



P.ACT

# PARTNERSHIP CO-DESIGN TOOLKIT

**MITD-Lab**  
designing for a more equitable world



**SEED**  
promoting entrepreneurship  
for sustainable development

# P.ACT: Partnership Co-design Toolkit

## Practical Tools for Co-Designing Inclusive Partnership Models

Hybrid partnerships –i.e. collaborations between impact enterprises, corporations, NGOs, or governments – are essential to scaling inclusive business in Base of the Pyramid (BoP) markets. However, developing and deploying these types of partnerships is challenging, as it requires a fine integration of the goals, resources, cultures and incentives of organizations that are inherently very different from each other. Enticed by the promise of scale, impact entrepreneurs can often hurry into hybrid partnerships without a sound and



transparent business model that ensures an equitable return on investment for all partners. This can strain relationships, jeopardize the partnership sustainability and the potential for impact. **How do we co-design partnership models where all partners - despite their diversity - have a shared understanding and buy-in for the value created and captured within the partnership?**

The **Partnership Co-design Toolkit** offers a disciplined approach to co-designing business models for resilient value chain partnerships.

The toolkit builds upon MIT D-Lab learnings from designing and testing the [P-ACT Conversation tool](#) and SEED's experience with their [Enterprise toolkit](#); as well as an in-depth literature review of existing partnership design and facilitation tools.

# Who is the audience for the P.ACT toolkit?



## Are you...

- An **impact entrepreneur** or working for an impact venture
- An **impact intrapreneur** (within a corporation, an NGO or a government agency)
- An accelerator or an incubator manager supporting impact entrepreneurs
- A partnership broker or facilitator helping partners design and deploy an impact driven partnership

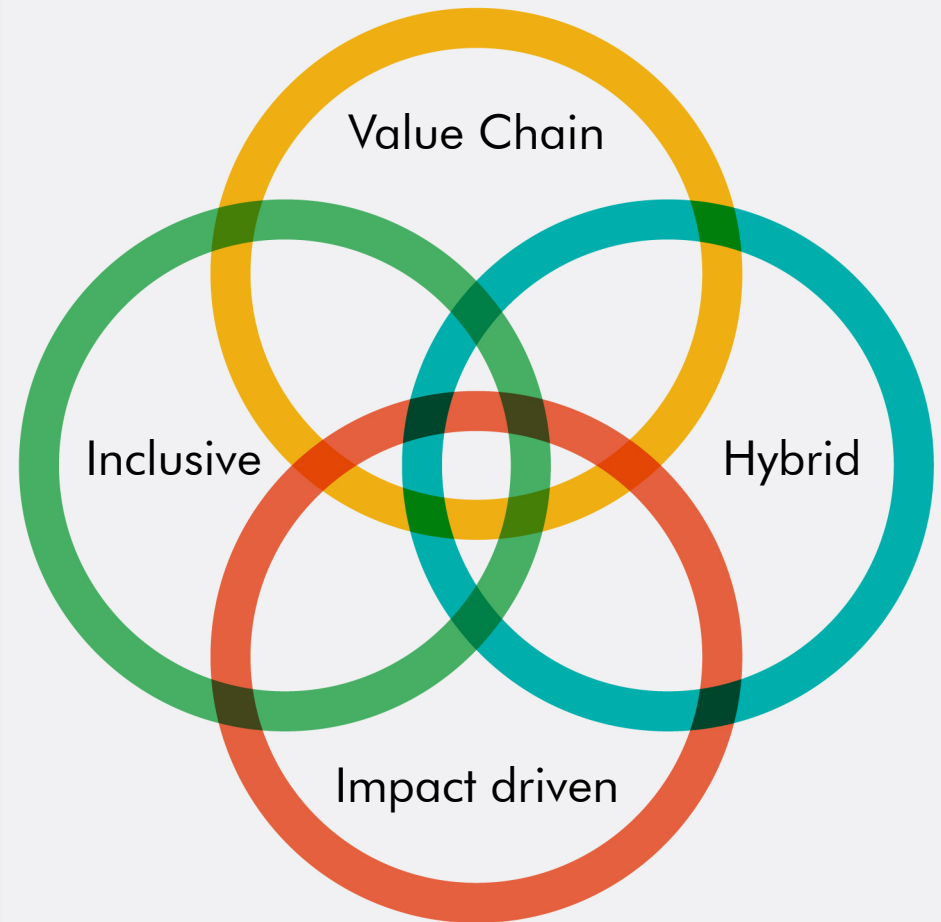
**If yes, are you** joining a diverse group of one or more organizations to initiate a value chain partnership, and facing challenges in:

- Aligning on partnership goals, value proposition or impact
- Defining the partnership activities and /or the partners' roles and responsibilities
- Negotiating a fair distribution of the partnership generated value and incurred costs
- Establishing common processes to monitor the partnership success over time...

# What type of partnerships does P.ACT support?

**Are you** working on a partnership with the following characteristics:

- **Value chain centric:** Partnership engaging various organizations that are integrating their existing value chains or developing new ones to create, enhance and deliver a value proposition to a target customer.
- **Hybrid:** Partnership involving different type of organizations including impact enterprises, corporations, NGOs, or governments.
- **Impact-driven:** Partnership initiated with the purpose to generate positive economic, environmental or social changes for underserved populations.
- **Inclusive:** Partnership where all involved partners are considered of equal rights and importance, and the value generated is fairly distributed among participating stakeholders.



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# What will P.ACT help you achieve?

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This toolkit enables two or more partners to **co-design** inclusive partnerships, by:

- Facilitating negotiation between partners
- Building relationships and empathy within the partnership group
- Accelerating the partnership development process
- Achieving contract readiness
- Increasing the partnership success rate

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While primarily designed to be used collaboratively by a group of partners, this toolkit content can also be leveraged in a **role-play** mode by a single organization to:

- Prepare for partnership negotiations or critical discussions
- Build the capacity of staff to engage in hybrid partnerships

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## What is unique about P.ACT?

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This toolkit was designed with four unique attributes to maximize partnership success:

**Co-Design process:** It follows a disciplined four stage co-design framework that ensures inclusive participation and continuous engagement of all partners, improving buy-in and commitment.

**Value focus:** It puts emphasis on defining both the value created and the value captured through the partnership. It focuses the partners attention on generating value for their customers and beneficiaries as well as for their organizations.

**Collaborative approach:** It fosters individual self-assessment and reflection alongside collective problem solving, constructive dialogue, decision making, and action planning.

**Modular use:** It enables users to diagnose their partnership needs and helps them identify the right tools to move their partnership forward.

## When should you use P.ACT?

This toolkit should be used during the initiation phase to help partners get ready to engage in a collaboration. More specifically:

***After partners have been identified:***

The core group of partners should be selected. The toolkit will engage representatives from each partner organizations in co-designing the partnership model.

***Before a contract is signed:*** After a partnership contract is signed, the opportunities for negotiation and co-design become more limited.



# What is inside the P.ACT toolkit?

## 4 Co-design stages

P.ACT introduces partners to four stages of co-design, each building on the previous, to bring partners closer to developing a complete partnership model and get ready to commit.

- **Learn:** Explore and clarify the partners respective motivations, capabilities and cultures
- **Imagine:** Converge on the partnership value proposition, impact and type
- **Create:** Define the partnership activities, roles, and governance structure
- **Evaluate:** Establish the distribution of value and costs and define the monitoring metrics

12  
tools



Each tool contains:

- Step-by-step instructions
- Illustrative examples
- Worksheets to document outputs
- Facilitator tips
- Mural templates



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# How should you use P.ACT?

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## Tool selection

- **Complete the needs assessment** to identify which tools you need. Set clear goals accordingly to what each tool will help you achieve.
- **Establish a sequence** for using the tools selected by consulting the prerequisite and follow-on tools suggested. While each tool can be used independently, these suggestions will guide you to maximize the benefit of the toolkit.

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## Convening mode

- **Structure a workshop series** of single sessions or multi-day workshops according to your goals and the partnership team availability.
- **Consider online workshops** when physical meetings are difficult. The toolkit provides you with **Mural templates** for visual online collaboration.

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## Partnership team

- **Involve key representatives from each partner** in all sessions. The representatives should have a clear mandate to speak on behalf of their organization.
- **Build a core team** who participates in all co-design meetings, and also create opportunities for more members of each organization to meet and connect.

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## Facilitation Plan

- **Invite an external facilitator** to moderate sessions, navigate sensitive discussions and ensure tangible outputs are reached.
- **Consider internal facilitation** if external facilitation is not feasible. Clearly assign a facilitator and ensure they are sufficiently prepared by reviewing the step-by-step instructions and facilitation tips within each tool in advance of the workshops.

## Facilitation tips

- **Allocate about 1.5-2 hours per tool** to allow enough time to introduce the topic, do group-work, have a final discussions and reach agreement on results and next steps.

- **Prepare for workshop including making posters for each worksheet** by printing or drawing templates on paper, or by using mural templates for visual online collaboration. Bring post-it notes and markers for everyone, where applicable.

- **Create a good working atmosphere** before delving into exercises e.g. through ice-breaking activities. Include enough energizers and breaks to keep energy levels high.

- **Be sensitive to differences in culture,** hierarchy and customs between organizations.

- **Ensure and support active participation** by making each conversation actionable and applicable. Accommodate different learning styles and preferences.

- **Document all output in real time,** either in the worksheets or on separate flipcharts that everyone in the room can read. Print or write down key results for participants to take home.

- **Share lean but comprehensive documentation** with participants after the workshop, e.g through pictures taken from all output flipcharts/posters.



