Facilitating Partnership Reviews

How to facilitate a partnership review process as part of monitoring and learning in partnerships

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1. Introduction

Why this guide and how to use it?

In order to work in a truly developmental partnership, the partner organisations regularly need to stop a little, reflect, learn and plan ahead on the continuation of the partnership. A Partnership Review is an important process to ensure that we deliver on our commitments and that we learn and change as we go along in our collective working relationship. This should by no means replace regular joint meetings and monitoring between partners in the course of implementation. The process is best facilitated by a Partnership Adviser/Staff, a Learning & Development or Programme Quality unit or similar cross-cutting functions in order to ensure neutrality and mutuality in the process. Managers or staff from both partner organisations/programmes directly involved in the management of the partnership or the implementation of the project or programme in question should be equal participants in the process, but could however facilitate specific sessions during the workshop.

This facilitator guide provides you with ideas and suggestions on how such a Partnership Review could look like. It is meant as a tool for the facilitator of the process. You will in the guide find ideas, questions, approaches and techniques that can be drawn upon for partnership review processes in terms of:

- continuously building relationships between partners
- working with the tensions that emerge in the process of the partnership
- reviewing how the partnership is delivering for children – the developmental outcome or the community-felt impact
- reviewing the partnership process itself and to which extend the partnership is both empowering and efficient and suggesting changes to the partnership agreement
- setting new objectives or reviewing indicators (if relevant) for the continued partnership or agreeing on a phasing out process of the partnership
- exploring new capacity and support needs of both partners

However, there is no one way of working with partners or organisations. There are no formulas. It is therefore important that this resource is used as a set of suggestions or ideas and not as a manual to be followed chronologically and applied in any context with any partner. The ideas/exercises suggested in this guide are too many for a two-day workshop. ***The facilitator needs to look at the specific situation and the type and capacity of the partner and partnership in choosing which elements to include in the process***. Various resources and one's own experience and practice (and reflection on this practice) are the key resources for this. This guide suggests ways of how one might go about doing this.

New ideas and exercises can be added along the way as the partnership advances into new phases and the complexity of the relationship increases.

The ideas and techniques reflected in this guide are developed based on processes and best practices during 2010, 11 and 12 in Save the Children's Sierra Leone programme in line with the development and implementation of the Partnership & Civil Society Development Strategy and are therefore tested on partnerships with local civil society organisations. However, some of the ideas could be adapted and used with other types of partnerships, for instance with government or private sector institutions.

The ideas and techniques are adapted or developed by Dorte Jørgensen partly based on the publications; Ideas for a Change part 7a & b on Developmental Partnerships from Olive OD & Training, South Africa (now distributed by Footsteps) and inspired by resources from Save the Children Denmark's Partnerships & Capacity Building modules from 2010.

What does our Partnership & Civil Society Development Strategy say about Partnership Reviews?

The Partnership Management Cycle of the Partnership & Civil Society Development Strategy for the Sierra Leone programme prescribes a 2-day Partnership Review Workshop annually followed by or simultaneously repeating the Organisational Assessment of the local partner, using the organisational assessment tool again. The last-mentioned is in order to continuously monitor and document changes/improvements in organisational capacity of the partner organisation that could be a result of the partnership or other relationships or situations.

The two documented processes give us important knowledge on what impact is generated from the partnership depending on how we work together and whether and how to move forward in this type of partnership. At the same time, it gives partners information on what capacity building opportunities we should embark on if continuing the partnership.

The partnership review is part of the monitoring process and therefore falls under the fourth phase of the Partnership Management Cycle; ***Phase 4, Monitoring & Evaluation - feedback & learning.*** In this phase of the PMC, Save the Children's commitments are:

- Ensuring the development of a plan and tools to monitor and evaluate the implementation of the activities and the partnership
- Ensuring that objectives and indicators are created and monitored concerning capacity building of the partner organisations and concerning the partnership process
- Ensuring that regular partnership meetings are held, where the quality of the partnership and its achievements are reviewed
- Being frank and open about constraints and limitations and proactively raise issues of concern as they arise and listen with respect to partner perspectives

- Not making demands on partner organisations that we cannot live up to ourselves
- Institutionalising feedback and complaints procedures for partner organisations as a process of dealing with unresolved issues as well as conflicts
- Organising Annual Partnership Forums for learning and exchange between Save the Children and all its partners

In our Partnership & Civil Society Development Strategy it is moreover stated that mechanisms for mutual accountability must be part of the partnership agreement which should spell out possibilities for reviewing the partnership. Apart from the accountabilities between the partner organisations, accountability needs to be considered towards a range of other stakeholders; the beneficiaries (the children) and their communities, the government, donors and other civil society actors. A written agreement is a good and important basis for the accountability process; however, a lot depends on the quality of the relationship and to what extent honesty, openness and trust is built, which again depends on individuals and their behaviour. Investing in the contracting process as part of building relations is crucial for accountability processes in partnership, both when it comes to achieving the agreed objectives and how these are achieved; has the partnership made a difference in the lives of children and in the partnering organisations?

This emphasises the importance of the partnership review process in ensuring quality partnerships that are both efficient and empowering for both partnering organisations.

Key questions to ask in ensuring proper monitoring, feedback, learning and change in the partnership:

- What mechanisms for monitoring, feedback, evaluation and review will be in place?
- How will the partnership review and assess the degree to which it has achieved its purpose (WHAT has been achieved), the approach, effectiveness in functioning (HOW has it been achieved) and the involvement and level of decision making of both partners in the process (WHO has it been achieved with)?
- Will the partnership be evaluated or will an impact assessment take place? And if not, how will we know whether we are making a change and should continue the partnership?

