TOOL 7

Tool 7: Partnership healthcheck

USE
To review the 'health' of the partnership, determining areas for discussion and improvement

PARTNERING PHASE
Implementation

Monitoring the health and efficiency of the partnership's setup, operation and processes, ensuring the building blocks of partnerships are in place, is essential to optimise partnership impact.

Parts of the framework can be used informally and regularly – for example every few months – as a prompt for discussion in partner meetings to help keep the partnership on track.

Below is the description for a more formal review workshop that could be held every six months or annually. Where there are many partners, or where there are significant issues raised, an external facilitator should be used.

1

Review workshop: preparation

Ask all partners to complete the checklist below, providing their opinion on where the partnership sits relative to each aspect of good practice in partnering: Green – no concerns; Amber – some concerns; Red – serious concern

Analyse the results to prioritise the areas for discussion at the workshop.

2

At the review workshop

Agree 'ground rules' to encourage openness and participation, making it clear that the review is not about judgment or blame, but a positive opportunity to bring up issues, learn together and improve the partnership;

Present the checklist analysis, jointly talk through each partnering aspect and the positive experiences or the challenges partners may have around it;

Aim to fully understand and appreciate your cross-organisational perspectives or other sources of diversity;

Talk through how each aspect of partnering could be either further enhanced or meaningfully improved to the satisfaction of all partners, and prioritize;

Determine what actions should be undertaken, by whom (wherever possible by more than one partner) and by when.

3

Post review workshop

Undertake the agreed actions, conferring with partners, keeping all informed on progress;

Confirm with partners that the aspects have improved.

Partnership health indicators

1. FUNDAMENTALS			
There is a compelling shared vision, mission and objectives fully bought-into by all partners	●	●	●
Partnership has clearly identified collaborative advantages, is able to create added value, deliver more than the sum of its parts	●	●	●
The partnership has been set up to, and is delivering, net value to all partners	●	●	●
Partners are sufficiently empowered and enabled to be able to contribute to the partnership;	●	●	●
The partnership is able to include all key stakeholders holding essential resources	●	●	●
The partnership has been set up to deliver net value to all partners	●	●	●
2. PARTNERSHIP RELATIONSHIP			
Partners are demonstrating collective leadership of the partnership	●	●	●
Partners are transparent about their assumptions, goals, needs, drivers and constraints	●	●	●
There is a high level of trust among the partners	●	●	●
Partners are empowered and there is clear equity and balance among the partners in decision-making	●	●	●
Partners are accountable to each other for delivering on their commitments	●	●	●
Challenges, problems and tensions are openly brought up and dealt with respectfully and collectively	●	●	●
Partners are jointly accountable for partnership delivery and will help out other partners to deliver	●	●	●
3. STRUCTURING AND SET-UP			
The partnering agreement clearly sets out the fundamentals of the partnership (including the vision and objectives, why each partner is involved, the intended value creation, overall approach; commitments, resources, roles and responsibilities of each partner)	●	●	●
There is a clear theory of change (or theory of transformation) for the partnership, along with a measurement framework to be able to demonstrate progress and success	●	●	●
The fiduciary / legal structure for the partnership is fit for purpose	●	●	●
The governance structure for the partnership is fit for purpose	●	●	●
The management structure for the partnership is fit for purpose	●	●	●
RESOURCES			
External (non-partner) individuals are supporting / championing the partnership	●	●	●
Personnel are available	●	●	●
Finance is available	●	●	●
Knowledge and data are available	●	●	●

RESOURCES continued			
Important networks or spheres of influence are leveraged	●	●	●
Partnership facilitation / troubleshooting / brokering is available	●	●	●
Other necessary resources are available	●	●	●
4. MANAGEMENT			
Iterative approach to project management, focused on value creation	●	●	●
All relevant partner resources are being applied	●	●	●
Communication of all kinds is sufficiently frequent	●	●	●
Roles and responsibilities are always clear	●	●	●
Deliverables and timeframes are always clear	●	●	●
Financial management, including process for receiving/distributing funding, is effective	●	●	●
Information sharing is effective	●	●	●
The partnership vision remains compelling and relevant to the context	●	●	●
The partnership iterates and adjusts its approach based on experiences to date	●	●	●
The partnership is, or is on course, to itself becoming sustainable or delivering sustainable outcomes	●	●	●
Cultural differences between organisations are well managed and clashes avoided where possible	●	●	●
Partners remain fully committed to the partnership	●	●	●
The partnership has been institutionalized into each partner organisation (e.g. engaged key staff, built into organisational planning and budgets etc.)	●	●	●
MEETINGS AND WORK PROCESSES			
Meetings happen with appropriate frequency	●	●	●
Setting of agendas and arrangement of meeting logistics ensures inclusivity of all partners	●	●	●
Meetings are documented appropriately and minutes circulated	●	●	●
Conflicts of interest are effectively managed	●	●	●
Partners are consistently present at meetings and represented by appropriately senior level	●	●	●
Decisions are made in a timely and efficient way	●	●	●
5. BROADER CONTEXT / ENABLING ENVIRONMENT			
Partners have reviewed and strengthened their organisational capacity to partner	●	●	●
The partnership is connected to similar partnerships and peer learning / influencing takes place	●	●	●
The partnership receives ongoing support from platforms and other mechanisms, as required	●	●	●
The partners, and the partnership, advocate for more collaborative approaches to the SDGs	●	●	●