# What is Mural?

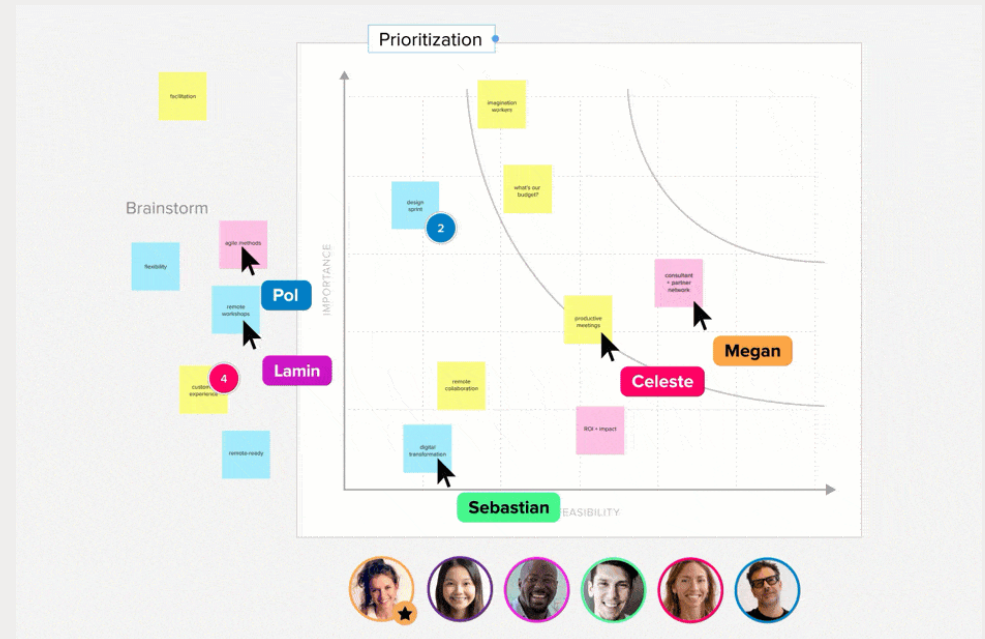
MURAL is a visual workspace that helps you collaborate together. 'Murals' are giant boards to map out content, that can be used like a large flipchart. Everything is securely saved in the cloud and finished boards can be exported as PDF files.

PDF templates of our tool worksheets can be uploaded into a mural sheet as a background to work together with all Mural functions.

MURAL accounts for hosting a working group can be set up at low costs and free trials are available as well. Guests can access sheets without their own account.

Introduction to MURAL Video:

<https://youtu.be/mBFFpsy-RUo>



# P.ACT Needs Assessment

Do you **have clear and coherent** answers to the following questions?  
If not, check-out the corresponding P.ACT tool.

**Page**



- 15  [Drivers Pyramid](#) Why do we want to engage in this partnership?
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- 44  [Value Proposition](#) What value will we deliver together? To whom?
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## What is next?

We hope you will enjoy and benefit from this toolkit as much as we did from co-designing it. We are seeking feedback and opportunities to further test the tools, so we would welcome to hear from you.

- **Feedback:** We are looking for feedback or ideas for how we can improve on the toolkit content or design.

- **Case study development:** If you have tested the toolkit or one of the tools and are willing to share your experience and insights, let us know. We will consider the possibility of writing a short case study on it.

- **Testing:** If you are interested in testing the toolkit on your partnership, we will assess the feasibility of supporting you as part of our P.ACT toolkit testing plan.

For more information, please contact Saida Benhayoune ([saida@mit.edu](mailto:saida@mit.edu))



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# About the partners

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## **About MIT D-Lab**

D-Lab works with people around the world to develop and advance collaborative approaches and practical solutions to global poverty challenges. The program's mission is pursued through interdisciplinary courses, research in collaboration with global partners, technology development, and community initiatives — all of which emphasize experiential learning, real-world projects, community-led development, and scalability. [www.d-lab.mit.edu](http://www.d-lab.mit.edu)

## **About SEED**

SEED, founded in 2002, is a global partnership for action on sustainable development and the green economy through supporting eco-inclusive

entrepreneurship with toolified business development support. Its complementary ecosystem programmes focus on policy, financing and collaboration instruments that multiply the social, environmental and economic impacts of entrepreneurship.

[www.seed.uno](http://www.seed.uno)

## **About the Inclusive Partnerships Learning Lab**

Co-led by Saida Benhayoune of MITD-Lab and Magdalena Kloibhofer of SEED, the learning lab convened a group of inclusive business practitioners over a 12-month period to explore key questions related to partnership co-design and co-create the tools developed for this toolkit. The lab participants included

members of the [MIT Practical Impact Alliance](#), as well as the 2019-20 cohort of the [D-Lab Scale-Ups](#) social enterprise accelerator. With a regional focus on East Africa, the lab examined and distilled lessons learned from a series of case studies. The case studies focused on social businesses partnering with corporations, NGOs or government to establish new or enhanced value chains for impact products or services in BoP markets. The insights gathered from the lab's 10 monthly online sessions and two in-person meetings informed the content development of the present P.ACT toolkit.

## **Get in touch:**

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# Acknowledgement

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## **Learning Lab Members**

We are grateful to the learning lab members who contributed their ideas and insights to the development of this toolkit. These include representatives from members of the MIT Practical Impact Alliance: Johnson & Johnson, Siemens Stiftung, USAID Morocco and World Vision International. And a special thank you to the 2019 D-Lab Scale Up Fellows: Kwangu Kwako, FixChap, EcoAct, Solar Freeze, Expressions Global and clinicPesa; and EpN network member Technology for Tomorrow, who helped us test many of the tools and provided some of the case studies illustrated in this toolkit.

## **Guest participants**

We are also very thankful to Bart Doorneweert of Farstar who contributed the [Partnership Canvas](#) as part of this toolkit, to Astrid van Agthoven of Aqua for All who gave a guest presentation about the [PPP Canvas](#), and to Stephanie Bauer of Intellectap for providing input into the learning lab structure and content.

## **Editing & Design**

Wing Ngan (Ink Design)  
Amanda Epting (MIT D-Lab)

# *Drivers Pyramid*

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***Why do we want  
to engage in this  
partnership?***

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**Why do we want  
to engage in  
this partnership?**



# Drivers Pyramid

## Why do we want to engage in this partnership?

Impact-driven partnerships often fail due to misalignment on goals. Each organization is driven by different motivations and expectations that often cannot all be fulfilled through the partnership. This tool enables partners to surface, share, prioritize and clearly define a common set of goals that ALL partners collectively commit to achieving through the partnership.

### Drivers Pyramid *Mural Template*



## Why should we use it?

To align on the partnership goals which all partners should commit to.



## What will we accomplish?

Clarify our own and our partners' individual drivers.

Identify our common drivers and the must-have individual drivers for each partner.

Establish and define a list of shared goals that the partners will commit to.

## Step-By-Step

### Step 1

Identify individual drivers



### Step 2

Define partnership goals



### Step 3

Establish partnership commitments

## Step 1:

# Identify individual drivers

**1.1** Individually, list all the motivations bringing your organization to join this partnership. These are your individual drivers.

**1.2** Organize your list of individual drivers along the Driver Hierarchy Pyramid:

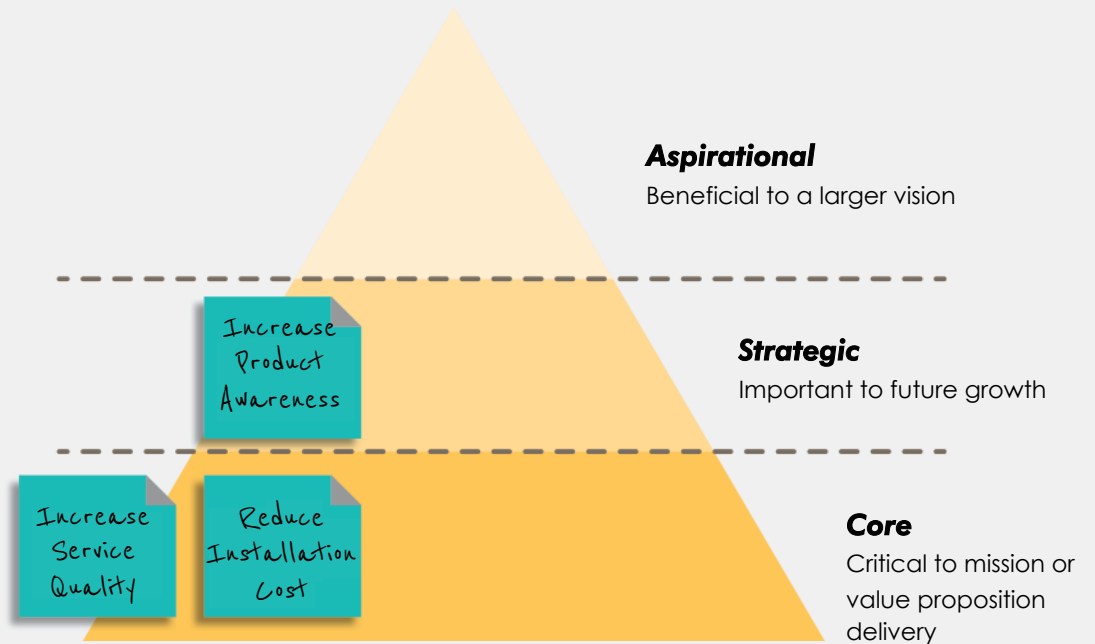
- **Core:** These drivers are critical to fulfill your organization's mission and/or to deliver your value proposition.
- **Strategic:** These drivers will be important to execute on your organization's future growth strategies.
- **Aspirational:** These drivers will help you build towards a longer-term vision.

