

We open eyes.

Lessons learned from implementation of our Partnership process in CBM

Learning session I: partner identification & review, partner assessment & action plan, and partnership approval & agreements

Recording: <https://web.microsoftstream.com/video/2e33abff-6078-49de-ace4-8791a08fba0b>

Quick Facts

Countries: Global

Date of Commentary: February 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 25th February focused on the first three phases of the process: partner identification & review, partner assessment & action plan, and partnership approval & agreements.

Deborah Tigere - Country Director Zimbabwe, Achille-Chongwa Njinimbot & Clifton Allela - Compliance Managers 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 I. It also includes participants' contributions and key discussion points from the break-out sessions.

Presentations and discussion

The implementation of the QPRG for Partnership must be understood in the context of the CBM Partnership principles. The QPRG enables gathering of information, to support informed decision-making. How the process is implemented will impact the development of the partnership.

Identification of new partnerships: There is increasing competition in the sector. New partnerships will enable pursuit of new opportunities and support portfolio growth. New partners can be identified through a stakeholder mapping, referral or networks. New partnerships will also help avoiding partner overload as the portfolio grows. Partner overload can reduce project efficiency and increase risks.

Review of partnerships: Some long-term partnerships no longer align with CBM priorities or are not working. These should be exited. Exit takes time but investing in partnerships that do not work also takes resources. Developing new partnerships and phasing out long-term partnerships can create tensions. Conduct a risk analysis and prepare for the transition phase.

Attractiveness of CBM as partner: A stakeholder & risk analysis can help to place CBM as an attractive partner. Organisations look for mutual understanding and respect in partnerships. CBM partnership principles should be promoted and organisations that are aligned with our Initiative priorities and minimum standards should be approached. Identify new partners that enable growth of the organisation. Partner assessments can be conducted in preparation for future opportunities.

Preparing the partner assessment: Communicate the objectives and process of the assessment. This is important to prepare the partner, reduce uncertainty, and ensure that the PA is meaningful. Sharing the tool with the partner ahead of the meeting saves time. It allows the partner to prepare supporting documents and feedback. The meeting can then be a more interactive discussion on

feedback, follow-up questions etc. For example, a discussion on organisational strengths & weaknesses and how to capitalise on this. Preparation of CBM team for the assessment is key.

Mutual feedback: The partner assessment is an opportunity for mutual feedback. The partner needs to be provided with opportunities to ask questions and provide feedback on identified gaps, as well as the assessment process. Mutual feedback is particularly important during the development of the PA action plan, to ensure a realistic timeframe for implementation. Finalised documentation should be uploaded onto the system to be readily available when required.

Shifting from project to organisation mindset: The partner assessment gathers a holistic view of the organisations and enable and overall understanding of its capacities. This is particularly relevant when discussing new opportunities and adding new projects to the partner portfolio, as well as when making decisions on the partnership. Monitoring visits also need to take this into consideration. The PA Action Plan should be regularly monitored with the partner.

Sharing of capabilities between offices: There is room for improvement in collaboration within the CBM. Some country offices and regional hubs have knowledge and expertise in assessments for specific situations e.g. humanitarian projects. Knowledge sharing between offices and support from neighbouring countries should also be considered when appropriate.

Budgeting for partnership development: Partnership development is a low cost activity. It is not something that it is budget for but there is also some budget lines that provide flexibility, such as capacity development of partners and meeting attendance. Stakeholder mapping can be done by the CO in the context of its work. Key is relationship building. There needs to be clarity and transparency in partnership development.

Contractual, implementing and Institutional partners: This is linked to the shift from project to organisation mindset. By focusing only on the implementing partners an opportunity to discuss with the contractual partner (e.g. diocese) organisational systems is missed. It might be difficult to also involve central administration of the institution, if challenges during implementation arise. Contractual partners and implementing partners should be involved in the partner assessment.

Assessing sub-partners: It is recommended to also assess sub-partner. For example, if safeguarding concerns arise during project implementation, this will also impact on CBM. A question in the PA relates to capacities of the partner to manage sub-partners. If it is decided to assess sub-partners, the PA tool should be used. Assessing sub-partner is also an opportunity to identify new opportunities for work and potential new partnerships.

Lessons Learned

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

- Demystify the partner assessment as a compliance step. Emphasize mutual benefits when engaging with partners. How the PA process is managed impacts ownership of the findings and recommendations especially at partner level.
- Partners' ownership is key to a smooth and effective assessment process.

- Timely and clear communication of the objectives of the partner assessment and its aim to strengthen the partner capacities, instead of identifying problems.
- Elaborate clear Terms of Reference with input from relevant stakeholders (advisors, resource mobilization teams, etc.) and share them with the partner.
- Sustainability is a key component of the partner assessment. Clearly discuss with the partner about sustainability during the partner assessment and partnership monitoring.
- Involve the team of competence from the partner in discussions about sustainability. Share examples and discuss sustainability strategies with the partner:
 - Long term focus
 - Funding Stream Diversification
 - Business plan
 - Income generation
- The assessment team shall include a balanced set of skills: programme, financial and advisory.
- Ensure that sustainability actions agreed on with the partner are included in the PA action plan and followed up:
 - Linkage between the PA and PPA (project design), where the PPA requires major findings of the PPA which could affect the project delivery to be mentioned.
 - Linkage with the Annual Narrative Report template, which includes a section that requires the COs to include updated PA Action Plans.
- When conducting assessment with institutions, such as diocese, government departments, universities etc, it is important to clarify autonomy level of departments (or hospital unit) and how the department or unit is linked to the central administration of the institution.
- Periodic Risk Assessment should be a continuous exercise for both existing and new partners even after the partner assessment is completed.

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).