Fauna & Flora

Partnership checklist: issues to consider when developing a joint project[1]

All organisational relationships need effective management, regardless of the type or length of the relationship. Stronger relationships are more effective, more likely to have an impact on the ground, and are also better able to withstand crises.

Why, when and how to use this checklist

How organisations will work together is important to consider, but it is often overlooked during project design and delivery. By considering this issue early, many challenges to joint working can be avoided or overcome more easily, and project delivery will be more effective.

The focus of this checklist is on the issues and processes related to joint working rather than on wider project issues and processes. The checklist uses an organisational relationship lifecycle framework to explore these issues. Every relationship is different, but the stages of this lifecycle show up in some way in most organisational relationships.

This checklist is intended to be used at the beginning of joint work to ensure that essential partnership issues are considered. It should be of use to any organisation that works, or is planning to work, with other organisations. It can also be used as a reminder of key issues to consider when preparing a Memorandum of Understanding (MoU) or similar agreement, or when the relationship is reviewed.

It is useful to consider all the points below, across lifecycle, when first establishing a relationship or when organisations that already work together develop a new project. Common sense is required to judge the time needed to consider each issue, depending on the individuals and organisations concerned and the situation in which they are working.

Identifying

- Is the decision to work with this/these organisation(s) based on adequate knowledge and consideration of all potential collaborators?
    - *For example, what other organisations work in the area/sector, why is this the most appropriate organisation to work with at this time and on this project?*
- Is the project within the mandate of all organisations? If not, is the rationale for engagement sufficiently justifiable?

- o *For example, there may be strategic or ethical reasons for an organisation to work on an issue not directly within its mandate.*
- Do potential partners have the necessary skills, or the means to build or access them (for example, by contracting in expertise for example), and a good reputation or track record?
- Have the benefits and costs of working jointly been fully considered?
  - o *For example, benefits include the capacity to deliver on a larger scale and securing or developing additional skills or resources, and costs may include more extensive consultation and decision-making processes.*
- Are there any risks in working in partnership with this/these organisation(s)?
  - o *For example, loss of autonomy or reputation, shift in focus of either organisation.*

Building

- Do all partners share a good understanding of the context and issues being addressed, and appreciate the mandate and values of other organisations within the partnership?
  - o *This is particularly important where organisations are working with those from other sectors.*
- Are the aim and objectives of the partnership defined and agreed?
- Has an implementation plan been agreed?
- Have partners identified and found ways to mobilise the resources needed?
- Are the roles and responsibilities of each organisation clearly defined and agreed?
  - o *This could include, for example: employment and/or management of staff; financial management and reporting; project management and reporting; day to day administrative tasks. This list is not exhaustive; other issues may also be relevant depending on the organisations and the project on which they are working.*
- Are the expectations of each organisation clear and realistic?
- Does each partner have the necessary skills and resources to enable them to fulfil their roles and responsibilities effectively? If not, have strategies been developed to address these skills and resource gaps?
- Have time and resources been budgeted for partnership management?
  - o *This includes, for example, regular meetings and communication.*
- Has the partnership agreed how to present itself (for example, individually, as collaborating organisations, or as a partnership) to various stakeholders (community members, local government institutions, donors, NGOs etc) that have an interest in the work?
- Has a MoU or other relevant form of agreement been prepared, and signed by all partners?

Managing and maintaining

- Is the structure and processes of the partnership appropriate?

- o *For example, is the decision-making process timely, equitable and transparent? Is the management structure appropriate? Is there a process for resolving conflicts?*
- Do the partners communicate at appropriate times (not too little and not too often) and in appropriate ways (face to face meetings, online meetings telephone, email)?
- Are meetings managed well (focused, appropriate and interesting) and documented as appropriate?
- Are issues requiring resolution dealt with promptly?
- Are all organisations sharing and learning from each others successes and mistakes?

Reviewing

- Has a time period been agreed after which the partnership will be reviewed?
  - o *This will help to ensure that all organisations are fulfilling their obligations, that expectations are being met, and that the partnership is delivering effectively.*
- Is the partnership achieving its objectives? To what degree are the outcomes sustainable? Has a method been devised by which to monitor and measure the effectiveness of the partnership and its activities?
  - o *An assessment of the partnership could be built into project or programme reviews and evaluations.*

Revising and renegotiating

During the course of the relationship, particularly following a review, the structure or processes of the partnership may need to be revised. If so, it will be useful to reconsider the points outlined in this checklist.

Exiting

- Has the lifespan of the partnership been agreed? Is it linked to or likely to extend beyond a specific project or funding period?
- Have the circumstances under which the relationship may be ended prematurely been agreed and outlined in the MoU?
  - o *This could, for example, include changes in the wider environment (for example, new legislation, political issues, economic issues), resolution of the key issue the partnership was addressing, changes in funding, unfulfilled obligations, poor accountability and reporting.*
- Has a minimum notice period been agreed?
- Has ownership of any jointly held assets (including intellectual property) been agreed?

Fauna & Flora Fauna & Flora is an international wildlife conservation charity. We work closely with conservation partners in well over 40 countries to save nature, together. Our focus is on protecting and restoring habitats, saving species from extinction and developing sustainable livelihoods for those living closest to nature.