Example:

○ **Partner 1**  
**EcoAct:** Recycled plastic timber products

○ **Partner 2**  
**FixChap:** Online marketplace for handyman services

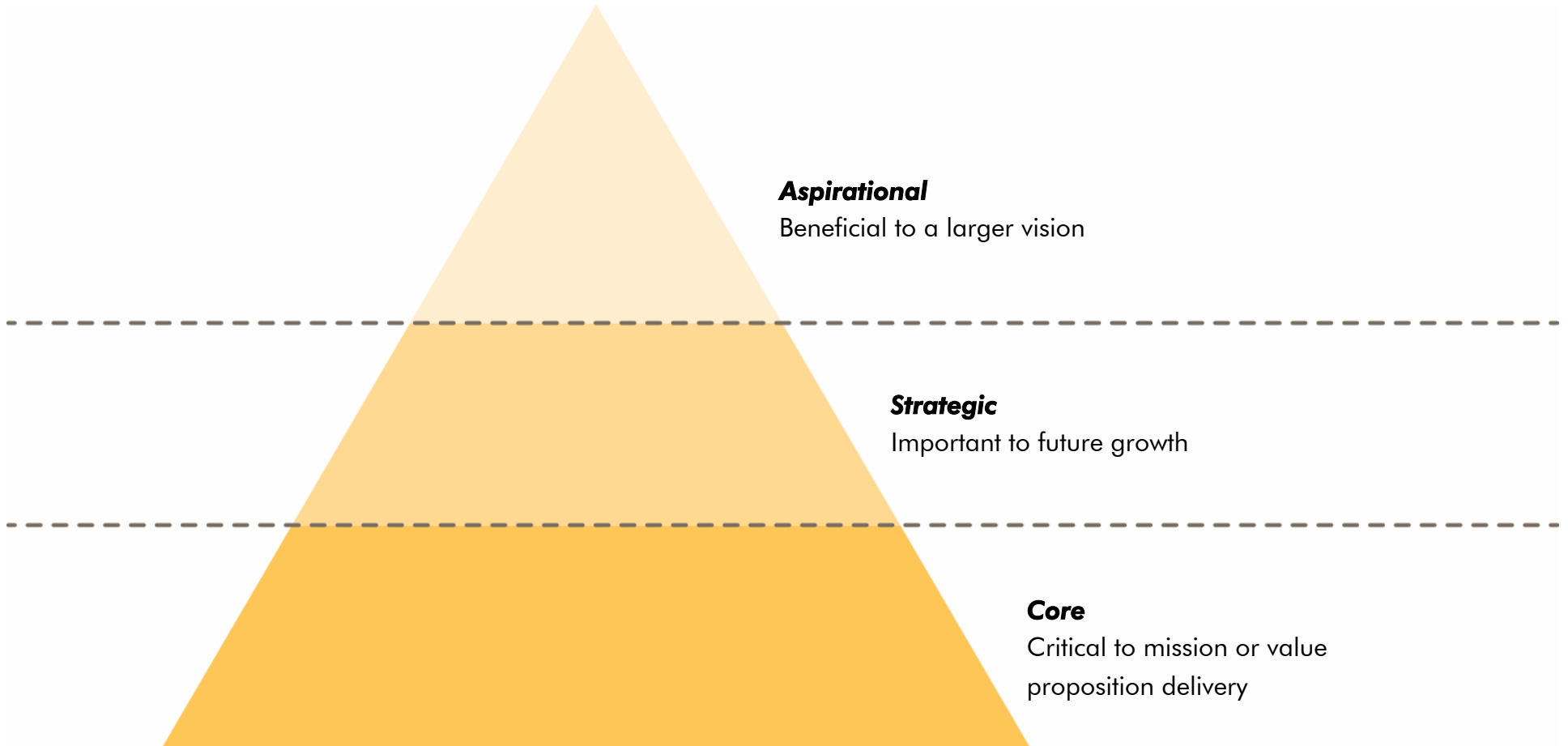
## Driver Hierarchy Pyramid



## Worksheet 1:

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# Driver Hierarchy Pyramid



## Step 2:

# Define partnership goals

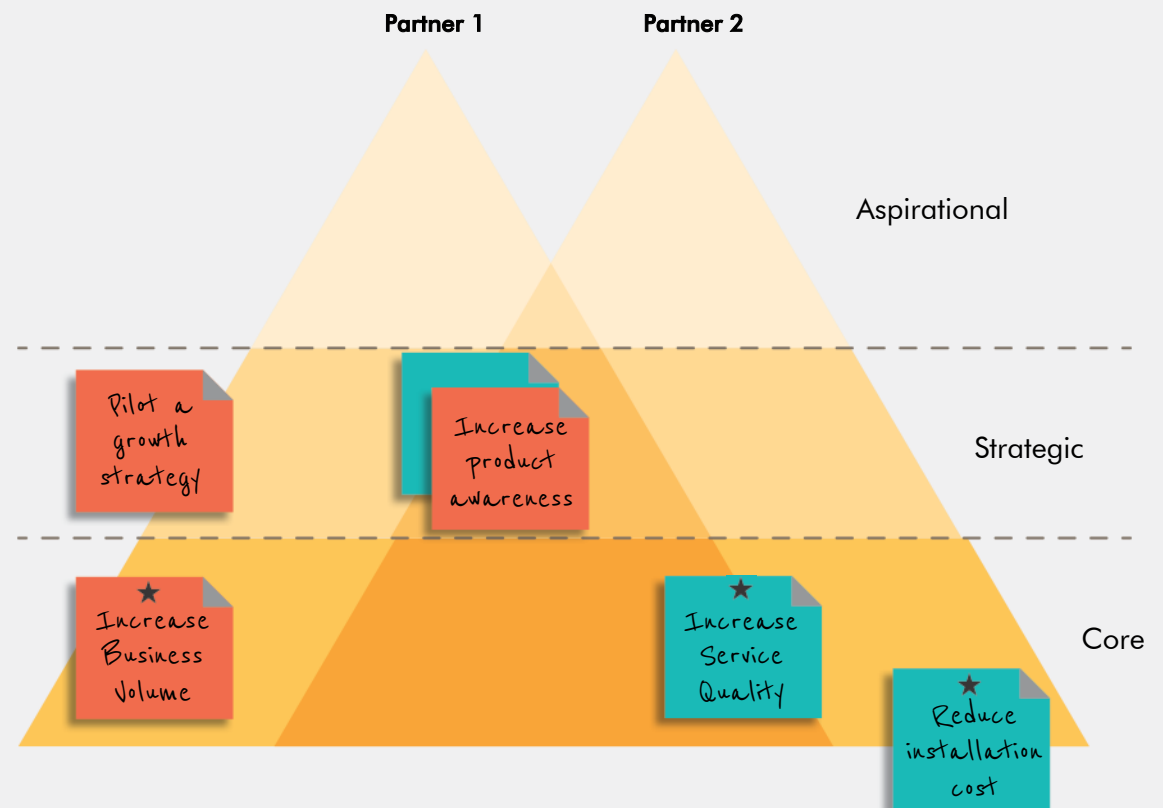
- 2.1** Share your drivers with your partner(s). Take turns explaining each one and its placement on the pyramid.
- 2.2** Identify any drivers that are shared by more than one partner. These are your **common drivers**. Rearrange them towards the center of the pyramid.
- 2.3** Identify, among the remaining individual drivers, those that are essential for any of the partners to move forward with the partnership. These are your **individual must-have drivers**. Identify them with a star or a colored sticker.

The combination of the Common drivers and the Individual Must-Have drivers makes the list of the **partnership goals** that ALL partners should commit to.

Example:

**Partner 1**  
**EcoAct:** Recycled plastic timber products

**Partner 2**  
**FixChap:** Online marketplace for handyman services



## Step 3:

# Establish partnership commitments

**3.1** Together, fill in the **Partnership Commitment Table** with the details for your agreed upon partnership goals. These are the partnership goals that ALL partners will commit to make happen. This commitment means that all partners become equally accountable for working towards each one of the partnership goals. For each goal, discuss and clarify:

**? WHAT** value do we expect the partnership to generate in order to fulfill this goal?

**? WHO** are the individual(s) or organization(s) who will receive this value?

**3.2** *Discuss the following questions*

- ? Are we all committed to this list of key drivers?**
- ? Are there any issues identified requiring further negotiation before moving forward?**

Example:

- Partner 1**  
**EcoAct:** Recycled plastic timber products
- Partner 2**  
**FixChap:** Online marketplace for handyman services.

## Partnership Commitment Table

<b>Why?</b>	<b>Who?</b>	<b>What?</b>
Partnership goal	Who receives the value	What value will be generated
Increase in product awareness	EcoAct and FixChap	Increased brand awareness
Increase service quality	EcoAct customer	Faster, better quality service, reduce damage
Increase business volume	FixChap and their handymen	Increased income
Reduce installation cost	EcoAct customer	Lower total price

Worksheet 2:

# Partnership Commitment Table

<b>WHY?</b> Partnership Goals	<b>WHO?</b> Who receives the value?	<b>WHAT?</b> What value will be generated?

# Facilitation tips

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## Step 1 *Individual brainstorming*

- Make sure that each participant comes up with 3-6 individual drivers during the brainstorming.
- Not all the drivers can be Core drivers. Challenge participants to think critically about the level of priority for each driver they have brainstormed.

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## Step 2 *Sharing + collective decision making*

- Encourage participants to ask questions to clarify the definition and nuances around each driver.
- Encourage keeping the list to 3-6 goals. It may be hard for people to let go of drivers that are important to them. So remind them that while they can have other individual drivers, the partnership goals should focus only on those that they will hold each other accountable for.

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## Step 3 *Collective definition*

- It is important that at the end of the meeting everybody feels strongly committed to each of the goal on the list. Push for more discussion if you feel it is needed. Print the goals on a card and give it to each participant to use in future conversations.



