

# PARTNERSHIP ANALYSIS

## ⌚ Purpose

The purpose of a partnership analysis is to qualify a joint analysis of stakeholders in a partnership, to be able to decide what is needed to strengthen the partnership and the two or more CSOs involved in it respectively.

## Use and description

Focus in a partnership analysis for both parties is to gain an overview of your own organisation, the partner's organisation and the content of the partnership. The analysis should inspire CSOs in the North and South to:

- Form an overview of and discuss a common vision, interests and strategies
- Reconcile expectations and discuss mutual contributions
- Clarify role division and delegation of accountability
- Be aware of mutual influence

We understand partnership as collaboration between two or more CSOs, who help each to perform specific activities and to develop each other's competencies and strengths as CSOs, based on a common, negotiated basis.

Experience has proven that strong partnerships are a good precondition for working towards realising the visions CSOs may have. Good partnerships between the South and North are also a necessary foundation to address the global challenges we currently face.

## ⌚ Time

Working with partnership analyses requires thorough planning, preparation and follow-up from all the parties involved. The actual analysis can take from one day to two weeks, depending on how thorough the parties want to be when working with it.

## Resources

Working on a partnership analysis is resource-intensive. The analysis requires that the parties meet and discuss, mutually challenge and learn from each other. The budget will depend on the organisations and how thoroughly the analysis is to be performed.

Depending on the specific context and partnership, the work of running a partnership analysis can be included in a project or partnership activity, for which a funding application can be made to the Civil Society Fund.

## Procedure

The tools used for a partnership analysis represent a cohesive procedure. We recommend going through the various exercises and steps systematically. If it is not possible to go through all the steps, the most relevant can be chosen, and discussed within the partnership in the course of a shorter period of activity.

The analysis can be used at the start of new partnerships and when entering into new types of collaboration/projects, and in the consolidation and maturity phases of any partnership.

### Step 1. Partnership seminar

The starting point for working with a partnership analysis is a meeting between two partners who have expressed interest in working on the development of their organisations.

The first step is to draft a programme, compile a budget and ensure the necessary resources, agree the physical venue for a seminar, invite the correct participants, develop materials and so on. In this slightly technical part of the process, it is important that both organisations take ownership, and that there is clear agreement on work to be done and mutual expectations.

### Step 2. Drafting a programme for a partnership seminar

When you are working with a partnership analysis, it is important to select the right tools and analyses, and that both organisations can present their input. We will use a "standard" programme below. As is the case for the other tools in this guide, the programme and analyses you choose must be adapted to your organisations and context.

A programme can contain the following elements:

- Presentation of different types of partnerships
- The value-based partnership, based on common values, for example a

religious or political movement.

- The specialist partnership, based on a common specialist theme, for example sustainable energy, health or education.
- Partnership as part of an international organisation. A collaboration in which the Danish organisation and a local organisation are part of an international network, such as an international fatherhood organisation.
- Allies, when the specialist or political standpoint is the common denominator.

- Discussion of strengths and challenges in various types of partnerships
- Discussion on your own partnership – what type is it, and what strengths and challenges can it give?

From here, the following steps can be taken.

### **Step 3. Clarification of mutual values and vision**

Clarification of the mutual values and visions a partnership is based on can lay the foundations for a long-term and respectful partnership. The intention is not that desires, values and vision should be the same, but hopefully, they can mutually support each other, such that the foundation for the partnership is mutual interest and a desire for change shared between the organisations.

Depending on the number of participants, the objectives, values and visions of the organisations and partnership respectively can be described in plenum or groups. You can draw inspiration from the following questions:

- Where do you want to go?
- What values are you applying independently and jointly?
- What is your common vision – in the short and long term?

A schematic illustration will help define what belongs to each organisation, and what you have in common within your partnership.

### **Step 4. Clarification of expectations for the partnership**

A mutual clarification of expectations is essential for a successful partnership. The clearer we are about what our partner can expect of us, and what we expect of our partner, the better. Clarification of expectations and reconciliation are essential with regard to preventing or limiting the risk of conflict within the partnership. Holding regular expectation reconciliations is a good idea, and remember clear communication with your partner if the organisation temporarily cannot live up to the expectations agreed.

When discussing expectations, use the following questions for inspiration:

- What are your expectations with regard to: Communication, reporting, obtaining funding, monitoring and evaluation, planning and implementation of activities, development of the partnership over time, joint advocacy campaigns etc.?

You can use the form below for inspiration if it can help you with the process and partnership moving forward. Use it to determine expectations and to reach a decision on the grounds you choose to work on.

### **Step 5. Clarification of mutual contributions to the partnership**

Mutual contributions to the partnership are becoming more important, as indicated by the first two chapters of this guide. 'Mutual contribution' means what each organisation will put into the partnership. To make contributions visible, transparency around what each CSO contributes is important.