2. Preparing for the review process

How to ensure ownership?

It is important that the partnership review is as much a mutual process as the partnership assessment which is done before entering the partnership. Therefore, before starting your partnership review workshop, make sure that ***all partner organisations agree to the timing, the content and to the participants to be involved***. You can plan the partnership review

together with two or three local partners and Save the Children if these partners are similar, i.e. CBOs and involved in similar activities. In such cases, the partnership review can as well function as learning between local partner organisations and not only as learning with Save the Children. If several Save the Children thematic programmes are working with the same partner on different projects, assess whether it would be beneficial to hold a joint partnership review in order to harmonize approaches and procedures and in order to harmonize institutional and capacity support to the partner. If several INGOs or other development agencies partner with one of your partners, try to involve these in a joint partnership review in order to learn together and from each other and in order to further develop a harmonized approach to the partnership, i.e. harmonized capacity building, support, systems and procedures.

How long time?

Your workshop should last a ***minimum of two days***; however, if you feel that more time is needed for specific activity planning and budget preparation or training/follow ups in Child Safeguarding, Financial Management and Reporting, Accountability or any other area, you can consider adding an extra day.

Who should be involved?

It is important that the partnership review process ***involves the right people***; try to inspire the organisations that key programme and administrative staff as well as finance staff are essential. The ones taking decisions in the organisation and relevant thematic programme teams need to be present, i.e. the head of the organisations and possibly representatives of the board of directors/trustees. It is equally important that the technical people and managers related to the thematic area(s) on both sides are present. Finally, field staff or even volunteers (or representatives) directly involved in implementation (if it is a project partner) can be involved depending on the size of the organisation. Involving all levels of the organisation creates ownership and understanding about the partnership process. However, this can change from one review to the other for the process to serve different purposes.

Ensure that you ***prepare both organisations for the process*** they are about to go through by giving them an idea of the programme and delegating certain roles in the process, for instance by giving them presentations to do or facilitation roles in certain sessions.

Where?

The ideal venue for a partnership review workshop would be a neutral place, i.e. outside the premises of either of the two partners. This might however not be possible due to costs or practicalities, so use your common sense.

What to read before?

Make sure that you, as the facilitator, are well prepared. You need to familiarise or remind yourself of the following documents/past processes:

1. Partnership Agreement and annexes (plans & budgets)
2. Past Partnership Review reports
3. Partnership Meeting minutes
4. Partnership Assessment report
5. Organisational assessment of local partner

These documents will give you useful information on issues in the past in order to ensure that we review how they have been addressed during the cause of the partnership.

Ensure that you inform all participants to read and bring a copy of the partnership agreement to the workshop as they will be working actively with this. Make a few extra copies for participants that may not have had access to this.

3. Workshop Entry: Setting the scene & building relationships

Ensure that you prepare the hall before the start of the workshop. Make sure the hall is arranged in the shape of a horse shoe or circle, remove tables in order to create an open atmosphere and remove barriers for interaction. Ensure to decorate the hall with Save the Children and partner posters for information sharing, i.e. Vision, Mission, Values, Theory of Change, Child Safeguarding Policy Poster or any information material developed in the partnership. This helps us remind ourselves why we are working together. Ensure that you have any Save the Children and partner brochures for handouts and relevant printed new programme information.

Self-introduction

You can use your own imagination and methodologies for doing self-introduction with participants for it to become a bit more informative than just introducing people's names and positions. Make sure that all participants get an opportunity to reflect and say something from the on-set of the workshop. A good idea is to combine the self-introduction with participants' expectations.

Reflecting back

As a facilitator, ensure that both old participants (those that have been involved in the partnership from the beginning) and new have a bit of background information. You need to set the scene for the review. An idea is to introduce the following:

Annual Partnership Reviews are part of our obligations working with partners according to the Partnership & Civil Society Development Strategy and is also stated in all partnership agreements as an obligation. We need continuously to reflect on how the partnership is going and how we are delivering on commitments. This is done through regular meetings and sessions between partners. But once a year, we need to take time to stop, reflect, learn and plan for any new changes.

Key Questions we still need to ask ourselves

During our partnership assessment (mention the date for this – it might be one or two years back), we explored the following questions. Now that real work is being done and we are busy implementing, it becomes even more important to ask ourselves (on flipchart):

- How do we maintain the degree of trust and sharing that sparked our desire to work together?
- How do we know that the partnership is achieving its goals in the society and in each organisation – that it's not just a convenient and convivial form for a few individuals?
- How do we maintain energy and commitment when days and nights get long, deadlines loom, and/or the target group does not respond as we'd anticipated?
- How do we ensure that we respect each other's institutional boundaries, while exercising mutual accountability and development?

Remind participants of the type of partnership we agreed to be working towards when we went through the partnership assessment.

Developmental Partnerships

We also agreed and explored the concept of developmental partnerships as characterised by;

- their **redistributive** nature;
- a **high degree of mutuality** in decision-making, contribution and benefit; and
- the potential for increased (deeper, more sustainable) **impact in communities** through collective effort.

You can distribute or show a flipchart with the different types of partnerships (annex 2) as presented during the partnership assessment if you feel it is needed.

