We open eyes.

cbm
christian blind mission

Lessons learned from implementation of our Partnership process in CBM

Learning session II: partnership monitoring & mutual accountability, partnership review, and responsible partnership exit

Recording: https://web.microsoftstream.com/video/f7a1a3dc-e845-4ca3-b3af-47d29b6ff976

Quick Facts

Countries: Global

Date of Commentary: March 2021

Key words: Quick Process Reference Guide, Partnership

Purpose and scope of this lessons learned summary

Two online sessions on the QPRG for Partnership – assessment, approval, management and exit took place on 25th February and 11th March 2021. The objectives of the sessions were as follows:

- Enhance knowledge on how the revised partnership process works
- Increase competences in partnership portfolio management
- Exchange learnings from experiences of peers / other users

The session on 11th March focused on the last three phases of the process: partnership monitoring & mutual accountability, partnership review and responsible exit.

Eugenie Mukantagwera - Country Director Rwanda, Achille-Chongwa Njinimbot & Clifton Allela - Compliance Managers and Pedro Ponce – Team Leader Central and South America, presented their experiences and learnings. A Q&A and break-out session followed the presentations. The session was facilitated by Programmes Standards & Quality.

This summary outlines the learnings shared by presenters in session II. It also includes participants' contributions and key discussion points from the break-out sessions.

Presentations and discussion

The objectives of partnership monitoring & mutual accountability include but are not limited to building strong and long-term collaborations, strengthening organisational and programmatic performance, ensuring compliance with government and donor requirements, strengthening synergies and mutual benefits of the collaboration.

Keep in touch with partners: Regular communication with the partner (by phone and meetings) to identify critical issues and provide support is important. Annual partner meeting in a rotating location (e.g. each year a different partner organises the meeting), enables field visits and exchange of learnings between partners. Monthly joint calls, particularly during COVID 19 as partners face similar challenges, supports exchange of learnings.

Resources for PA action plan implementation: financial support and technical expertise can be provided, when needed. Resources should be aligned with CBM expectations. Funding can be included in the CO budget. Reallocation or reutilisation of funds can be used, in agreement with donors. Some activities can be included in new MYPs. When the partner lacks expertise (e.g. safeguarding), support can be provided by the CO or a CBM expert.

Monitor implementation of the PA action plan: the frequency of the PA action plan review can be incorporated into the project monitoring visits. Joint monitoring visits (programme, finance and advisor) enable synergies, allow to address discrepancies and to support the partner in addressing this. For example, monitoring is often focused on the project side (e.g. PPR or logframe). Consideration of the organisational level enables to identify underlying challenges. For example, a good PPR does not mean that e.g. the procurement process is adequately implemented.

Challenges to process implementation: Limited interaction with partner's Board members and limited CO resources to support the partner poses a challenge. Focus on project implementation and lack of tools for capacity development pose an additional challenge. In addition, capacity development of partners might go beyond the duration of the project implementation. When planning activities, consider the different facets of capacity e.g. does the CO have sufficient resources (incl. time) and expertise? Does staff have the know how to transfer knowledge?

Decision to exit: Exit is a decision. It can happen because the partnership has lasted long enough, and capacities are in place. Exit can take place due to a change in strategy or critical issues arising during the partnership (e.g. poor performance, noncompliance etc). Depending on the reasons for exit/situation, the exit process can take 1-2 years. However, one should not limit oneself to a specific timeframe. End of CBM funding does not mean end of the collaboration with a partner.

Key steps in an exit process: Exit can happen at partnership, project and/or country level. Depending on the level different actions are required. *Announcement* of the decision within CBM and to the partner is a key step. Communication with the partner should explain the nature of the decision and what it means to the partner. *Design of the exit* process allows to identify areas where the partner requires additional support. It is then important to *negotiate* with the resource mobilisation teams to secure funding for the *implementation* of the exit plan.

Main components of exit plans: Additional support needs can be provided through activities, workshops, expertise, introductions and connections to other donors and partner. It is important to document good practices and experiences from the partner and share this with other organisations. Consolidating organisational capacity (often linked to staff costs) and system strengthening (consolidating relationships with government institutions etc) are also key steps.

Lessons Learned

Key lessons-learned from participants and discussion points from break-out sessions:

- In some cases, partner organisations can be as strong as CBM. They just lack understanding of our standards, policies and rules. Keep this in mind to maximize on both potentials and build mutually beneficial partnership in such circumstances.

- Prospects for sustainability are strongly interrelated with effective participatory approaches, and ownership of project design by partners and communities.

- Partners have different needs. There should be a differentiated approach for partners according to their capacity needs. Specific support should be provided to partners with bigger capacity gaps.

- Discussion on sustainability and exit should be embedded in the entire project cycle. Sustainability is a process (not an event) and it should be part of the communication with the partner from the beginning of the project throughout implementation. The Project design Form is the place where sustainability requirements need to be identified and related activities be included in the Project Plan.

- A mutual understanding of sustainability should be ensured. Partnership/project work should be focused on growth of partners capacities. This includes, liaising with other donors and stakeholders to strengthen capacities.

- Monitoring of the Partner Assessment (PA) Action plan should be part of the monitoring visit agenda. Encourage the partner to report on the action plan implementation. This will enable identification of challenges. The plan should be regularly reviewed and adapted to the partner's capacities and development. Make sure the partner submits an updated PA Action Plan (and risk register) together with the 6 monthly narrative report, as required by our project reporting process.

- Partnerships are subject to changing focus, reorientation, and priorities. They are not time-bound. They should continue as long as they are mutually beneficial.

- Sustainability needs to be considered in the context of the partners' systems/organization. There are different moments in iPCM phases (key points in time), as well as partner processes, where sustainability and exit should be thematized and discussed.

- Involve and engage government institutions. Engage with other partners and seek synergies between their work. This will also contribute to the long-term sustainability of partners.

- Local wisdom in communities if often a rich source to ensure partner organisations can become more sustainable in the interest of responsible exit.

- (Different) understanding of sustainability can be reflected in project plans and budgets i.e. budgeting of large parts of the partner staff does not contribute to sustainability. Partners might require widening of activities/mandate to stand on their own feet or move under government or insurance schemes as service provide, even if this will result in reduced levels of independence.

- Before exit, consider the sustainability of the partner as some partners are heavily reliant on CBM's funding and support. Find ways to collaborate with the partner after the partnership is exited.

- In the case of mismanagement of funds, discuss with the partner the implications of their actions and send the partner a letter for immediate termination listing the reasons for termination.

- Before the exit, consider the contractual obligations and guidelines to avoid future statutory and legal battles. Discuss on the way forward with regards to bank balances, guidelines to handover of assets and any unsettled payments.

- Communicate with other stakeholders with linkage to the project concerning the partnership exit.

Note: The learning paper will be expanded as additional learnings become available. If you have learnings you want to share, please contact Margarida Silva, Programme Standards and Quality (PSQ).