# Capability Match

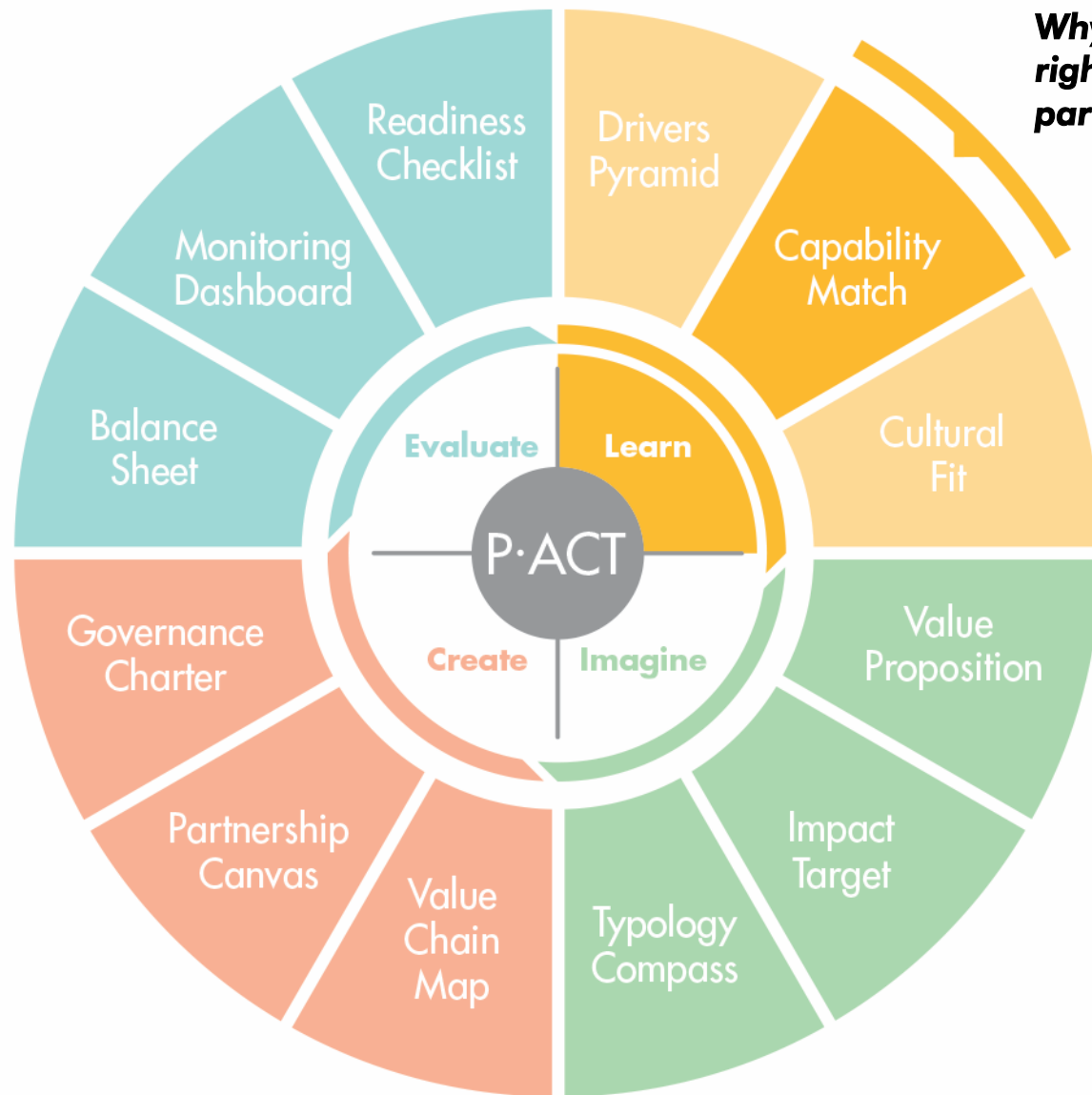
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***Why are we the  
right group of  
partners?***

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**Pre-requisite tools:**

- Drivers Pyramid

**Next tools:**

- Cultural Fit
- Value Proposition

# Capability Match

## Why are we the right group of partners?

Organizations engaging in partnerships for social impact often make broad assumptions about their partner's capabilities or their willingness to mobilize certain assets for the partnership. This tool enables partners to verify their assumptions about their respective capabilities, and to identify any tension or gaps that may require further negotiation or engagement of other partners in order to fulfil the partnership goals.

### Capability Match *Mural Template*



## Why should we use it?

To assess whether the group of partners collectively have the critical capabilities needed to fulfill the partnership goals.



## What will we accomplish?

Define the capabilities required to fulfill the partnership goals.

Assess the group of partners against the required capabilities.

Establish a plan to address any tensions and gaps in capability fit.

## Step-By-Step

### Step 1

Define  
capability  
requirements



### Step 2

Assess  
partners'  
capabilities



### Step 3

Address  
tensions  
and gaps

## Step 1:

# Define capability requirements

- 1.1** Together, use the Drivers Pyramid tool to identify your **partnership goals**.
- 1.2** For each of the partnership goals individually, ask yourself: **What capabilities does our partner(s) need to absolutely have in order to achieve success around this particular goal?** ALL partners can contribute criteria to ALL partnership goals.
- 1.3** For each goal, share your brainstormed criteria and align on a final list. Start with the criteria for your common drivers then move to discuss those for your individual must-have drivers.

Example:

**Partner 1**  
**EcoAct:** Recycled plastic timber products

**Partner 2**  
**FixChap:** Online marketplace for handyman services

<b>Partnership Goal</b>	<b>Criteria: What capabilities do we need to achieve success?</b>
Increase service quality	Partner can cross advertise
Increase service quality	Partner needs to fulfill requests in less than 48 hours
Increase service quality	Partner average service quality rating needs to be > 4 stars
Reduce installation cost	Partner price per installation needs to stay below \$30
Access new customers	Partner needs to serve customers within target profile

## Step 2:


# Assess partners' capabilities

**2.1** Self-assess your organization against the list of criteria. Ask yourself:

- Can our organization fulfill this criteria? And, to what extent?
- What competencies or resources can we contribute?
- How unique is our contribution compared to other potential market actors?

Use color coded stickers or other markers to record your assessment against each criteria.

Example:

 **Partner 1**  
**EcoAct:** Recycled plastic timber products

 **Partner 2**  
**FixChap:** Online marketplace for handyman services

<b>Partnership Goal</b>	<b>Criteria: What capabilities do we need to achieve success?</b>	<b>Partner 1</b>	<b>Partner 2</b>
Increase product awareness	Partner can cross-advertise		
Improve service quality	Partner needs to fulfill requests in less than 48 hours		
	Partner average service quality rating needs to be > 4 stars		
Reduce installation cost	Partner price per installation needs to stay below \$30		
Access new customers	Partner needs to serve customers within target profile		



= Cannot meet criteria



= Meets partially or developing capability to meet criteria



= Meets criteria

## Worksheet 1:

# Capability Match Table



= Cannot meet criteria



= Meets partially or developing capability to meet criteria



= Meets criteria

## Drivers

**Criteria:** What capabilities do we need to achieve success?

## Capability Assessments

Who can contribute to what?

		Partner 1	Partner 2	Partner 3	Partner 4

### Step 3:

## Address tensions and gaps

**3.1** Reflect together on the resulting collective self-assessment map. Not all criteria need to be fulfilled by all partners, but ALL partners need to feel that ALL criteria are sufficiently fulfilled.

- ? What criteria are under-fulfilled? Why?
- ? Can we negotiate on certain criteria to reach a better fit?
- ? Can we develop the missing capabilities within our group?
- ? Do we need to engage other actors? Who might they be?

**3.2** Identify and record any agreed upon next steps and establish a plan and timeline to execute on them.

Next Steps	Timeline

# Facilitation tips

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## Step 1 **Collective brainstorming**

- Make sure that all participants are contributing ideas and opinions to each driver.
- Align on the criteria for each driver before moving to the next.

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## Step 2 **Individual self- assessment**

- Sometimes partners may have the capability but not be able or willing to use it for the partnership. The self-assessment should reflect and capture this.

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## Step 3 **Collective reflection**

- Ensure the group assigns responsibility and a timeline for each item on their action plan.



# Cultural Fit

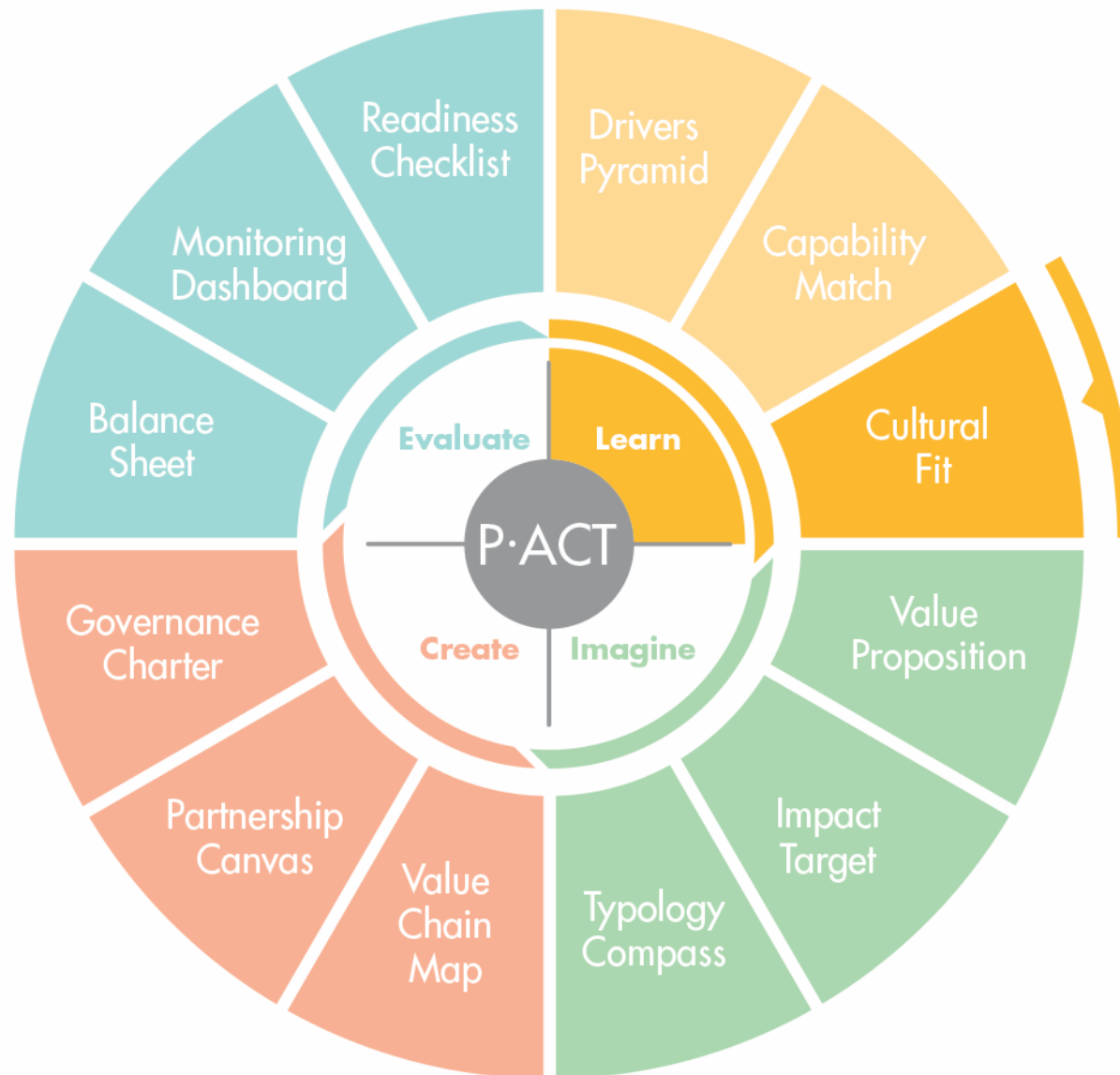
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***How compatible are  
our organizational  
cultures?***

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**Pre-requisite tools:**

- Capability Match

**Next tools:**

- Value Proposition
- Typology Compass

# Cultural Fit

## How compatible are our organizational cultures?

Partners may have the right set of complementary capabilities to fulfill the partnership goals but still fail due to cultural differences. This tool enables partners to engage in an open dialogue about their organizational and team cultural attributes in order to identify and mitigate risks that may arise from these differences.