Purpose & Objectives of Partnership Review

Present the objectives of the Partnership Review:

Objectives

1. To work with the tensions that emerge in the process of the partnership (the extent to which partners' voices are heard and honoured, and the mutual capacity building that results);
2. To review how we are delivering on quality product (the developmental outcome or community-felt impact);
3. Review the extent to which interventions and the strategy of partnerships are both **empowering** and **efficient;**
4. To plan for the change we want to see in 2012 and plan for the mechanisms/processes necessary for that change.

These can be further expanded if it is a three-day workshop where any training such as financial reporting follow-up training or child safeguarding training or more detailed activity and budget planning can be done.

By thoroughly analysing where we were when we started and what improved, enhanced or changed by the end of the partnership, we can begin to identify not only the extend of change, but also plan for the mechanisms/processes necessary for change.

In plenary, present the programme for the two days; set the ground-rules and if you have time, ask participants to write expectations on cards or post-its and hang them on the wall. Alternatively, you can deal with expectations during the self-introduction.

Working with our Relationships

We have worked with each other as partners for at least one year. It can therefore be useful to do a game where we at the same time analyse and play around with the type of relationship we have with our partners. This exercise can also help us identify which areas of the relationship we need to work on.

Relationship Analogies

Distribute a number of cards and a marker to each participant. Ask them to reflect on how they see their relationship with their partner (the other organisation) at this moment. They can write one or two analogies to describe their relationship with their partner. Remember to explain that different staff can have different opinions or type of relationships as it can depend on the position in the organisation and the partnership. Try to explain the following analogies.

You can add other analogies that fit the specific situation/context if they are not covered in the following:

▪ Old Friend	=>	Familiar/Cordial
▪ New acquaintance	=>	New/undefined
▪ Stranger	=>	Welcoming/unknown
▪ Crying baby	=>	Time consuming/challenging
▪ Professor	=>	Educative
▪ Policeman	=>	Laws/regulative
▪ Explorer	=>	Inquisitive/curious
▪ Banker	=>	Resourceful
▪ Imam/pastor	=>	Trustworthy
▪ Broker	=>	Creates relationships/networks
▪ Student	=>	Builds capacity
▪ Thief	=>	Takes/hides

Let each participant show and explain in plenary the choice of analogy chosen for the partner and why (s)he sees the relationship like this.

Allow for a plenary reflection and comments on how it felt to do this exercise and what the participants, as individuals and organisations, learned from it.

The relationship exercise gives a fun and surprising start on the workshop and also helps us review our relationship and to be inspired to further build on, change or develop it. Other exercises working on our relationship can also be used to get the workshop started.

4. How are we delivering on our Commitments in the Partnership?

In order for us to review the partnership and how we have delivered on our commitments, we need to remind ourselves of the existing partnership agreement. This is an excellent opportunity for those in the room that might not be familiar with the existing agreement (which is often the case for field staff or volunteers). This will remind us how important sharing of information is in our organizations.

There are different ways of doing this. One way is to let the Programme Manager from Save the Children or the head of the partner organization present in summary the key points of the partnership agreement. It can be by a power-point presentation or on flipchart. Only ensure that you have some copies of the partnership agreement to be shared among participants, so that everybody can follow the pace.

Delivering on the commitments of the partnership

Ask participants to go into organisational groups with sufficient copies of the partnership agreement and discuss and take notes on drafting paper on the following:

For this exercise, ask participants *only to look at the commitments in terms of our obligations, on how we work together (relationships, communication, monitoring, feedback, reporting), the capacity development plan and the institutional support*. We will work specifically with the objectives and activities later in the workshop.

- What commitments have been kept by the partners? Also note if there are any best practices above the standard of the commitment
- What commitments are still outstanding?
- What should be changed in the renewed partnership agreement within the mandates of the organisations?

After the group-work, ask the groups to present one by one in plenary as you note on a central flipchart what is being said. If a point is repeated by several partner organisations, just tick the point again.

It is important that these points are **carefully documented** as we can learn from them moving into new phases of the partnership. Note specifically the areas that need revision or change and note down agreed suggestions. This can be used by the programme manager for the development of the new partnership agreement or an addendum if relevant.

Best practices mentioned by the partners should be shared more widely in the organisation after the workshop. This will ensure that best practices can be replicated in other partnerships and that the partnership reviews are therefore utilized as wider organisational learning and change to generally develop our partnership approach.

Beware, that this exercise can create extensive debate and sometimes tension in the room. It is your task, as a facilitator, to ensure a good atmosphere whiles allowing for openness, transparency and permitting frustrations to be let out. One way of doing this, is to ensure that comments are made on organisations only and are not personalised in this forum. If you notice a need for further discussion in a smaller forum or bilaterally between two heads to specify feedback, arrange for this after the closure of the day or the workshop.

5. Progress in the implementation of the project/programme

In order to adapt and review as we move on, we need to be able to look at our practices, achievements, challenges and learn from them.

Achievements, Challenges & Lessons Learnt

Before the group work, the facilitator needs to ensure a common understanding of the various terminologies used in the exercise. By experience participants have different understanding of the terms used and there is a risk of the exercise being misunderstood. You could present the following (on flipchart) which would be visible in the hall throughout the exercise:

What is an Achievement?

- NOT an Activity
- An accomplishment/result
- Something we managed to do really well which created a result/a change

Example: *Higher degree of openness towards discussing sexual issues with adolescents among parents; this can be seen by the increased number of parents taking active part in sensitization meetings and discussions*

What is a Lesson Learnt?

