TOOL 7

Tool 7: Partnership healthcheck

USE
To review the 'health' of the partnership, determining areas for discussion and improvement

PARTNERING PHASE
Implementation

Monitoring the health and efficiency of the partnership's setup, operation and processes, ensuring the building blocks of partnerships are in place, is essential to optimise partnership impact.

Parts of the framework can be used informally and regularly – for example every few months – as a prompt for discussion in partner meetings to help keep the partnership on track.

Below is the description for a more formal review workshop that could be held every six months or annually. Where there are many partners, or where there are significant issues raised, an external facilitator should be used.

1

Review workshop: preparation

Ask all partners to complete the checklist below, giving a score on where they feel the partnership sits relative to each aspect of good practice in partnering:

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

Analyse the results to prioritise the areas for discussion at the workshop.

2

At the review workshop

Agree 'ground rules' to encourage openness and participation, making it clear that the review is not about judgment or blame, but a positive opportunity to bring up issues, learn together and improve the partnership;

Present the checklist analysis, jointly talk through each partnering aspect and the positive experiences or the challenges partners may have around it;

Aim to fully understand and appreciate your cross-organisational perspectives or other sources of diversity;

Talk through how each aspect of partnering could be either further enhanced or meaningfully improved to the satisfaction of all partners, and prioritize;

Determine what actions should be undertaken, by whom (wherever possible by more than one partner) and by when.

3

Post review workshop

Undertake the agreed actions, conferring with partners, keeping all informed on progress;

Confirm with partners that the aspects have improved.

TOOL 7

Partnership health indicators

1. FUNDAMENTALS	
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, deliver more than the sum of its parts towards its objectives	
The partnership is designed to deliver net value to all partners	
* Partners (particularly smaller or local partners) are sufficiently empowered and enabled to be able to contribute fully (including appropriate simplified funding / accountability requirements where required)	
The partnership is able to engage all key stakeholders with essential resources (including local knowledge, social capital)	
There is sufficient compatibility of values across partners to be able to work effectively together	
2. PARTNERSHIP RELATIONSHIP	
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 taken to reduce imbalances and any negative effects of imbalances	
Challenges, problems and tensions are openly brought up and dealt with respectfully and collectively	
3. STRUCTURING AND SET-UP	
There is a partnering agreement in place, clearly setting out a vision, mission, objectives, partner obligations and benefits etc.	
There is a clear theory of change (or theory of transformation), along with a measurement framework to be able to demonstrate progress and success	
(For larger / more complex partnerships) there is a manual or 'playbook' setting out the governance, management, financial and operational structures; processes and principles / expected behaviours; rules (e.g. around external communication)	
The fiduciary / legal structure is fully fit for purpose	
* The governance structure is fully fit for purpose, including ensuring equity among partners and the integration of the voices of those closest to the ground / greatest understanding of context (local partners, stakeholders, 'beneficiaries' etc.)	
The management and operational structures for the partnership are fully fit for purpose	

3. STRUCTURING AND SET-UP (CONT.)	
RESOURCES	
The partnership is well positioned and has strong political and social capital with key influencers and networks	
The partnership has the right staff, with the right skills and sufficient bandwidth to deliver	
The partnership is financially fully resourced	
Required knowledge and data is fully available	
All other necessary resources are available	
4. MANAGEMENT AND LEADERSHIP	
The secretariat is fully effective in delivering its role	
Internal communication and information sharing is sufficiently frequent and effective	
Workplan, roles and responsibilities of partners are always clear	
Deliverables and timeframes are always clear	
Financial management is timely and fully effective	
External communication and engagement is fully effective	
The partnership monitors its progress against implementation, output and impact goals, and along its theory of change	
The partnership iterates and adjusts its approach (including workplan, theory of change, etc.) based on experiences to date	
The partnership undertakes regular health checks and takes action to ensure it remains fully optimized	
* Organisational cultural differences between partners 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 AND WORK PROCESSES	
Meetings happen with appropriate frequency	
* Setting of agendas and arrangement of meeting logistics (including any necessary representation / translation) ensure inclusivity and full engagement of all partners	
Meetings are well prepared with good documentation, and minutes are taken and circulated in a timely fashion	
Any conflicts of interest are always effectively managed	
Partners are consistently present at meetings and represented by appropriately senior level	
Decisions are made inclusively, with the right information, in a timely and efficient way	
5. DELIVERY AND IMPACT	
All partners are fully and effectively delivering their commitments and obligations	
The partnership is fully on track to implement its work plan according to schedule	
The partnership is fully on track to deliver its impact objectives	
The partnership is currently delivering / is on track to deliver significant net value to MY organisation	

SCORING

0: Completely disagree
1: Strongly disagree
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* Equity indicators. See: https://www.iied.org/principle-practice-what-southern-leadership-reveals-about-equitable-partnerships