

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	May become acceptable with adjustments	Acceptable	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
- Partners' commitment and expectations
- Due diligence (inc. value fit)
- Working 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

6. Risks

Note that the risks below are risks relating to the *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