- NOT what you have been taught in a training
- A general learning that you have generated/had by analyzing series of situations during implementation
- Can be positive or negative

Example: *Having life skills facilitators based in the communities ensures ownership by communities and flexibility in the implementation (adapting to community needs).*

Recommendation: *Continue and further strengthen the community-based facilitators and ensure further relationships are built with communities through meetings and interaction*

Ask participants to be in organisational groups for the exercise. Let the groups use at least 1 hour for this exercise. 1 hour should be set aside for the gallery walk and synthesis, depending on the number of partners:

Analysing progress in the implementation of the project

In organisational groups discuss and list:

1. Achievements in 20xx; what went well? *NB: do not list all implemented activities, but only the successes*
2. Outstanding activities for 20xx and timeline for implementation; what were the gaps?
3. Challenges; what hindered effective implementation?

4. Lessons learnt & recommendations; what learning can we derive from the process in 20xx which we need to take into consideration as we move on – positive or negative? What do we suggest to continue or change?
5. Put down the key points on flipchart for presentation

After the group work, put the groups' flipcharts in different corners of the hall.

Now, the organisational groups will take a gallery walk having 15 minutes reading and reflecting on the analysis of each of the other organisation(s). They will pose questions/comments or acknowledgment of points and stick them on the presentations with post-it notes.

After all groups have rotated to all presentations and commented on them, the facilitator will go through only the questions and comments made by others' for each set of presentations. Allow the organisation to answer or elaborate on comments in plenary.

This process can be done in different ways, but by using this methodology, we do not spend extensive time listening to presentations, which can become very tiresome. Instead, it encourages participants to reflect in smaller groups on what is being pointed out by others. Finally, participants practice giving and receiving constructive feedback to their peers or partners.

6. Team Building

It is important to continuously work on the relationships throughout the workshop. This exercise or quiz is fun as it tests and challenges our knowledge about our partner and is a good idea to do at the start of the second day. By experience, the partner organisations know much more about Save the Children than we know about our local partners. As a facilitator, use it to illustrate how we still need to work more to have equal understanding and mutuality and respect in our partnership.

Knowledge of our Partner

Before the workshop, develop a number of questions (with answers) about each of the partner organisations in the workshop. It should be questions that you know everybody have had the opportunity to know from the partnership assessment process and/or from the various documents. It could be the thematic programmes of the organisation, the name of the director, the origin of the organisation, policies etc. There should be an equal number of questions to each organisation. Participants sit in organisational groups. Questions are given in plenary to individuals. If the individual feel he/she cannot answer, he/she can ask help from the group.

Explain the rules:

- Individual correct answer: plus 3
- Group correct answer: plus 1
- Incorrect answer: minus 1
- Cheating: minus 3

Have some sort of price/present prepared for the winner. Often, for local organisations, a variety of stationary is a welcome gift and/or publications/research material.

7. Documenting what we do together – quality reporting

It is a good idea to use the partnership review looking at the quality of our reports, both narrative and financial as reporting is essential for accountability to various stakeholders and essential in sustaining future funding. Moreover, working on our partners' capacity in reporting helps the partner obtain greater independence and sustainability.

Ideally, the quality of reports received would be discussed during the monthly or quarterly partner meetings. However this forum has a wider audience for learning.

Narrative Reporting

The session can be facilitated by the Programme Adviser or the Programme Manager in order to base it on the quality of narrative reports in the partnership under review.

Allow participants to brainstorm on the following and add if points are not mentioned. Ask participants to buzz in pairs first to allow for wider participation. After the pair discussions, get participants' inputs in plenary.

Remember the following if not mentioned:

Why do we need to report?

- Accountability to donors, partners and beneficiaries
- To monitor
- To assess and evaluate performance
- Information sharing
- To learn
- Etc.

What should a report contain?

- Introduction/executive summary
- Accurate data (# participants, age, gender etc)
- Time frame for activity/report
- Achievements
- Lessons learnt (**analysis**)
- Challenges
- Recommendations
- Evidence (pictures, case stories etc.)
- Financial report and supporting documents

What are the principles in good reporting?

- Make it simple – avoid big English!
- Pretend you are writing to someone who does not know anything about the issue
- Don't use jargon and abbreviations
- Be precise and honest!

The Programme Manager or adviser could embark on sharing of feedback from the past years' reporting; good points as well as challenges. Adapt it to the specific challenges in the reports, i.e. lack of analysis, sweeping statements without evidence or whatever are the weaknesses in the reports received.

A good idea is to share a report containing certain lapses/gaps and ask participants to analyse the quality of the report in groups and come up with recommendations for improvements. Ensure that you add points if they are not mentioned from the groups.

You can also use this session to share a 'model report' for future reference.

Financial Management & Reporting

In the Sierra Leone context, financial reporting often poses challenges to the partners and the programme managers in the partnership. It might therefore be a good idea to use the partnership review process to include an analysis of the financial reporting and management or even a small follow-up training. Ensure that you allow the finance team to give inputs as to what is needed with the particular partnership under review. This session might be left out if not needed. It should be adapted to the particular situation and partnership as well as to the capacity of the partner.

The session is best facilitated by the finance officer/team and you might help them with making the session participative and interesting. It is also important to enable the partner staff interact directly with the finance team and as such build trusting relationships and understanding.

The following exercises are developed fitting the specific situation in Sierra Leone with most partners having very basic capacity and systems of financial management.

Donor Requirements

For partners to understand some of Save the Children's procedures and principles, it is useful to reach an understanding of why some requirements may seem rigid from a partners' point of view.

Donor Requirements

Share the following statements randomly among participants. Ensure that you have printed one statement per paper.

