Developing a CO Partnership Strategy

Below are some key steps which could be used to develop a CO Partnership Strategy, if workshop processes involving key staff is used. These steps could be conducted as a series of 2 to 3 workshops of 2-3 days each, with some related processes to develop shared understanding around 'technical' topics (Step 4).

Step 1	Collect material, plan workshops

Step 2	Capture CO experience to date

Step 3	Analyse contextual drivers

Step 4	Consider technical aspects

Step 5	Develop vision and areas of change

Step 6	Develop goal, objectives and framework

Step 7	Develop Action plan

Step 1	Collect material, plan workshops

This preparatory step involves:

- Reviewing material from earlier discussions and experiences about Partnership from the CO, eg discussions at QPMs/program meetings; lessons learned from key project initiatives etc

- Reviewing key organisational documents, eg CA Partnership Policy and Framework; CI guidance on partnership in emergencies; CI programming principles; Program Approach definitions and progress to date.

- Reviewing other contextual material, eg core donor's partnership requirements; government policies; sectoral scans of civil society and INGO activity

- Preparing some key topics or headings for the Strategy

- Planning the workshop/s – ie, how many workshops, who should participate, preparing session plans and materials.

- Clarify in advance who will be documenting outputs from the workshop/s and who will be preparing the draft Strategy.

> **Possible topics / headings for the Strategy:**
>
> - **Background,** current practice, lessons learned, contextual analysis
> - **Overview**, definition of partnership, principles, rationale
> - **Strategy**, Goal, objectives, monitoring
> - **Partnership framework,** Modalities
> - **Action plan**
> - **Annexes –** Planning Frameworks, Capacity building (if needed), Types of Partner organisations
>
> See also *CA Partnership Framework*

- Consider establishing a 'Core Team' of 2-3 people who will review material before and between workshops, and develop the Action Plan for the Strategy.

In addition, plan an **Overview Session** for Day 1 of the Workshop/s. This includes:

- Discussion about why partnership

- Overview of the structure of the Strategy

- Internalising the CA Definition of partnership. Depending on the group, it might be helpful to review other elements of the CA Partnership Policy, particularly Partnership Practice and Partnership Principles.

	Possible processes
Why partnership?	Plenary: - Link partnership to the CO program framework / LRSP, and CA Strategy 2015 - Why strengthen our work in Partnership? Brainstorm some ideas and cluster comments around headings / topics of the Strategy

	Possible processes
Partnership Strategy	• Introduce the CA Partnership Framework • Explain (in this context) the purpose of a Policy, Strategy or Plan • Introduce the Headings of the Strategy. Ask participants to work in teams of three to identify headings where the CO has had earlier conversations (at an organisational level) and note these with post-it notes ***OR:*** • Conduct a quick card sorting exercise, linking headings to sub-topics (or both) • Keep the headings on large cards on the wall, to remind participants where we are up during the workshops

CA definition of partnership	• Present the CA definition of partnership, highlighting key words, and briefly discussing their meaning
	
	• Small group discussions – consider the key words in the definition – what does this mean for the CO?
	
	• Report back, making sure key messages are highlighted, eg,
	  - there is no one correct type of relationship, or one correct process for developing partnerships; instead it is about matching type and process to what we want to achieve
	  - is about drawing on different strengths, not CARE as master of the universe
	  - focus is on impacts, not workloads
	
	Note: this session is not about adapting the definition, instead is about understanding it.

Partnership Practice	• Outline the good practice indicators from the CA Partnership Policy, noting that these are linked to current research findings • Small group discussions – review the meaning of each indicator, find examples of each, and suggest ways to strengthen practice against these indicators in the CO Note: 'ensure clarity of purpose of the partnership' often requires the most discussion, as this is often confused with the objectives of the project, rather than the partnership.
Partnership principles	Using the Partnership principles from the CA Partnership Policy: • Conduct a card sorting exercise to clarify meaning, and think of examples to map experience to application of the Principles

Step 2	Capture the CO experience to date

This step aims to develop shared understanding of experience *across* the CO, capture some key lessons, and preview Step 3, focusing on contextual analysis.

