3.1 REVIEWING AND REVISING

Partnership health check

USE IT
To review the health of the partnership and agree areas for discussion and improvement

WHEN
During implementation: informally every few months, and as a formal review every six or twelve months

WHO
All partners together

Monitoring the health and efficiency of how a partnership is set up and run, and making sure the building blocks of partnership are in place, is essential if it is to achieve its full impact.

You can use parts of the checklist informally and often, for example every few months as a prompt for discussion at partner meetings. Below is a more formal review workshop to hold every six months or once a year. Where there are many partners, or significant issues are raised, use an external facilitator.

1 Before the workshop

- Ask every partner to complete the checklist, scoring where they feel the partnership sits on each aspect of good practice.
- Analyse the results to prioritise areas for discussion at the workshop.

2 At the workshop

- Agree ground rules that encourage openness: the review is not about judgement or blame, but a chance to raise issues, learn together and improve the partnership.
- Present the analysis and talk through each aspect, and the positive experiences or challenges partners have had with it.
- Aim to fully understand and appreciate partners' different organisational perspectives and other sources of diversity.
- Discuss how each aspect could be enhanced or improved to everyone's satisfaction, and prioritise.
- Agree what action will be taken, by whom (wherever possible by more than one partner) and by when.

3 After the workshop

- Carry out the agreed actions, conferring with partners and keeping everyone informed of progress.
- Check with partners that things have improved.

Partnership health indicators

0 Completely disagree | 1 Strongly disagree | 2 Somewhat disagree | 3 Somewhat agree | 4 Strongly agree | 5 Fully agree | DK Don't know | NR Not relevant

1. Fundamentals

	0	1	2	3	4	5	DK	NR
There is significant alignment of interest among partners, and a compelling shared vision, mission and objectives fully bought into by all	☐	☐	☐	☐	☐	☐	☐	☐
The partnership has clearly identified collaborative advantages to create significant added value and deliver more than the sum of its parts	☐	☐	☐	☐	☐	☐	☐	☐
The partnership is designed to deliver net value to all partners	☐	☐	☐	☐	☐	☐	☐	☐
* Partners (particularly smaller or local partners) are empowered and enabled to contribute fully, including through simplified funding and accountability requirements where needed	☐	☐	☐	☐	☐	☐	☐	☐
The partnership is able to engage all key stakeholders with essential resources, including local knowledge and social capital	☐	☐	☐	☐	☐	☐	☐	☐
There is enough compatibility of values across partners to work effectively together	☐	☐	☐	☐	☐	☐	☐	☐

2. Partnership relationship

	0	1	2	3	4	5	DK	NR
All partners demonstrate clear, ongoing commitment to the partnership	☐	☐	☐	☐	☐	☐	☐	☐
All partners are transparent about their incentives, assumptions, goals, needs, drivers and constraints	☐	☐	☐	☐	☐	☐	☐	☐
There is a very high level of trust among all the partners	☐	☐	☐	☐	☐	☐	☐	☐
* There is clear equity and balance among the partners in decision-making	☐	☐	☐	☐	☐	☐	☐	☐
* Partners embrace, honour and value diverse cultures, languages and ways of knowing and being	☐	☐	☐	☐	☐	☐	☐	☐
All partners feel accountable to each other for delivering on their commitments, and collectively accountable to stakeholders, including funders	☐	☐	☐	☐	☐	☐	☐	☐
The benefits accruing to the partners feel fair and in balance	☐	☐	☐	☐	☐	☐	☐	☐
* Power imbalances are acknowledged, and action is taken to reduce them and any negative effects	☐	☐	☐	☐	☐	☐	☐	☐
Challenges, problems and tensions are raised openly and dealt with respectfully and collectively	☐	☐	☐	☐	☐	☐	☐	☐