1. Original bills, invoices, receipts and any other pertinent documentation should be kept by Save the Children and made accessible when require for review or audit.
2. Save the children should retain all original record for a period of at least 4 years after the termination or completion of this project
3. We do not acknowledge any contractual link between us and SC's Partners or subcontractor
4. Save the children alone shall be accountable to us for the implementation of this project
5. SC shall undertake the conditions applicable to its organization under the stipulated articles shall apply to its Partners and subcontractors
6. SC shall include provisions to that effect as appropriate in its contract with the partners/subcontractors

Ask the participants to read the statements one by one and elaborate on what they think it means. Allow participants to guess what these statements are.

If not guessed, reveal that they are statements from Save the Children's contracts with our various donors and explain that donors have different requirements, but these are the more general and common clauses.

This exercise is useful in a discussion on how donor requirements towards Save the Children also influence the demands we put on our partners. It generally helps the partner understand us better in knowing that we are not adding unnecessary demands and procedures on them

without reason. It helps partners understand that we too are accountable to supporters for the money we spend.

Supporting Documents

Sometimes, there is confusion on which type of supporting documents are needed for which type of expenditure. Save the Children needs original receipts and other documents for audit or review as per the donor requirements. Allow participants to brainstorm on what type of supporting documents Save the Children will need:

- Time sheets
- Original receipts (authentic)
- Attendance lists from trainings/meetings
- Payment vouchers (authorized)
- Invoices
- Quotations
- Authorized per diem forms and community receipts
- Payment sheets
- Delegation of duties

Some supporting documents that are not requirement, but can be considered as best practice and a good thing for the organisations to develop are:

- Request forms
- Goods receiving note
- Float formats
- Fleet movement form
- Fuel tracking form
- Petty cash book
- Bank book and signatories
- Cash book
- Cash count
- Audit report
- Bank statements

Another way of working with the topic of supporting documents and financial reporting is to share a case. The case should be a financial report from an 'imaginative' organisation. There could be both best practices and gaps in the case or a good and a bad case. Groups could now discuss the financial report and identify the best practices and the gaps. This should later be discussed and synthesized in plenary.

Challenges in Financial Reporting

During the year of the partnership cooperation, some challenges in partners' financial reporting may have arisen. When there are gaps in financial reports, approval of the reports delays and disbursement of funds delays as a consequence. This again causes delay in implementation of activities and, in the end, may lead to the partnership not achieving its objectives and not creating the expected outputs and outcomes.

Ideally, this should be dealt with during monthly partnership meetings or during support visits to partners by finance or programme staff. However, this has a wider audience and the exercise can help us identify the challenges on both sides. Make sure that the finance team identifies specific challenges for the partnership under review.

Challenges in Financial Reporting

Ensure that you post the following challenges (these are examples – it should be related to the specific partnership) in different corners of the hall together with an empty sheet of paper. These are real challenges from the financial reporting of the specific partner in the past year.

a) Late submission of financial reports
b) Mismatches between the report summary and receipts/supporting documents
c) Missing documentation for expenditure items included in the summary report
d) Mismatches in signature patters on attendance list
e) Inclusion of unbudgeted items into actual expenditure
f) Late disbursement of funds

Ask participants to go into mixed groups and allow 5 minutes at each challenge and ask them to come up with solutions on how to improve the situation and note them on the paper by the stated challenge. Rotate after 5 minutes until all groups have been reflecting on solutions for all challenges.

Summarise suggested solutions in plenary and try to agree on a few realistic ones. Document this for the action planning.

It is important that Save the Children also recognizes its mistakes or problems within the internal system. Actions relating to Save the Children should equally be noted down and commitments made, if possible.

8. Programme Development & Project proposals/ideas

For a true developmental partnership, partners should be involved in all phases of the programme cycle, i.e. the child rights situational analysis, the development/design of the country

strategy and thematic programme and of new project proposals. Partners should equally be involved in monitoring and evaluation.

The partnership review would be a good forum to share and work on how we involve our partners in any such new plans or ideas for new programme development, project proposals, joint monitoring, and upcoming evaluations etc. and likewise for the partner organisations.

In a situation where a project has already been developed without the participation of the partner, the project should be presented in this session. Allow sufficient time for partners to identify where they could contribute. It is important to allow for as much flexibility in this process to ensure openness and ownership. This is however a sub-contractual approach which we are trying to move away from, but which can sometimes be necessary.

Setting new objectives and indicators (project as well as process)

The process done during the partnership assessment in setting objectives for the partnership work can be done during the partnership review as well if relevant. It is important to jointly agree on overall key objectives and indicators for the project, the partnership and for the organisations. They might also be revised at the review process due to changes in context, beneficiary complaints, new funding opportunities or evaluation recommendations. Consult with the Programme Manager and Programme Adviser before the workshop to ensure that you include time for this if the programme is ready at this stage. If the project is at proposal stage, the adviser/proposal writer should facilitate a session where the partner and Save the Children together identify areas for the cooperation and strengths and interest areas of the partner.

If the project already exists, this session should be facilitated by the responsible Programme Manager as they are responsible for the implementation, but the main facilitator should ensure that objectives are developed concerning the partnership itself and the strengthening of the organisations. You can use the following framework, but other ideas can also be developed. Ensure that objectives being developed are SMART and realistic.

Note: The second column in this matrix is the ***'product' column***, what the partnership will achieve that will be used by the beneficiaries. Columns 3, 4 and 5 describe ***'process' and 'empowerment' indicators*** for the partnership. This matrix template ensures that consideration is taken to 'process' and 'empowerment' as well as to the 'product'.