Possible process	Key steps
Timeline	Small groups: • Discuss key milestones around partnership practice in the CO over the past 10 years. Note milestones on a card, using colour (a). These can include project level milestones, or organisational level (eg PA); and can be about the types of partnerships, what the relationship has focused on, etc. • Discuss key external milestones around partnership practice in the CO. Note milestones on a card, using colour (b). Note, these can include government and policy milestones, developments in the development/civil society sector, donor imperatives etc Plenary • Map the cards to prepared flipchart sheets according to dates • With participants, draw out some key themes Small group discussion: • Identify 3-4 points to summarise the CO partnership practice to date • Identify 1-2 key lessons we should take from this experience into our future practice Report back, linking results to headings in the Strategy Note: A Core Team could be asked to identify any points for further analysis of lessons learned, to present at a future workshop.
Reflection	• Conduct a structured reflection process to capture experience to date, and lessons learned around specific aspects of partnership, relevant to the likely future directions of the CO. Examples could include: - Experience around a particular stage in the Partnership development process, eg partner selection - Experience around working in partnership with different types of partner organisations, eg government agencies, CBOs, NGOs - Experience around working in different partnership modalities, eg co-implementation partnerships, networks, consortium, collaborative

	partnerships, strategic and non-resource based partnerships
	- Experience of working in partnership in different contexts, eg emergencies, remote areas, urban settings
Variation	• CO experiences are captured and analysed before the workshop, and presented for discussion.

Step 3	Analyse contextual drivers

This step focuses on developing shared understanding of future trends influencing partnership development, across the CO. It should also help participants to think more organisationally, and with a future orientation, to support development of the Strategy goal and objectives later.

Process	Key steps
Discussion	Plenary • Brainstorm some categories for contextual trends with participants. These will include: - Government priorities and future directions - Civil society development and future directions - INGO / UN future directions - Donor imperatives - CARE priorities – CI programming principles, PA, WE etc - CO trends – capacities, priorities etc Small groups • Discuss each category, noting likely trends and influences, and note ideas on cards. Have different groups start on different topics to make sure all are covered • Report back, calling for ideas, or conduct a structured gallery walk. • Summarise.
Variation	• Prepare a set of cards which already have key trends identified, and conduct a card sorting exercise, followed by some reflection questions to capture CO experience

Step 4	Consider technical aspects

For any Strategy development, it is important that participants have some shared understanding of current thinking around the topic, and future possibilities for CO priorities and practice. For Partnership, this could include sessions about:

- **Types of organisations** the CO could partner with

- **Capacity building** / capacity strengthening dimensions of partnership, for example the scope of capacity building; methods; and M&E of capacity building.

- **Good practice** characteristics, or key success factors – See Step 1

- Implications of the **Program Approach** for partnership thinking

- Staff **beliefs and attitudes** to support effective partnership

These topics are obviously workshops in themselves.

Each CO will select different modules depending on experience and priorities in the in the CO to support _Strategy development_. Suggestions are outlined in **Annex 1.**

Note: Some COs will also be conducting separate sessions (with some new topics) to build skills and attitudes to support effective partnership development and practice.

Step 5	Develop vision and areas of change

This step sharpens the focus on the future directions of partnership for the CO, and is a link between current practice and the future goal and objectives of the Strategy. Some different options for this are outlined below.

