceptable with adjustments ■ Insufficient information

Area	Assessment				Outstanding issues / further information required
1 Acceptable partner (including due diligence)					
2 Partnership fits with organisational mandate and is strategic					
3 Partnership provides significant value / impact					
4 Costs acceptable in relation to value gained					
5 Implications are acceptable					
6 Risks are sufficiently low or well mitigated					
7a Sufficient financial resources to implement					
7b Sufficient internal resources / capacities available					
7c Sufficient buy-in from relevant staff / divisions / country offices					
8 Clear measure of success for the organisation					
Decision status as of date:					Decline Continue to pursue Go ahead



Prospective partnership information

Overview

- Context and drivers
- Vision, mission, objectives and activities
- Value-add of partnering
- Non-partnership alternative approach (if applicable)
- Expected role of organisation

Outstanding issues and next steps

- What decisions / negotiation / information is required?
- What specific further actions are recommended, by when and by whom?

1. Prospective partner(s)

- Partners' interests / priorities and assessment of alignment with ours
- Partners due diligence assessment
- Partners' values and assessment of sufficient compatible 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 over-run 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.