Objectives	**More effective health & hygiene training methods developed**	**Enhanced training & facilitation design skills**	**Increased trust among partners**	**Enhanced reputation among partners**
1st Quarter	Research existing methods; Workshop with all partners to determine best practice	Work closely with more experienced trainers in partner organization to learn how training is	Assign clear guidelines and tasks for research process. Agree on values and principles which underpin 'best	Ensure that all staff have time and resources to prepare for meetings and workshops so they

		designed	practice'.	can participate effectively.
2nd Quarter	Develop pilot training programme with trainers from all partners; Pilot/Field test training.	Observe and co-facilitate aspects of pilot programme. Be an active part of the design and de-briefing process. Take lots of notes!	All partners share in keeping the focus on jointly decided 'best practice' principles. Keep lines of communication open during field testing, for example, regular thorough debriefings.	(same as above)
3rd Quarter	Debriefing workshop with trainers, management, external facilitator	Actively participate in debriefing process – state clearly what I've observed.	Ensure 'safe space' for people to voice their concerns or reservations.	(same as above)
4th Quarter	Revise methodology. Document methods and results	Share my notes and insights with others to build the documentation exercise. Participate in sharing forums	Ensure that all have input and share ownership of new method and that the document acknowledges the contributions of all	Ensure that the document acknowledges the contribution of all. Consider joint 'launch' of programme and positive results.

Example copied from: *'Olive OD & Training, South Africa (now Footsteps)': Ideas for a Change, Part 7b, 2000, page 26.*

The documentation of this exercise is important. Objectives and indicators agreed here or at a later stage in the process will be included in the Partnership Agreement which is the legally binding document. Alternatively, if this is too early or needs much more time, the partners can decide to have a meeting later to specifically agree on objectives and activities, which is perfectly ok.

How will we assess empowerment and efficiency?

Having described the change you are hoping to achieve, and the activities you will undertake, go back to the monitoring framework and consider how you will monitor both the empowerment and the efficiency of the partnership.

By now, you have identified broad objectives for what the partnership will deliver in the community/society and how the partnering people and organisations will grow and change over the course of the partnership. You have also formulated indicators which will assist you in assessing whether or not you are achieving your goals.

Considering these indicators prior the start of the project and partnership does not mean that they will not change over time. It is important that as the partnership deepens, indicators and especially process objectives are updated and modified. Making a conscious effort to articulate, from the beginning, what each partner wants, and how their progress may be assessed, adds depth to the partnership.

Creating the space to regularly check progress towards the goals of product and process with both empowerment and efficiency considerations strengthens the relationship and sense of purpose of the partnership.

Following is an idea on how to do this:

Monitoring our progress

Create four mixed groups (participants from all partner organisations in each group). Ask each group to work on one of the following questions and ensure that all questions are worked on. You may ask the groups to work on these questions with each their objective to save time.

1. How will we monitor the inputs: the time, money and other resources that have gone into this objective?
2. How will we monitor the outputs: what are the tangible outputs of our work?
3. How will we monitor the outcomes: how our goods/services are perceived by our beneficiaries, how our skills are enhanced, and the qualitative change in how we work together?
4. How will we assess the extent of the process/empowerment: the shift in the balance of power within the partnership – who leads? How are ideas valued?

Ensure there is a synthesis of the inputs from the various groups in plenary and allow for discussion.

If time does not permit, this can be worked on in smaller working groups after the Partnership Review.

9. Working with Tensions

Tensions are part of collaborative working relationships. It is important that we acknowledge this and work consciously with it. Ignoring it or putting our heads down does not make the tensions go away – on the contrary it might result in tensions turning into conflicts that are difficult to reverse. Therefore, it is a good idea to use the partnership review to work with some of the tensions that may inevitably arise during the partnership. Use your common sense in assessing the level of trust existing between the partners and how to approach this.

A tool which may assist people and organisations to assess the level of (dis)comfort that people and organisations may find in their partnerships is the Tension Analysis. It assists partners to identify potential areas of conflict, as well as new issues for the partnership to explore. It helps us come up with strategies for minimising tensions before they turn into conflicts and potentially threatens the partnership.

Tension Analysis

1. Draw the picture below as you explain:

2. Ask participants to ***map issues of tension or conflict between these levels/layers***. Encourage people to work in small groups, and consider the following questions:

- What tensions are there between your organisation and the community needs?
- What tensions arise between the different people, and the partnership as a whole?
- What tensions arise between their organisations and the partnership?
- Are there tensions between the partnership and external role players – or between the organisation and external role players?

Change or add other questions if you feel they fit better to the particular situation or that you need to touch on tensions you are aware exist and need to come out in the open.

Ask participants to write the tensions up clearly, on cards, and to physically post them between the relevant layers in the picture.

3. Use the Tension Analysis to ***discuss and review the partnership***, with partners, and to strategise ways/means of resolving the tensions before there is a conflict! Consider the following questions to guide your discussions:

- What issues of power are at play? What personal agendas have not been surfaced and/or addressed?
- Which tensions are resolvable? What could we do to resolve the tension (negotiate or change the implementation strategy, engage different members of staff from each organisation, communicate more frequently and with greater sensitivity to each other?)
- Are there tensions between either the partnership or the organisation and external role players which seriously threaten the partnership? The partners as individuals? What can we do about these, now, before they become an even bigger issue?

Are there ways that individuals, organisations or the partnership can be used to resolve tensions arising?

