1.5 SCOPING AND BUILDING

Internal prospective partnership assessment

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

WHEN
Scoping and building, before developing a partnering agreement

WHO
Your organisation, internally

Partnerships can create significant value for an organisation, but they are an important commitment that should not be entered into lightly. This tool helps an organisation assess the value, risks and implications of a partnership so it can go ahead with confidence, or see what further information, negotiation or internal alignment it needs.

All but the simplest partnering is iterative, with more information becoming available as the partnership takes shape. So treat this as a living document, updated as the details become clearer. It has two parts: an information sheet capturing what you know, and an at-a-glance checklist of the criteria the prospect must pass before going ahead.

> Ideally every partner follows a similar approach, using this tool to guide its own internal journey and to see at a glance what extra information or negotiation is needed. When all the checks are green, you should be ready to sign. If any are red, do not go ahead, or not without very careful consideration of the risks and senior-level sign-off.

Part 1: Information sheet

Overview

- Context and drivers
- Vision, mission, objectives and activities
- The value added by partnering
- The non-partnership alternative, if there is one
- Your organisation's expected role

1. Prospective partners

- Their interests and priorities, and how well they align with yours
- Due diligence on each partner
- Their values, and whether they are compatible enough for this type of partnership
- Any previous experience of the partner

2. Fit

- With your mandate
- With your strategy
- With current programmes, obligations and other partnerships

3. Benefits and value

- **Mission value:** contribution to mission and impact for ultimate beneficiaries; financial implications
- **Organisational value:** capacity to deliver; technical expertise; resources and funds; creativity, innovation and sustainability; positioning and reputation; social and political capital; influence; access to new networks; becoming a "partner of choice"

4. Costs

- Transaction and implementation costs, and the risk of overruns

5. Implications

- What precedent, if any, it sets
- Obligations and commitments, and whether there is an exit strategy
- Effects on other relationships and reputation
- Accountability issues

6. Risks of partnering itself

- Loss of programme focus; duplication; overlong time investment
- Not enough capacity to deliver
- Empowering others without legitimacy, or interfering with natural systems or markets
- Compromised neutrality, independence or reputation
- Loss of autonomy on key issues; risk to existing relationships; implied endorsement

7. Capacity and buy-in

- Funding sources for implementation
- Buy-in from a senior champion and relevant staff and offices
- Enough resources and skills that can be committed

8. Measures of success

- Clear measures of success from your organisation's perspective

Outstanding issues and next steps

- What decisions, negotiation or information are needed?
- What further actions are recommended, by when and by whom?

Part 2: At-a-glance checklist

× Not acceptable ~ May become acceptable with adjustments ✓ Acceptable ? Insufficient information

Criteria

	×	~	✓	?
1. Acceptable partner, including due diligence	☐	☐	☐	☐
2. The partnership fits your mandate and is strategic	☐	☐	☐	☐
3. The partnership provides significant value or impact	☐	☐	☐	☐
4. Costs are acceptable in relation to the value gained	☐	☐	☐	☐
5. Implications are acceptable	☐	☐	☐	☐
6. Risks are low enough, or well mitigated	☐	☐	☐	☐
7a. Enough financial resources to implement	☐	☐	☐	☐
7b. Enough internal resources and capacity available	☐	☐	☐	☐
7c. Enough buy-in from relevant staff, divisions and country offices	☐	☐	☐	☐
8. Clear measures of success for your organisation	☐	☐	☐	☐

Area	Outstanding issues and further information needed

Decision status as of (date)	Decline	Continue to pursue	Go ahead

Adapted from The SDG Partnership Guidebook (Tool 3, p.82). © The Partnering Initiative. More tools at thepartneringinitiative.org/resources/type/tool/