



Making Partnerships Effective

TWG Partnership Review Tool

**(A product developed as part of Stage 2
of the Project on Making Partnerships Effective)**

30 September 2009

TWG Partnership Review Tool

Introduction¹

This tool is designed to help you review a partnership to assess whether it is achieving the goals and expectations of the individual partner organisations. It is essentially a **health check of the partnership** rather than a more formal audit or evaluation of the programme of work that the partners have undertaken. The intention is that partners will work through the process together and, by doing so, will understand what more is needed to strengthen the partnership and make it more effective and productive.

How to use this tool

- The idea of undertaking a review should be discussed with the partners and the precise approach adapted to suit the specific requirements of the partnership
- Ideally the process will be undertaken willingly as a welcome opportunity to take stock, celebrate progress and identify where things could work better
- Partners should be given a copy of the agreed template and asked to prepare for the review by thinking through the questions / issues in advance – where appropriate having discussions with other stakeholders to gather their views.

Review facilitation

- One (or two) people should be identified as ‘review facilitators’ whose task will be to help partners work through the process systematically and respectfully. They can come from within the partnership, from CDC or from an external organisation with the appropriate experience. Whoever undertakes this role must have:
 - Knowledge of partnership as a sustainable development mechanism
 - Credibility with all the partners as being non-judgmental
 - Good listening, speaking, data collection and reporting skills
 - Authority to manage the review process without hindrance.

¹ Making Partnerships Effective - Products from Stage Two, September 2009

How to use the review findings

The review findings are **for the partners** rather than for any external evaluators. Partners can use the review process in a number of ways including:

- **Recording what has worked well** and the value the partnership has brought to the partner organisations
- **Identifying where things are working less well** and agreeing to take specific actions (whether behavioural or technical) to improve the situation
- **Setting a benchmark for good partnering practice** against which to assess progress in the future
- **Building stronger, more open working relationships** that can help the partnership to become more confident, innovative and ambitious
- **Making informed strategic decisions** for example whether new partners should be invited into the partnership or whether the remit of the partnership should be adjusted / expanded.

Sharing lessons

The review process is likely to reveal many useful lessons about partnering and the partnering process. These can be distilled (removing any issues that are specific to the partnership or confidential) and usefully shared with other partnerships – ensuring better inter-partnership communication and support.

All partnerships work better when the surrounding ‘enabling environment’ is favourable.

Partnership Review Template²

AIMS	Optional Activities
<p>To offer partners an opportunity to reflect on the value of the partnership from their own organisation's perspective</p>	<ul style="list-style-type: none"> ▪ 1:1 conversations with key players from each partner organisation undertaken by a nominated 'reviewer' that are then written up as a narrative for partners to discuss together ▪ Group workshop – run separately within each partner organisation – undertaking a SWOT analysis (exploring Strengths, Weaknesses, Opportunities and Threats in the partnership) which are then 'matched' across the different partner organisations ▪ Meetings in pairs (2 individuals from different partner organisations meeting as 'critical friends') for a frank exchange of views that are then shared at a partners' meeting / workshop
<p>To assess what – if any – changes would improve the effectiveness of the partnership</p>	<ul style="list-style-type: none"> ▪ Change of focus – can be explored through a 'scenario planning exercise' where partners are invited to think more imaginatively about the partnership's future. ▪ Re-definition of roles and responsibilities – partners invited to undertake a roles / skills re-assessment and re-assigning responsibilities between partners to tackle new tasks differently ▪ Institutionalisation – engaging a larger number of different people from the partner organisations in the work of the partnership
<p>To agree as a group to any revisions to the partnership agreement to take account of the findings of the review process</p>	<ul style="list-style-type: none"> ▪ Re-writing the Partnering Agreement to reflect new goals; changes of focus or new activities ▪ Expanding the partnership – either by incorporating new partners or by publicising its activities and achievements and supporting others in creating similar initiatives ▪ Developing a termination or moving on strategy – for the project, or the partnership, or one or more of the partner organisations. Moving on can mean 'job well done' it does not have to be interpreted as failure. A healthy partnership copes with closure / changes / departures in a creative and positive way

² The *Partnership Review Template* is taken from *The Partnering Toolbook* now available in Khmer as well as English. Copyright: The Partnering Initiative.