4. Identify the first ***three to five steps*** that your partnership, a particular organisation, or a person is able to take in order to work with one of the tensions which is pressing and/or resolvable. Consider what longer-term changes would be necessary in order to resolve this tension (consider how to allocate time and responsibility for working on this).

This exercise can be used again and again and be further developed as the partnership passes through various phases.

10. Organisational Capacity Development

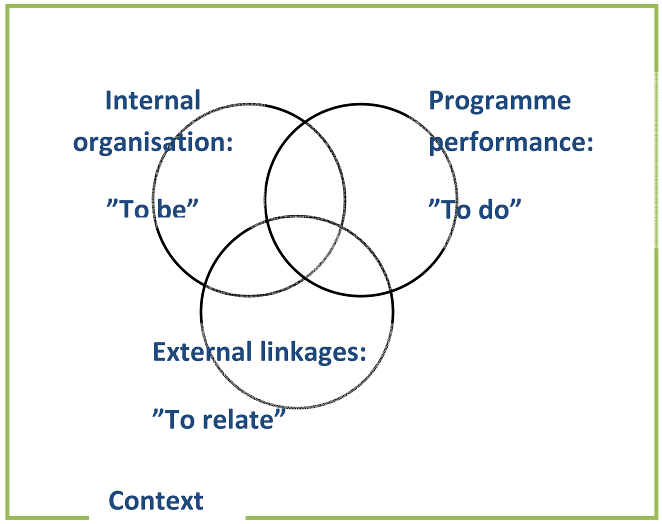
There is a need to revisit the issue of organisational capacity development. Start this session by referring to the organisational assessment or issues noted during the partnership process or during this review.

Start by presenting or repeating (if you dealt with this during the partnership assessment):

The development of organisational capacity can be consciously catalyzed ***(capacity building)*** or may emerge or be expressed as patterns of changed behaviour ***(capacity development)***. INTRAC 2009

When looking at an organisation's overall capacity to be successful in its mission, capacity can be understood in relation to:

- The demands and pressures from the external environment
- Its programme performance
- Its internal functioning and
- Its relationships



To do: is the work that the organisation does – for example human rights, health, education etc. This dimension includes a series of capacities related to project management, technical skills and knowledge/expertise in the topics which form the content of the organisation's programme, competencies in research, policy influencing etc.

To be: For an organisation to be able to effectively deliver the programme and fulfil its mission, it needs to have a strong vision of what it is striving for, based on core values, effective leadership, a comprehensive strategy, appropriate internal systems, competent staff etc.

To relate: An effective organisation needs to have positive (helpful) external relationships with other organisations and institutions – it needs to be able to relate (including networking, advocating, lobbying, and facilitating change processes).

Explain examples of different areas of capacity building:

Capacity building within specific themes/technical areas:

- Child and human rights
- Child protection methods and policy
- Education methods and policy
- Health methods and policy
- Gender and Gender based Violence
- Advocacy & policy influencing skills
- Rights-based approaches (RBA)

Components of organisational development:

- Leadership & management
- Child rights programming
- Facilitation skills development
- Networking and constituency building
- Strategic Thinking & Strategic planning
- Internal and external communication
- Financial administration and management
- Planning, monitoring and evaluation, documentation/reporting
- Fundraising
- Accountability & Quality Management
- Admin & Logistics
- HR systems & performance management

Ask participants to go into organisational groups to discuss and agree on the following:

Strengths & Weaknesses

In your groups, discuss:

- What are the technical capacity needs of the partners?
- What are the organisational capacity needs of the partners?

Please make suggestions to capacity building issues to be considered in 20xx Capacity Development plan for each organisation. Be specific and refer to the organisation in question if it is not general.

If you have time, a good idea is to draft the new or revised capacity development plan in plenary as it allows you to start prioritising.

11. Workshop Closure - Wrap Up and Action Planning

You can decide to wrap up the workshop in a number of ways. It is however important to reflect on what we managed to do during the two-day workshop (or more).

What did we manage to do?
Allow all participants to brainstorm in plenary on what we managed to do. Note it on a flipchart as ideas come up.

What is left to do?
During the workshop, we might have noted issues not solved or to be confirmed. State these pending issues in a table with timeframe and responsibility, so we are all in agreement. Ensure

that you define roles & responsibilities in terms of finalizing these issues; who does what? The action plan could look like this, but specific names/responsibilities should be included:

Action Plan

What?	***Who?***	***When?***
Workshop report – partnership review	Facilitator	10th Dec
Dissemination of report to partner	Focal point	15th Dec
Finalize repeating the organisational assessment	Partnership officer	17th Dec
Draft the annual work plan, budget and capacity building plan	Programme Manager & Partner head	17th Dec
Finalise and sign addendum/new annexes to Partnership Agreement	PM & CD	9th Jan

Evaluation of the workshop

The evaluation can be done in many ways. If you have less time, you can do it in plenary ensuring that participants comment on all the four areas of:

- Content of the workshop
- Facilitation of the process
- Participation of participants
- Logistics, i.e. hall, food, toilet facilities

If you do evaluation in plenary, remember to note down the points from participants.

You can also develop a questionnaire in advance for everybody to fill out. It is important to note that people should be specific as to the reasons for their opinions to ensure that you can learn and improve from it. There are several other ways to do evaluations, i.e. group work, using smiley's or sad faces on specific statements referring to the workshop. If you need even further feedback on the specific exercises, you could also develop a table asking participants to rate the usefulness of each exercise.