Cultural Fit *Mural Template*



## Why should we use it?

To reveal and anticipate any cultural risks or barriers that could jeopardize the partnership's sustainability.



## What will we accomplish?

Learn about values, culture and working styles of our respective organizations and the partnership team.

Identify areas of cultural alignment and areas of potential conflict.

Establish mitigation strategies to manage risks or conflict.

## Step-By-Step

### Step 1

Discuss values fit



### Step 2

Discuss working styles fit



### Step 3

Discuss team key personas

## Step 1:

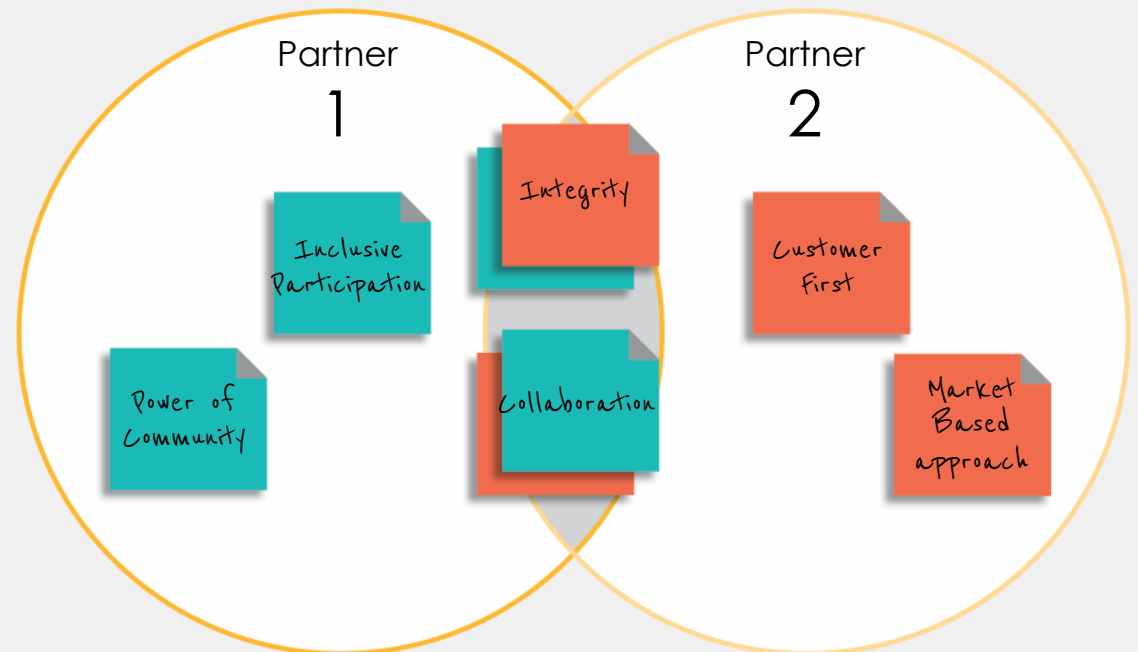
# Discuss values fit

- 1.1** Individually, list your organization's top 3-5 values.
- 1.2** Reveal and explain these values to each other.
- 1.3** Reflect and discuss implications:
  - ? What aspects of our organizational values are similar?
  - ? What aspects of our organizational values are different? What could be the potential implications?
  - ? What strategies can we adopt to mitigate any possible tensions that may arise?

### Example:

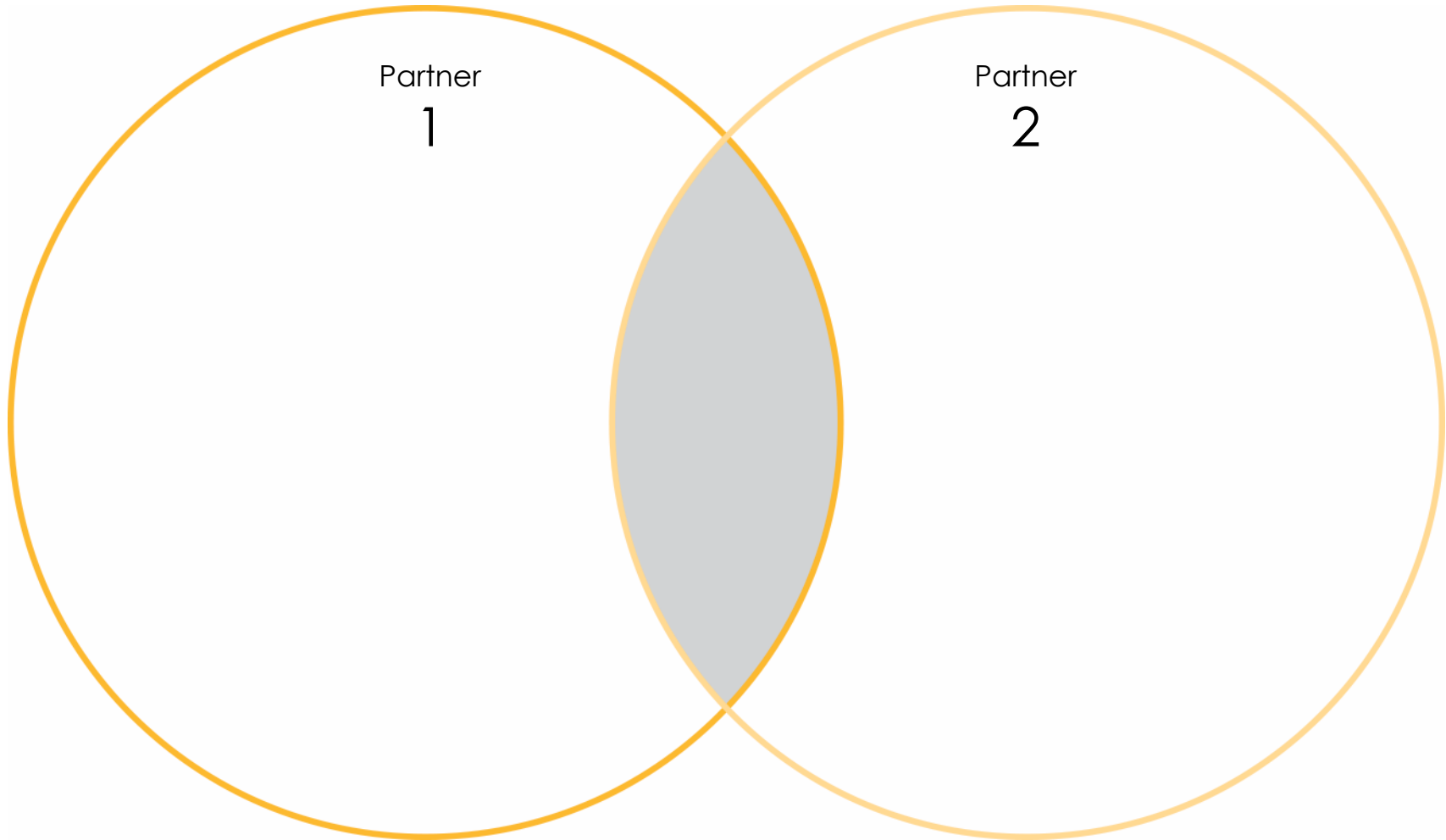
**Partner 1**  
is an international water, sanitation, and hygiene-focused nonprofit organization.

**Partner 2**  
is a water filtration tech start-up.



Worksheet 1:

# Values Venn Diagram



## Step 2:

## Discuss working styles fit

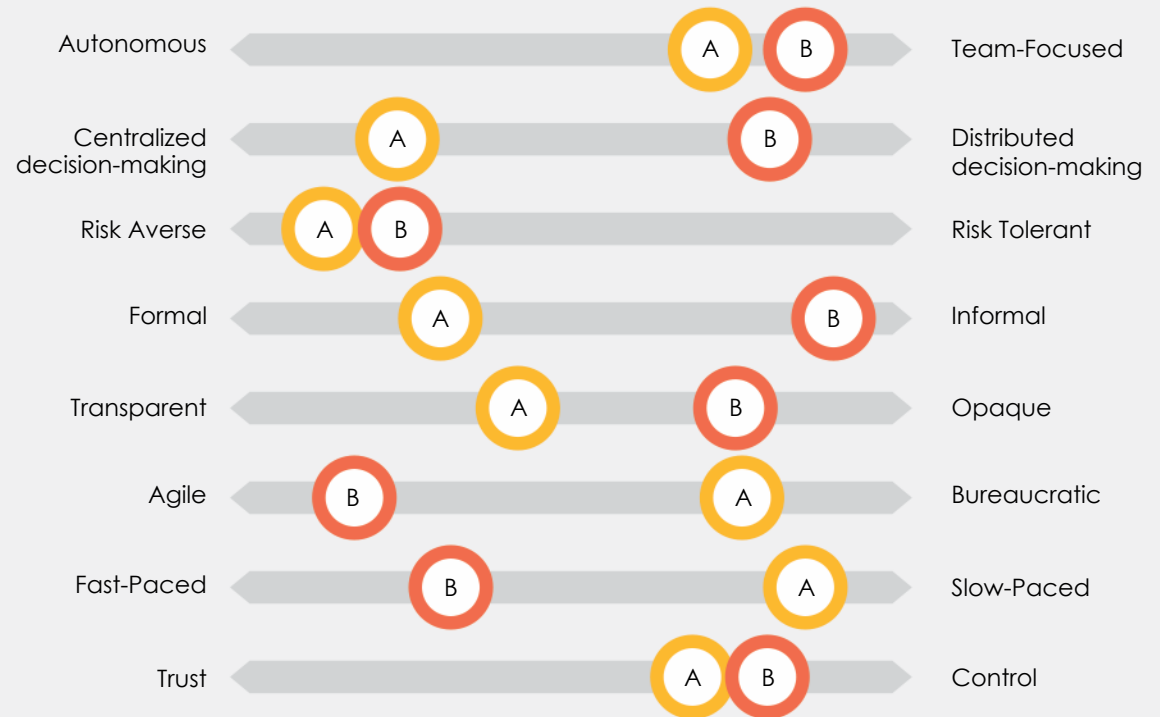
**2.1** Individually, review the **working styles spectrum worksheet** and mark where on the spectrum your organization lies. Add as needed any working styles particularly relevant to your organization in the context of this partnership.