Process	Key steps
Visioning	**Step 1 - Introduction** • Link this session to earlier discussions about partnerships as relationships; and that these relationships will be different with different organisations, at different times [give examples] • Explain that this session is about the future. We will spend this session 'dreaming', picturing what sort of partnerships we might have in the future **Step 2 – Visioning the future** Note- the process outlined below uses a visualisation method. Other visioning methods could be used, eg Appreciative Inquiry, Story telling Plenary • Close your eyes and dream about your project work in the future, and the kind of partnerships they have • What do you see? • Take 5 mins to write down some ideas about what you see Small group work – work in project related teams • Share the different 'visions' you have for partnership within your group • Draw a picture which shows you hope partnership will look like in your area of work in 5 years time **Step 3: Areas of change** • Conduct a structured gallery walk, review each drawing and what it means • Facilitator to write key words on post-it notes during this plenary discussion; [Facilitator to work out some areas of change, based on notes made during the plenary discussion and from earlier observations as the drawings are prepared] • Present 3-4 headings as key areas of focus / change for the future. Ask participants to discuss these headings, allowing time to internalise this. • Report back on small group discussions.

Process	Key steps
	Make sure this is documented.
Alternative - Card exercise	Small groups: • Review card sets with 'key ingredients' of our future directions. • Groups to review each card, discuss meaning, and decide whether this is this important or not for our way forward on partnership. New ideas can be added on blank cards • Groups to cluster their cards in categories of similar ideas. Report back • Ask one group to present the categories they have devised, and ask other groups to add changes • Organise the cards in clear groups, with headings for areas of change • Make sure this is documented

Step 6	Develop goal, objectives and framework

This step brings together the areas of change as Goals and objectives for the Strategy; and develops the Partnership Framework for the CO.

- Goal and objectives should be prepared in advance, based on the outcomes of Step 5, and discussed with the ACDP/Core Team before the session, or during a break

- Framework. This is most likely to focus on a classification of Partnership Modalities for the CO. The Framework should also be discussed with the ACDP/Core Team before the workshop

  Note, the most common Framework is to classify partnerships into the following modalities - MOU Partner [where relevant]; Co-implementation partnership; Alliance or Network; Consortium; Collaborative partnership; Strategic and non-resource based partnerships.

  It is helpful to separate these from contract type, eg grant, fee for service, consortium.

Process	Key steps
Goal and Objectives	Plenary - Present the proposed goal and objectives, and seek initial feedback Small groups - Discuss the proposed goal and objectives, and suggest any changes. This could be combined with, or separated from, a second phase of group discussions, covering: - What are the main results you expect the CO to achieve through partnership in the future? - What capacities will the CO need to move forward to these visions? Report back
Framework	Plenary: - Introduce this session, linking the framework to the Strategy Goal and Objectives, and explaining that the framework will help cluster the different type of partnership relationships the CO expects to develop in the future. - Present the Partnership Modality headings for the CO, drawing out an example of each

Process	Key steps
	Small groups:
	• Card sorting exercise, matching contents of the modalities matrix. Leave one column blank for groups to complete; **OR**
	• Small group work, analysing the different headings using a matrix with headings such as 'strengths', 'limitations', 'most effective when…'
	Report back:
	• Place work from one group on the wall, and review with the large group. Challenge / suggest changes as appropriate
	Summarise – the key message is that no one modality is correct or incorrect; what is key is that the modality fits the objective of the relationship, and aims to evolve over time.
	• Review the 'Strategy' component of the work to date, ie Goal, Objectives and Framework, and prompt some final reflections on this, eg participants work in pairs to discuss what the benefits will be.
	• Outline next steps to finalise the Strategy.

This is likely to be the end of the main workshop process.

Step 7	Action plan

This step is likely to be completed in a separate process, possibly after the Strategy has been documented and reviewed. It may also involve a different group of participants. For example:

Option 1

- Participants involved in the Strategy development review / develop some key action points (headings) that are needed to implement the Strategy over a 5 year period. Examples could include internal capacity building, access to toolkits, recruitment of staff with new skill sets, more effective linkages with other organisations (partners, training providers), revised project budget guidelines, revised organisational structure, revised salary structure, PQ staff to support partnership development.