12. Documenting the Partnership Review for learning

The partnership review workshop needs to be well documented; therefore your task is not finished at the end of the workshop. You need to ensure that inputs made by both partners are utilized for learning and inputted into the new/revised partnership agreement or addendum and further processes with partners.

The facilitator therefore needs to develop a comprehensive report covering all aspects of the process including the inputs given during the group work, whether noted on flipcharts or

drafting paper. The report should include analysis of the process and recommendations to Programme team and partners. The report should be shared with the Programme Manager and Adviser, the Programme team and the Partner. Additional recipients like other INGOs working in partnership with the same partner could be included; however this needs to be agreed by the partners.

It is a good idea to document best practices; lessons learnt etc. separately and share it widely in the organisation and among partners to ensure wider organisational learning.

References

Save the Children, Sierra Leone:	Partnership & Civil Society Development Strategy, Sierra Leone, revised December 2011 & related tools
Olive OD & Training (now Footsteps):	Olive Publications; Ideas for a Change 7a & 7b, Developmental Partnerships, 2000

Annex 1: Suggested 2-day Programme

Objectives

1. To work with the tensions that emerge in the process of the partnership (the extent to which partners' voices are heard and honoured, and the mutual capacity building that results);
2. To review how we are delivering on quality product (the developmental outcome or community-felt impact);
3. Review the extent to which interventions and the strategy of partnerships are both **empowering** and **efficient;**
4. To plan for the change we want to see in 2012 and plan for the mechanisms/processes necessary for that change.

Participants:

All key staff of partner organisation

Board member representatives of partner organisation

Programme Staff (Manager, officers and some APOs) of Save the Children

Finance Senior Officer of Save the Children at specific sessions

Programme Adviser & District Manager of Save the Children

Representatives of other INGOs working in partnership with the organisation

Facilitator: Partnership & Civil Society Development Officer

Time	Activity	Methodology	Responsible
	Day 1		
9.00-10.00	**Welcome & Introduction** ▪ Welcome ▪ Self-introduction ▪ Objectives & expectations ▪ Team building exercise	 Speech Individual Presentation Game	 CD, POM or PM Facilitator
10.00-10.15	Tea-break		Admin
10.15-10.45	**Partnership Agreement & commitments**	Presentation of current partnership agreements & commitments	PMs
10.45-12.30	**Where is the Partnership – a status** ▪ Status of the commitments ▪ Good practice ▪ Outstanding commitments ▪ Any changes to the partnership agreement in terms of ways of working (relationships, communication, Joint monitoring, feedback, reporting,	Organisational discussions Proposals Plenary discussions	Facilitator

	cooperation, capacity building)		
12.30-13.30	Lunch		Admin
13.30-16.30	**Where is the implementation of the projects?** ▪ Achievements ▪ Outstanding activities ▪ Quality of the implemented activities ▪ Challenges ▪ Lessons learnt	Organisational groups Gallery walk Synthesis in plenary	Facilitator
	Day 2		
9.00-9.30	**Recap from Day 1** ▪ Team building exercise	Plenary	Facilitator
9.30-10.00	**Financial Management & reporting** ▪ Status of reporting 2011 ▪ Outstanding reporting	Presentation	Finance
10.00-10.15	**Tea-break**		Admin
10.15-12.00	**Financial Management & reporting contd.** ▪ Challenges/issues ▪ Exercises	Organisational groups & plenary	Finance
12.00-13.00	**Narrative reporting** ▪ Status of reporting 2011 ▪ Strengths and weaknesses around the reporting ▪ Presentation of suggested formats	Plenary discussion Presentation	PM
13.00-14.00	Lunch		Admin
14.00-16.30	**Working with Tensions** ▪ Tension analysis of the partnership ▪ Solution scenario	Group work Plenary discussions	Facilitator
	Day 3		
9.00-9.30	**Recap from Day 2** ▪ Team building exercise	Brainstorm	Facilitator
9.30-12.00 (including tea-break)	**Project proposals & budgets 2012** ▪ Discussion on proposed partners' role in 20xx ▪ Monitoring frameworks	Presentation Handouts Group work	PMs
12.00-13.00	**Technical & Organizational Capacity** ▪ Capacity building framework ▪ Strengths & weaknesses ▪ Capacity building plan 20xx	Presentation Organisational groups Plenary	Facilitator
13.00-14.00	**Lunch**		Admin
14.00-14.30	**Where do we go from here? – action plan** ▪ Outstanding activities and reporting ▪ Revision of Partnership Agreement for 20xx ▪ Activity plans & budgets	Plenary	Facilitator, PMs
14.30	**Evaluation & Closing** ▪ Evaluation of workshop ▪ Closing remarks	Plenary discussion	Facilitator Heads of partners

Annex 2: Types of Partnerships

Sub-Contract

2 organisations sign a contract

One pays for the services of the other

Helps meet the objectives of the contracting org.

Direct Funding

Grants provided to an organization for it to design, implement, monitor and manage their own project.

One party is more dependent on the other.

Very little shared control

Developmental Partnership

Or

Rights-based Partnership

2 Organisations or more come together to design, implement, monitor, evaluate and manage a project or programme.

Partners pool resources based on strengths

Learning & development is key

High degree of mutuality, accountability and interdependence

Focus on learning & development

Consortium

Issue-based

3 or more organizations join to implement a project

Each organization has a different role and adds different value

Network/

Coalition

Formal or informal affiliation of member organizations

Organisations share information and experience

Collective Interest

Individual Action