**2.2** One-by-one, reveal your organizational working-style positions. Compare and discuss contrasting answers for each working-style.

**2.3** Together, examine your respective positions on each spectrum and discuss the implications:

- ?** What aspects of your organizational work styles are similar? Is that good?
- ?** What aspects of your organizational work styles are different? What could be the potential implications?
- ?** What strategies can we adopt to mitigate any possible conflicts that may arise?

## Working Styles Spectrum



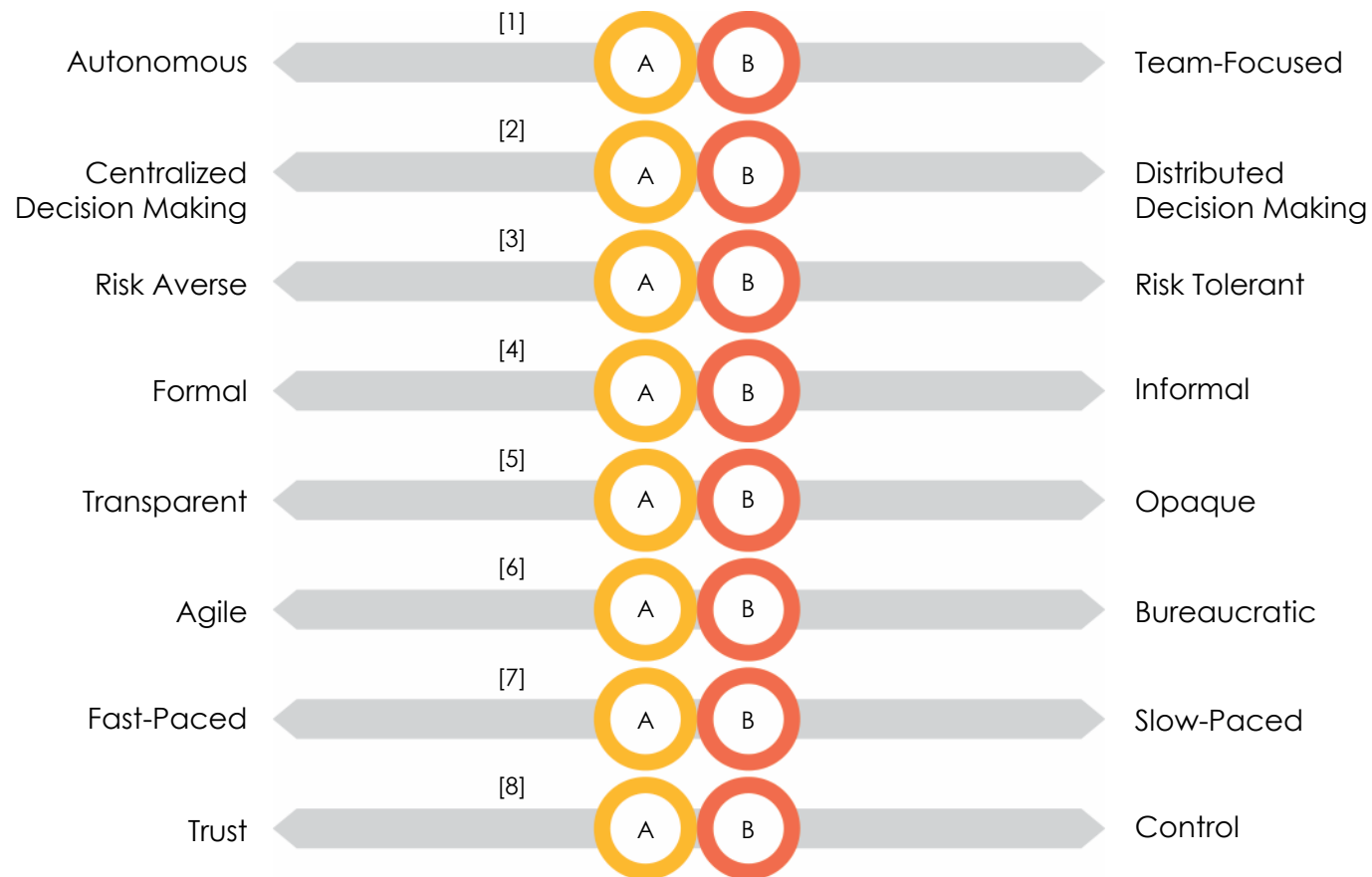
Example:

Partner A

Partner B

## Worksheet 2:

# Working Styles Spectrum



\* Feel free to add as many other work styles as needed that may be relevant to your partnership

Partner A

Partner B

### Step 3:

## Discuss key personas of team

- 3.1** Individually, list on post-it notes detailed information about key members of the partnership team from your organization. Focus on aspects that are particularly relevant to their work in the partnership.
- 3.2** Together, examine the content of the notes and discuss each individual's characteristics and its implications.

? How can this affect their work on the team?

? Which individuals may work particularly well together?

? Who may potentially clash or conflict?

? What could be the potential implications? What strategies can we adopt to mitigate any possible conflicts before they arise?

Example:

Partner A

Person Name: \_\_Rudolf\_\_\_\_\_  
 Role on Team: Lead engineer  
 Engagement Level  
 (high/med/low)  
 Level of influence: (high/med/low)

Any characteristics...

- Skeptical of working with nonprofits
- Concerned about losing independence

Person Name: \_\_Prancer\_\_\_\_\_  
 Role on Team: CEO  
 Engagement Level  
 (high/med/low)  
 Level of influence:(high/med/low)

Any characteristics...

- Enthusiastic about project
- Concerned about long term financial profitability

Partner B

Person Name: \_\_Donner\_\_\_\_\_  
 Role on Team: Field staff supervisor  
 Engagement Level  
 (high/med/low)  
 Level of influence:(high/med/low)

Any characteristics...

- Understaffed/overworked
- Respected and trusted by local community
- No experience with technology

Person Name: \_\_Blitzen\_\_\_\_\_  
 Role on Team: Country Manager  
 Engagement Level  
 (high/med/low))  
 Level of influence:(high/med/low)

Any characteristics...

- No experience with partnerships
- Concerned about staff capacity



**Worksheet 3:**

# Partnership Team Key Personas

**Partner A**

Person Name: \_\_\_\_\_  
Role on Team: \_\_\_\_\_  
Engagement Level (high/med/low)  
Level of influence: (high/med/low)

Any characteristics...

Person Name: \_\_\_\_\_  
Role on Team: \_\_\_\_\_  
Engagement Level (high/med/low)  
Level of influence: (high/med/low)

Any characteristics...

Person Name: \_\_\_\_\_  
Role on Team: \_\_\_\_\_  
Engagement Level (high/med/low)  
Level of influence: (high/med/low)

Any characteristics...

**Partner B**

Person Name: \_\_\_\_\_  
Role on Team: \_\_\_\_\_  
Engagement Level (high/med/low)  
Level of influence:(high/med/low)

Any characteristics...

Person Name: \_\_\_\_\_  
Role on Team: \_\_\_\_\_  
Engagement Level (high/med/low)  
Level of influence:(high/med/low)

Any characteristics...

Person Name: \_\_\_\_\_  
Role on Team: \_\_\_\_\_  
Engagement Level (high/med/low)  
Level of influence:(high/med/low)

Any characteristics...

# Wrap-Up: Culture Exercise

Record your key takeaways and next steps for each culture dimension.

	<b>SYNERGIES</b>	<b>POTENTIAL TENSIONS</b>	<b>STRATEGIC ACTION</b>
<b>VALUES</b>			
<b>WORKSTYLES</b>			
<b>KEY PERSONAS</b>			

# Facilitation tips

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## Overall:

- Start with a mindset exercise that activates empathy, open-mindedness and respect.
- Set expectations about the fact that this is a dialogue tool and does not provide clear black or white answers (compatible/not compatible).
- Acknowledge that culture is as personal as it is important, so it is easy to feel attacked or threatened if people do not share or agree with some elements of your organizational culture. Always remember, we are on the same “partnership” team!
- Encourage partners to be honest and open, but also mindful and respectful when expressing their opinions about each other’s cultural elements.
- Encourage partners to keep an open mind and not take any comments personally, in order to encourage an open dialogue.

# Facilitation tips

## Step 1

### **Individual brainstorming + Sharing + Collective reflection**

- Organizational values are the fundamental beliefs and ideas that guide an organization's choices, actions and how they are implemented (Example: Inclusivity, Ingenuity, Respect...)
- Partners do not need to have the same values, but coherence and similarity in values may indicate a higher propensity to partner successfully.
- Look for values that may be opposite or conflicting and encourage conversation around these.

