PARTNERSHIP IN PRACTICE

How to effectively care for and manage a partnership

Caring for a partnership with intentionality and self-awareness, as well as curiosity and respect for each other can help ensure that projects run smoothly, and that each partner's work has the greatest impact. Beyond projects, effective partnerships support mutual learning and growth, and opportunities for increased scale and more effective advocacy and networking. For each of the following stages of a partnership, here are some helpful tips and tools for both management and operations staff who want to manage a partnership effectively.

CRS CATHOLIC RELIEF SERVICES | Partnership & Capacity Strengthening

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PARTNERSHIP START-UP

There's no standardized way to start a partnership, but most successful ones plan from the start for the care needed to maintain it well. How you start a partnership sets the tone.

Key questions at partnership start-up:

- Why are the partners interested in working together?
- Who initiates the partnership?
- How are the terms of the partnership determined?
- Are there specific guidelines for the relationship as determined by the project or donor?

As a partnership is established, it's important to:

- Consider what type of partnership (functional, implementing or organizational) is being established.
- Consider what type of institution (non-profit secular or faith based, government, or for-profit/business) are you partnering with.
- Reflect on who you are as a representative of CRS, and who CRS is institutionally in this relationship and context.
- Spend time learning who your partner is, including understanding their values, work, priorities and incentives, as well as their history, leadership and structure.
- Discuss together what the partners will do and how to make sure their partnership is healthy and supported.
- Consider if there are additional donor or context specific requirements that might also impact partner roles and responsibilities. Sometimes donor requirements have enormous impact on how we want to manage our relationships.

Helpful tools and resources for this phase of partnership include:

- Sample Memorandum of Understanding
- Leadership Forum Terms of Reference
- Typology of Relationships
- Consortium Alignment Framework for Excellence (CAFE)
- Partnership and Capacity Strengthening Sample Job Description

FREQUENT CHECK-INS

Frequent interaction can help partners keep abreast of the other's work, priorities, concerns and successes. Talking, emailing, or meeting regularly helps build rapport between partners, and helps identify any problems before they grow too big. How often you talk with partners depends on the people, the work they are doing together and their organizational or cultural context. However, it is important for all partners to consider what regular communication would be best for all parties and establish the means to make it happen.

Key questions at this stage:

- When do you need to check-in?
- How do you conduct regular interactions?
- What tools support regular interaction?

To make the most of relationship check-ins:

- Explore and determine the appropriate means of communication for each partner and each partnership. Is it phone? In person? Email? Skype?
- Determine who at the partner organization you should be communicating with. Is it leader to leader? Program staff to program staff?
- Determine how regularly your organizations will connect. Monthly? Weekly? Daily?
- Keep at it. Making the time and keeping on track with check-ins is an important part of effective relationship management.

Helpful tools and resources for this phase of partnership include:

- Partnership Principles

REGULAR MEETINGS

Connecting on a regular basis helps partners care for the relationship. These periodic interactions are often more than a quick hello but less than a formal assessment of the partnership. They can be very helpful for addressing joint business and any emerging issues, and can help to deepen each other's knowledge of and appreciation for the other. This kind of interaction should happen on a timeline relative to the project or programming that the partners are undertaking together and will involve an actual meeting or scheduled event.

Key questions at this stage:

- What is the purpose of the meetings generally and the intention for each specific time together?
- When will it be best to hold regular meetings?
- Who should be at these meetings?
- Where will they happen?
- How are these meetings tied to the projects the partners are working on, and how can they include time to check-in on the partnership itself?

To ensure effective periodic interactions:

- Determine between partners what kind of interaction works best for everyone, e.g. regular meetings, formal visit, scheduled call, etc.
- Determine who is responsible for the interactions, and ensure that each person has the time and can commit to attend, lead and contribute to these interactions as agreed.
- Keep whatever commitments are made at and between the interactions.
- Safeguard time for relationship maintenance and not just project maintenance.
- Assess how the interactions are going and adjust as needed.

RELATIONSHIP MONITORING

As the partnership and its work deepens, more intentional and more formal monitoring and evaluation of the partnership can be helpful: to bring out any issues that have arisen but that partners may not feel comfortable speaking about directly or that regular meetings haven't allowed the space for, and/or to identify ways that partners can act to make a partnership even stronger. Monitoring and evaluation contribute to the partners ability to learn about the successes of their partnership in order to communicate the successes and lessons learned internally and externally, including to donors. More formally monitoring and evaluating a partnership can happen at any point. However, it is often most helpful when done on an annual basis.

Key questions at this stage:

- How often should and can partners commit to monitor and evaluate how their partnership is working?
- Who should lead this monitoring process from both parties?
- What tool will partners use to do this monitoring?
- What is the plan to follow up on any results from this monitoring?

To ensure effective partnership monitoring and evaluation:

- Be clear on why partners are interested in monitoring. Doing monitoring just to check a box will not yield significant results. However, doing it to strengthen a relationship and identify any areas for improvement can be very helpful.
- Be familiar with the tool the team plans to use, such as the CRS Partnership Scorecard. If you are not comfortable using the tool, get support from colleagues or the partnership and capacity strengthening team in how to apply it.
- Have a plan for how the results will be analyzed and responded to.
- Follow up. Be certain that issues emerging from a monitoring process are addressed, either through a formal reflection process or in other less formal interactions with the partner.

A key tool to help in this phase of partnership includes:

- Partnership Scorecard

DEEPER REFLECTION

More than daily check-ins, or monthly meetings, or even yearly partnership monitoring, deeper reflection happens when partners want to intentionally take time out to look closely at their relationship and evaluate how it's working and how it could be better. Formal reflection time can be used at the start-up phase of a partnership to explore more deeply each partner's identity, values and work, and can be a very helpful way of getting a partnership off to a good start. It can also be used later in a relationship to take a step back and look at the bigger picture of the relationship to see what's going well and what might be strengthened. Deeper reflection can also be done when a partnership is in trouble by taking structured time to listen to each other and problem solve together.

Key questions at this stage:

- Why are we doing this reflection at this time?
- How often should we do a reflection?
- How long and what form should the reflection take?
- Who should facilitate the reflection process?
- Are both partners committed to listening deeply to each other and investing in the relationship?

To ensure the reflection process is helpful to all partners:

- Be clear from the beginning the intent of the reflection. Is it just to get the partnership off to a good start? Is it to get a troubled partnership back on track?
- Secure an experienced facilitator. Sometimes it can be helpful to have a third party facilitate the reflection, particularly if the partnership is having challenges. No matter who facilitates though, it is critical that the person has adequate background on both partners, the history of their relationship, current issues both are experiencing, and is a skilled facilitator of similar processes.
- Plan in advance with country program leadership how the team will respond to the results of a reflection.
- Follow up. A good reflection will include significant time for action planning and next steps. Be sure that these items are not forgotten, and that the commitment to making the partnership work moves forward.

A key tool to help in this phase of partnership is:

- Partnership Reflection

ADDITIONAL NOTE: In every relationship, there are times when communication breaks down. When you feel like your partnership is in crisis, see the following guidance for some suggestions on getting back on track: Relationship Emergency!