5.1 BUILDING ORGANISATIONAL CAPABILITY

Partnering policy checklist

USE IT
To write a policy setting the guiding principles, values and rules of your organisation's approach to partnering

WHEN
When setting up the foundations for partnering; review periodically

WHO
Your organisation, involving the managers who will apply it

A partnering policy guides how your organisation enters into and manages partnerships. It helps staff and members make sound, consistent and efficient decisions, and reduces organisational risk.

A strong policy…

- gives guiding principles, values and rules for decisions now and in future
- stays fixed for a long time, but is reviewed periodically or when circumstances change significantly
- applies to decisions taken regularly: here, assessing and approving new partners and partnerships
- has a clearly defined audience, usually including the senior managers responsible for making sure decisions follow policy

A policy does not…

- set strategy: it sits below strategy and helps implement it
- give detailed guidance on activities: it focuses on principles and rules for decisions

Involve key members of the audience in designing the policy so they fully agree with how it will be applied, and make sure anyone commenting understands why partnering matters to your organisation and what the policy is for. Consider an external version so potential partners know what to expect; a short, simple policy can be shared as it is.

What to include

Purpose and context

The purpose of the document	☐
Your organisation's mandate	☐
Why partnerships matter to you, in one sentence (it is expanded later)	☐
Your "unique selling point" as a partner	☐

Scope

- [ ] Who the policy applies to, and in what circumstances
- [ ] Definitions of partner, partnership, and the types of organisation you may partner with, such as business, civil society or government

Partnership vision

- [ ] The issues you want to address, or activities to undertake, through partnership
- [ ] The added value you expect for your organisation and its goals (see tool 1.6)
- [ ] The added value you expect for your partners
- [ ] The kinds of resources that might be exchanged or combined: financial, technical, human and so on

Values and principles

- [ ] Your organisation's values, and any standards that guide its work
- [ ] The principles you expect every partnership to follow, typically transparency, equity, mutual benefit, mutual accountability and a focus on results
- [ ] Other policies or standards partners would need to respect

Potential partners

- [ ] The characteristics of an ideal partner: sector, goals, ethics, reputation
- [ ] Characteristics that call for closer scrutiny before partnering
- [ ] Characteristics that always exclude an organisation from partnering

Partnership selection

- [ ] A short summary of how partners are vetted and partnerships approved, usually backed by a due diligence and approval process
- [ ] The factors to weigh in deciding whether to pursue a partnership: added value to your mission; other benefits to your organisation; enough resources, and costs in balance with benefits; the partner's interests and motivation; its reputation, capacity, values and mission; the level of risk

Adapted from How to strengthen collaboration (Tool 1). © The Partnering Initiative. More tools at thepartneringinitiative.org/resources/type/tool/