## Step 2

### **Individual self assessment + Sharing + Collective reflection**

- Working styles are the behaviours and modus operandi typically adopted by an organization's staff (example: Agile/Bureaucratic, Transparent/Protective, Flat/Hierarchical, Risk-averse/Risk-tolerant...)
- Similar working styles do not necessarily indicate compatibility. Consider each case to examine its implications.

## Step 3

### **Individual brainstorming + Sharing + Collective reflection**

- Keep the characteristics shared about a particular individual focused on their work within the partnership team. DO NOT share any personal or sensitive information.
- If a partnership team key persona is part of the exercise, have them take the lead on identifying and sharing their own characteristics.

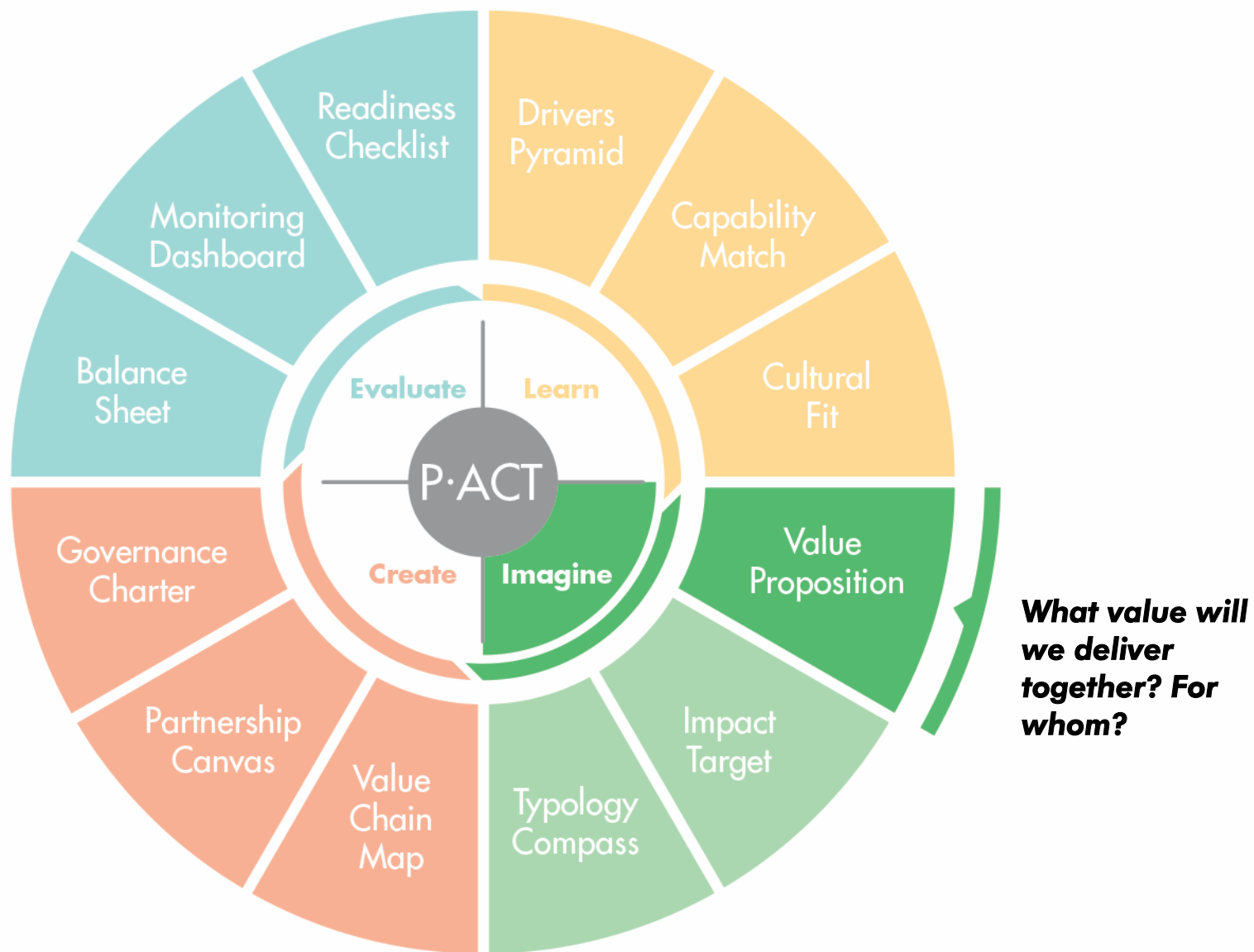
# Value Proposition

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***What value will we  
create together?  
For whom ?***

---

P·ACT



# The Value Proposition

## What value will we create together? For whom?

Partnerships are formed to create or enhance value for common stakeholders. While each partner has its own customers and value proposition, all organizations in a partnership need to define as a group who they will serve together and what value they will deliver beyond what they already offer individually. This tool enables partners to define the partnership's key stakeholders and to articulate the value proposition of the partnership.

### Value Proposition Mural Template

Tool source:  
Adapted from SEED Value Proposition Building tool  
(not public)



## Why should we use it?

To converge on a common definition of the value created through the partnership.



## What will we accomplish?

Identify the partnership's customers & other key stakeholders.

Define the value exchanged between the partners and each stakeholder group.

Articulate the partnership value proposition statement.

## Step-By-Step

### Step 1

Identify  
key  
stakeholders



### Step 2

Map  
partnership  
value flows



### Step 3

Articulate the  
partnership  
value  
proposition

## Step 1:

# Identify key stakeholders

**1.1** Together, list the individuals or organizations that will be exchanging value with your partnership using the categories: **Customers, Community, Partners and Institutions.**

These stakeholders can be already part of the individual organizations' value chains or they can be completely new. Some stakeholders might fit into more than one category, in which case, decide where they may fit best in the partnership as per your judgment.

**1.2** Together, discuss each key stakeholder group and clarify the specific organizations or the detailed profile of a typical representative individual or organization you are targeting.

- ?** How important are each stakeholders to your partnership?
- ?** Which partner has a better relationship with the different stakeholder groups?

## Example

### Partner 1

Expressions Global: supplies affordable piped water for irrigation to rural smallholder farmers in Kenya.

### Partner 2

Solar Freeze: Provides renewable energy-powered mobile cold storage units to rural smallholder farmers in Kenya.

<b>Customers</b>	<b>Individuals or entities who buy or pay for your products/services</b>	<b>exp: Smallholder farmers</b> in Western Kenya districts, 2-5 acres, irrigated, have excess vegetables for sale
<b>Community</b>	<b>Local community members benefiting from the partnership</b>	<b>exp: Farmer families</b> ages 18-60, primary schooling completed
<b>Other Partner</b>	<b>Individuals or entities working with the partners</b>	<b>exp: Extension agents</b> including agro-dealers and government agents operating in the districts
<b>Institutions</b>	<b>Institutions providing an enabling environment for the partnership</b>	<b>exp: Local government</b> represented by the Office of Economic Development



## Step 2:

# Map partnership value flows

**2.1** For each stakeholder group, identify all the types of value the partners will deliver and will receive:

- **Value Delivered:** What additional benefit does the partnership deliver?
- **Value Received:** What will the partners receive in exchange for that benefit?

**2.2** Record the value flows on the value proposition map by depicting arrows between the partners and the different stakeholders. There could be multiple types of value exchanged in each direction.

### Examples of value types that can be exchanged:



Technology



Money/Revenue



Energy



Health



Employment



Research



Education



Goodwill/Loyalty



Networks



Environmental Conservation

Example

# Value Proposition Map

**Partner 1**  
**Expressions Global:** supplies affordable piped water for irrigation to rural smallholder farmers in Kenya.

**Partner 2**  
**Solar Freeze:** Provides renewable energy-powered mobile cold storage units to rural smallholder farmers in Kenya.



## Step 3:

# Articulate the partnership value proposition

Having a clear and concise value proposition statement ensures that partners are aligned and enables them to communicate consistently about the partnership with other stakeholders.

### 3.1 Articulate a general Value Proposition Statement for the partnership:

- It should clearly identify your target customer and other key beneficiaries.
- It should clearly define the value that these individuals will receive from the partnership.
- It should communicate clearly to ALL the stakeholders how they will benefit from engaging with this partnership.

### 3.2 Reflect together on your Value Proposition statement and refine it as necessary:

- Is it **coherent** with each of the partner's present value propositions?
- Is it adding something **relevant** to each of the partner's present value propositions?

Example

# Value Proposition Statement

**Partner 1**  
**Expressions Global:** supplies affordable piped water for irrigation to rural smallholder farmers in Kenya.

**Partner 2**  
**Solar Freeze:** Provides renewable energy-powered mobile cold storage units to rural smallholder farmers in Kenya.



# Facilitation tips

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## Step 1

### **Collective brainstorming**

- People might refer to different stakeholder groups with similar terms. Make sure that the partners are very specific and aligned in defining the profile of each stakeholder group.
- When the stakeholder is a known individual or institution, name them.

## Step 2

### **Collective brainstorming + Collective reflection**

- People tend to focus on value in the form of money or physical products. Challenge partners to think more broadly and consider other less tangible forms of value. Give examples in categories that are particularly relevant.

## Step 3

### **Collective definition**

- Encourage partners to be specific but concise when crafting the statement.
- Before closing, ensure that all partners have a strong buy-in for the final value proposition statement.
- Print the statement on a card and give it to each participant to use in future conversations.