3. Structuring and set-up

	0	1	2	3	4	5	DK	NR
There is a partnering agreement in place, clearly setting out the vision, mission, objectives, partner obligations, benefits and so on	☐	☐	☐	☐	☐	☐	☐	☐
There is a clear theory of change (or theory of transformation), with a measurement framework to demonstrate progress and success	☐	☐	☐	☐	☐	☐	☐	☐
For larger or more complex partnerships, a manual or "playbook" sets out governance, management, financial and operational structures; processes, principles and expected behaviours; and rules such as those on external communication	☐	☐	☐	☐	☐	☐	☐	☐
The fiduciary and legal structure is fully fit for purpose	☐	☐	☐	☐	☐	☐	☐	☐
* The governance structure is fully fit for purpose, including ensuring equity among partners and integrating the voices of those closest to the ground (local partners, stakeholders, "beneficiaries")	☐	☐	☐	☐	☐	☐	☐	☐
The management and operational structures are fully fit for purpose	☐	☐	☐	☐	☐	☐	☐	☐

3. Structuring and set-up

	0	1	2	3	4	5	DK	NR
The partnership is well positioned, with strong political and social capital with key influencers and networks	☐	☐	☐	☐	☐	☐	☐	☐
The partnership has the right staff, with the right skills and enough capacity to deliver	☐	☐	☐	☐	☐	☐	☐	☐
The partnership is fully resourced financially	☐	☐	☐	☐	☐	☐	☐	☐
Required knowledge and data are fully available	☐	☐	☐	☐	☐	☐	☐	☐
All other necessary resources are available	☐	☐	☐	☐	☐	☐	☐	☐

4. Management and leadership

	0	1	2	3	4	5	DK	NR
The secretariat is fully effective in its role	☐	☐	☐	☐	☐	☐	☐	☐
Internal communication and information sharing are frequent and effective enough	☐	☐	☐	☐	☐	☐	☐	☐
The workplan, and partners' roles and responsibilities, are always clear	☐	☐	☐	☐	☐	☐	☐	☐
Deliverables and timeframes are always clear	☐	☐	☐	☐	☐	☐	☐	☐
Financial management is timely and fully effective	☐	☐	☐	☐	☐	☐	☐	☐
External communication and engagement are fully effective	☐	☐	☐	☐	☐	☐	☐	☐
The partnership monitors progress against its implementation, output and impact goals, and along its theory of change	☐	☐	☐	☐	☐	☐	☐	☐
The partnership adjusts its approach (including its workplan and theory of change) based on experience	☐	☐	☐	☐	☐	☐	☐	☐
The partnership carries out regular health checks and acts to stay fully optimised	☐	☐	☐	☐	☐	☐	☐	☐
* Differences in organisational culture are acknowledged and well managed to avoid clashes	☐	☐	☐	☐	☐	☐	☐	☐
There is strong collective leadership among all the partners	☐	☐	☐	☐	☐	☐	☐	☐
The partnership ensures full engagement with, and accountability to, its stakeholders	☐	☐	☐	☐	☐	☐	☐	☐
Meetings happen with appropriate frequency	☐	☐	☐	☐	☐	☐	☐	☐
* Agendas and meeting logistics (including any representation or translation needed) ensure inclusivity and full engagement of all partners	☐	☐	☐	☐	☐	☐	☐	☐
Meetings are well prepared and documented, and minutes are circulated promptly	☐	☐	☐	☐	☐	☐	☐	☐
Any conflicts of interest are always managed effectively	☐	☐	☐	☐	☐	☐	☐	☐
Partners consistently attend meetings and are represented at an appropriately senior level	☐	☐	☐	☐	☐	☐	☐	☐
Decisions are made inclusively, with the right information, in a timely and efficient way	☐	☐	☐	☐	☐	☐	☐	☐

5. Delivery and impact

	0	1	2	3	4	5	DK	NR
All partners are fully and effectively delivering their commitments and obligations	☐	☐	☐	☐	☐	☐	☐	☐
The partnership is fully on track to implement its workplan on schedule	☐	☐	☐	☐	☐	☐	☐	☐
The partnership is fully on track to deliver its impact objectives	☐	☐	☐	☐	☐	☐	☐	☐
The partnership is delivering, or is on track to deliver, significant net value to my organisation	☐	☐	☐	☐	☐	☐	☐	☐

* Equity indicators, drawing on IIED's work on equitable partnerships.

Adapted from The SDG Partnership Guidebook (Tool 7, p.91). © The Partnering Initiative. More tools at thepartneringinitiative.org/resources/type/tool/