- A small group (Core Team) takes these points and develop and overall Action plan; and an annual action plan. Linkages to other work should be made, eg to the HR Strategy

Option 2

- A small (core team) take these points and develops an overall Action Plan; and an annual workplan. Linkages to other work should be clear, eg to the HR Strategy

Annex 1: Workshop processes for 'technical' aspects of Partnership

The processes outlined in this Annex are some suggestions around relatively quick processes to develop some shared understanding, and stimulate thinking to allow for a future orientation in Strategy development.

The suggestions below do not aim to build capacity in effective partnership practice – for this, additional sessions and new topics would be required.

Topic	Focus / Possible processes

Types of organisations	**Option 1:**
	
	• Conduct a simple brainstorming exercise to identify the types of organisations that could be partners. Ask participants to map their current experience to the types identified, and discuss potential benefits from expanding this.
	
	Option 2:
	
	• Conduct a simple brainstorming exercise to identify the types of organisations that could be partners
	
	• Conduct a small group exercise to analyse the different types of potential partner organisations. For example, ask groups to work through a matrix, discussing headings around
	  - Current roles in development
	  - Potential future roles in development
	  - Potential linkages with CARE

Capacity building: Scope	This session develops a framework for classifying where capacity building energies are focused, in order to help stimulate thinking about new possibilities in the future. • Conduct a brief plenary discussion about the relationship between partnership and capacity building. Using circles on the whiteboard, show that there is strong overlap, but they are not the same. **Step 1: Focus of capacity building** • Outline four headings [horizontally] for the focus of Capacity building – Technical, Programmatic, Organisational, and Institutional • Conduct a small group card sorting exercise to develop clarity about the topics within each heading **Step 2: Target for capacity building** • Outline four headings [vertically] for the Target of Capacity building, to form a matrix with the headings in Step 1 – Individuals, Organisations, Networks and Umbrella Organisations, and Sector / Policy environment • Conduct a small group exercise, with each group adding examples of

Topic	Focus / Possible processes
	work in the CO to the cells of the matrix • Bring this together as one large matrix on the wall. Lead reflections on themes emerging, including where the CO has strongest experience, and where future work could be focused Note: this session could be extended to include some mapping of results achieved across different parts of the matrix.
Capacity building: Methods	This session aims to challenge thinking that capacity building is achieved solely by CARE conducting training sessions **Option 1:** • Conduct a simple brainstorming exercise to identify different capacity building methods. Ask participants to discuss their experiences, and conclude with a strong message that the type of method selected will depend on the objectives sought; experience of partners and CARE; and availability of third party capacity building providers. **Option 2:** • As per Option 1, except begin with a card sorting exercise, to introduce new thinking.
Capacity building: M&E	Outline 3 streams of M&E for capacity building: 1. M&E of capacity building - the quality and relevance of the capacity strengthening processes 2. M&E of capacity - results achieved 3. M&E of wider changes resulting from strengthened capacity - ultimate benefits for poor and marginalised groups • Conduct a small group exercise to assess CO experience on each, and identify areas for future M&E practice

Partnership and the PA	• Conduct a brainstorming session [in plenary or small groups] to identify how working programmatically may influence partnership experience, for example:
	  - Access to better analysis – eg through Policy and Institutional analysis conducted to support program designs
	  - Development of partnerships with research organisations
	  - Involvement in more networks, to support work on UCPs
	  - Commitment to more collaborative partnerships, with the long term focus of PA
	  - Development of strategic and non-resource based partnerships

Topic	Focus / Possible processes
	• It may be helpful to deepen understanding of strategic and non-resource based partnerships. One option is to develop a series of scenarios / case studies for discussion, to facilitate learning with practical examples
Beliefs and attitudes to support partnership	• Conduct a values clarification / challenging exercise to draw out current beliefs and attitudes about working in partnership, or about current relationships with partners Options include drawing methods, responding to value statements, role plays, etc • Draw out values and attitudes emerging from the exercise, and lead a discussion about the ways in which values and attitudes influence practice, • Conduct a ranking exercise to highlight positive values and attitudes for effective partnership practice Note: this could be extended with a minefield exercise [to confront fears and concerns], or an exercise focusing on the value of diversity and differences.