When discussing mutual contributions, you could look at what each organisation can and has the capacity to do, and then discuss what that will bring to the partnership.

### **Step 6. Allocation of roles and tasks**

There are clear guidelines pertaining to North-South partnerships which define the roles each organisation must have. For example, a Danish partner cannot engage in direct implementation without the involvement of a local partner. Clarity concerning roles and tasks is a necessity for a healthy and stable partnership. Some roles and tasks can be agreed ad hoc, whilst others are dictated by the

partnership and the two organisations involved.

In the course of a partnership analysis, it can be a good idea to take a close look at the various tasks that have to be performed during the course of the partnership, and pinpoint who is responsible for each task and what it will involve. You can use the form below for inspiration for this process.

When discussing roles, it is important that the two organisations mutually respect each other's ability to independently plan and execute their work within the framework of common understanding.

### Step 7. Cataloguing knowledge and mutual influence

A partnership analysis of the type described above generates a lot of different knowledge which can be used moving forward. An important point about partnership analyses is that partnership also makes demands of the organisations themselves. That means that some roles and tasks might require the organisation to find new capacity, or joint discussion of values and visions within a partnership can influence those of the partners.

Openness to such influence is important, along with accepting that CSOs develop partnerships and that we develop as a result of them.

Cataloguing knowledge can take many different forms. One option is to use a form such as the one below. In this instance, the inclusion of values, expectations and roles has been prioritised.

Cataloguing and drafting a plan for the rest of the process are important before the seminar is convened. We recommend setting up a follow-up committee for this purpose, with representatives from both or all the partners. They can carry on working on experiences, which can result in a partnership agreement, defining values, expectations and roles.

### Good advice

- Performing a partnership analysis requires that the organisations do not rush onwards and skip the reflection and decision-making phase. The analysis can indicate factors which should be changed in one or both organisations, and it is therefore important to respect the phases in organisational development. CSOs ought to carefully consider the requirements made of them for a partnership, and plot in a reflection and decision-making phase before making changes within their organisation which can have major ramifications moving forward.
- Experience indicates that the partnership analysis should last one or two days, depending on the level of familiarity, trust and experience between the partners. If the analysis is performed in a hurry, there will not be sufficient content in the process. Remember to prioritise the process. Everyone should be given the chance to express their views. Have the programme facilitated by an external consultant if at all possible. Ensure that someone takes minutes of the main points, and that there is clear agreement on what the next step for each organisation will be.
- The process is important. Sufficient time and resources must be allowed to clarify and reconcile values, expectations and roles. Realistically assess the resources of North and South with regard to personnel, time and money.
- Ownership to enter into a partnership analysis is a necessity for a good process. That ownership must be shared between the parties involved.
- In common with the other tools in this guide, representation in connection with a partnership analysis should take into account that there can be different stakeholders and perspectives in terms of sex, age, religion and so on.
- Repeating an analysis again after a few years can be recommended, to adjust and follow-up on the decisions made the first time around.

CSO A'S EXPECTATIONS OF	THE PARTNERSHIP	CSO B'S EXPECTATIONS OF
Development of the partnership...	We will jointly develop the partnership towards...	Development of the partnership...
Communication...	We will communicate by...	Communication...
Joint advocacy campaigns...	We will run joint advocacy campaigns focusing on...	Joint advocacy campaigns...

CSO A	THE PARTNERSHIP	CSO B
We will...	We will jointly...	We will...
Our core values are...	Our mutual core values are...	Our core values are...
Our vision is...	Our mutual vision is...	Our vision is...

CSO A'S CAPACITY	A'S CONTRIBUTION TO THE PARTNERSHIP	B'S CONTRIBUTION TO THE PARTNERSHIP	CSO B'S CAPACITY
Awareness of funding modalities...	Optimal utilisation of modalities	Local inclusion	High level of inclusion in the local community...
Awareness of the advocate organisation's work within disabled rights	Practical experience with rights access within the disabled field	Experience of communication with and involvement of the state	Experience with national advocacy campaigns...
...	...	...	...

**Note:**

- A position paper is available for download from CISU's web site on partnerships for inspiration.
- Examples of collaboration and partnership agreements are also available on the site, which can be used by organisations when drafting agreements covering a partnership
- Apart from the different reflections described above, a number of the other exercises and tools referred to in this guide can also be used when working with a partner. They can include a context analysis or an Octagon, which can be jointly used by both organisations, and the results compared and discussed.

	CSO A'S CONTRIBUTION	CSO B'S CONTRIBUTION
Values		
Expectations		
Roles		
...		

TASK/ROLE WITHIN THE PARTNERSHIP	PERSON RESPONSIBLE	DESCRIPTION OF TASK/ROLE
Monitoring and reporting	Project coordinator X	X's role is continuous monitoring of implementation of ... and reporting to... every three months
...	...	...
...	...	...