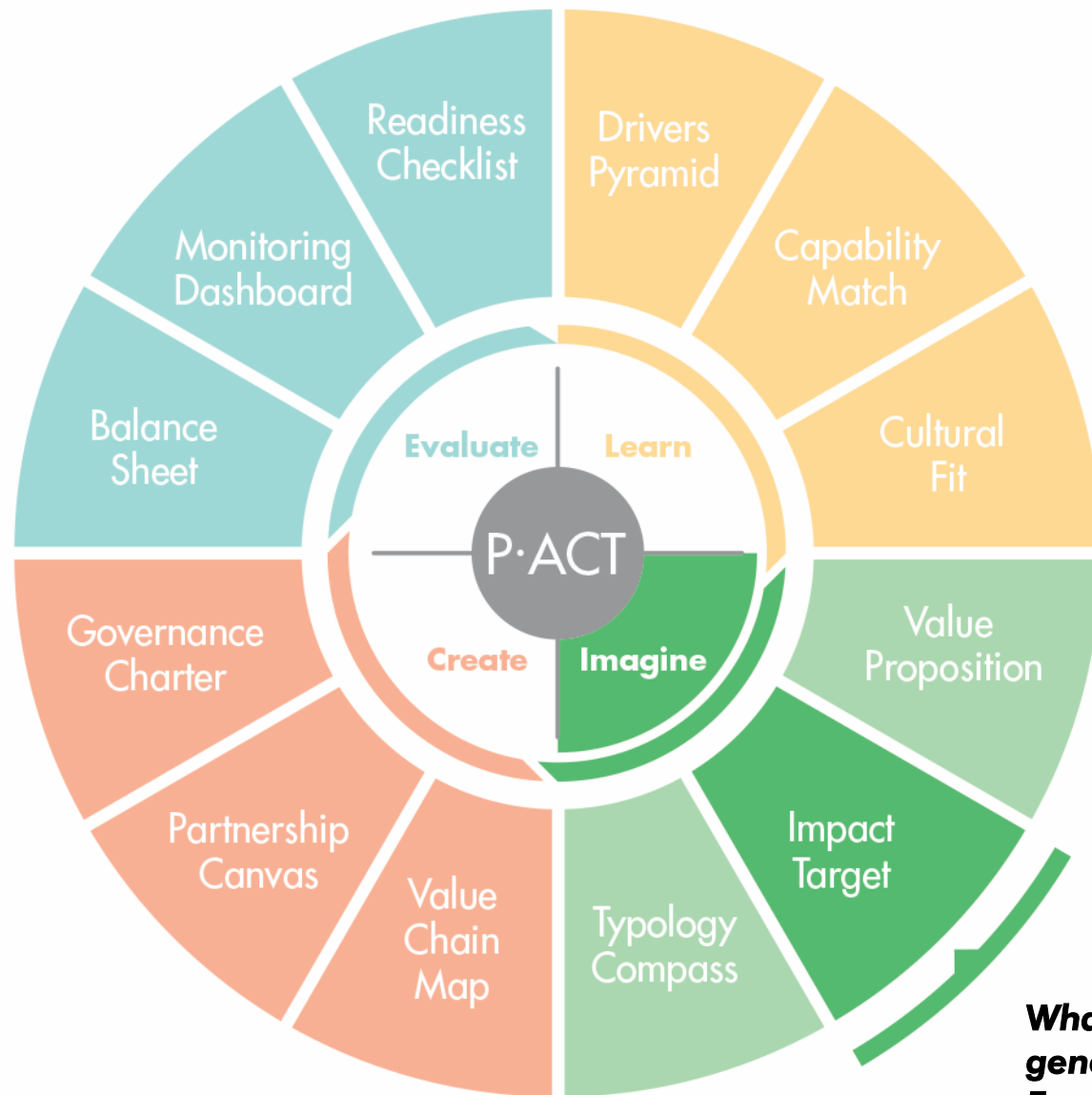
# Impact Target

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***What impact will  
we generate  
together?  
For whom?***

---

P·ACT



**Pre-requisite tools:**  
- Value Proposition

**Next tools:**  
- Value Chain Map  
- Monitoring Dashboard

**What impact will we generate together?  
For whom?**

# The Impact Target

## What impact will we generate together? For whom?

Impact-driven partnerships are established to achieve social, economic or environmental goals. This impact should be derived directly from delivering the partnership value proposition. However, the different partners may be driven by different impact goals. Partners may also have needs for different impact data. This tool enables partners to define the impact they will generate together and align on key aspects of their impact monitoring strategy.

### Impact Target *Mural Template*

Tool source:  
Adapted from SEED tool *Understanding Impact*  
(not public)



## Why should we use it?

To converge on a common set of impact targets for the partnership.



## What will we accomplish?

Align on why we need to monitor impact and who will use the data.

Define the impact we will generate and prioritize which impact goals to measure.

Define how we will achieve and monitor our impact targets.

## Step-By-Step

### Step 1

Clarify impact monitoring motivations



### Step 2

Prioritize impact targets



### Step 3

Define the impact value chain



## Step 1:

# Clarify impact monitoring motivations

**1.1** Together, discuss and align on **WHY** you need to measure impact and **WHO** will be interested in your impact results by answering the following questions:

**Why are each of the partners interested in measuring the impact of the partnership?**

The reasons may be different for each partner and should link to your partnership drivers.

**Who will this partnership generate impact for?**

These are your partnership beneficiary groups: they could include your customers but could also broader groups such as larger communities or society at large.

**Who will be interested in the partnership impact data?**

Stakeholders interested in impact data could include your funders, investors, or other broader stakeholder groups.

**Who else will you be sharing the partnership impact data with?**

You might plan to share with beneficiaries, customers, partners or even the general public.

**What kind of impact data will each stakeholder group be interested in?**

Consider interest in quantitative versus qualitative data, as well as high-level versus detailed data.

**What will we use the partnership impact data for?**

Consider both internal and external uses of impact data.

**Worksheet 1:**

# Impact Monitoring Motivations Table

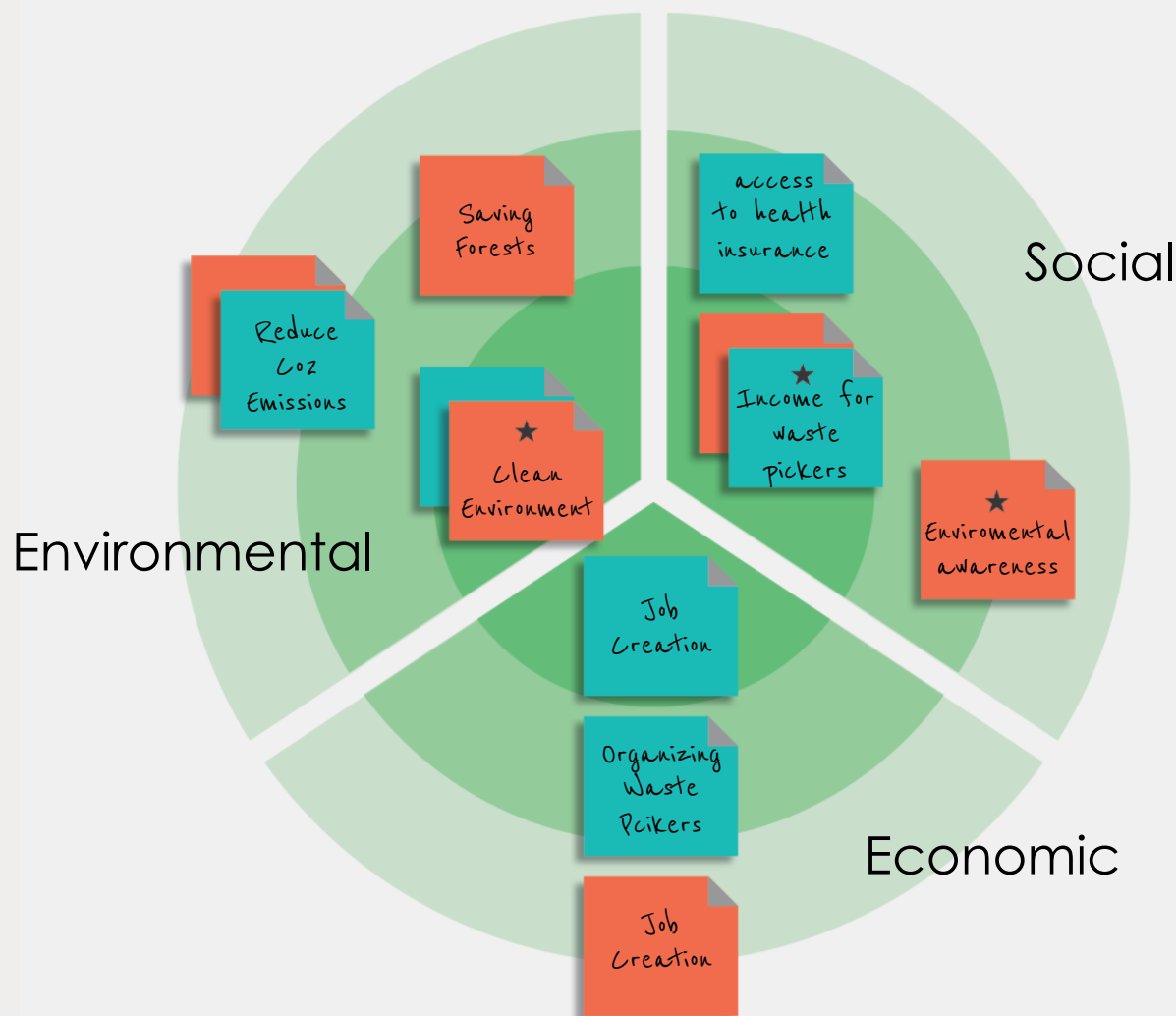
<b>Stakeholders</b>	<b>What are their goals for impact measurement?</b>	<b>What impact data will they need?</b>	<b>What format for the data do they prefer?</b>	<b>How will they use it?</b>
<b>Partnership organizations</b> <ul style="list-style-type: none"><li>• Partner 1</li><li>• Partner 2</li></ul>				
<b>Beneficiaries</b>				
<b>Other Key Stakeholders</b> (exp: Funder, investor...)				

## Step 2:

## Prioritize impact targets

- 2.1** Brainstorm individually **WHAT** types of impact the partnership will generate. Organize your ideas within the three impact bottom-line dimensions: Social, Environmental and Economic.
- 2.2** Taking turns, place your impact goals in the **Impact Target Framework** with highest priority in the center and lower priority in the outer layers.
- 2.3** Discuss and decide collaboratively **WHICH** impact goals you will monitor and identify them with distinctive markers. You can not monitor all the goals. You have to narrow it down to a reasonable list depending on the resources that partners will allocate to impact monitoring. While you might choose to prioritize impacts that fall at the center of the target framework, you might also consider monitoring other types of impacts that may fall further out but that are particularly important to other key stakeholders (like funders).

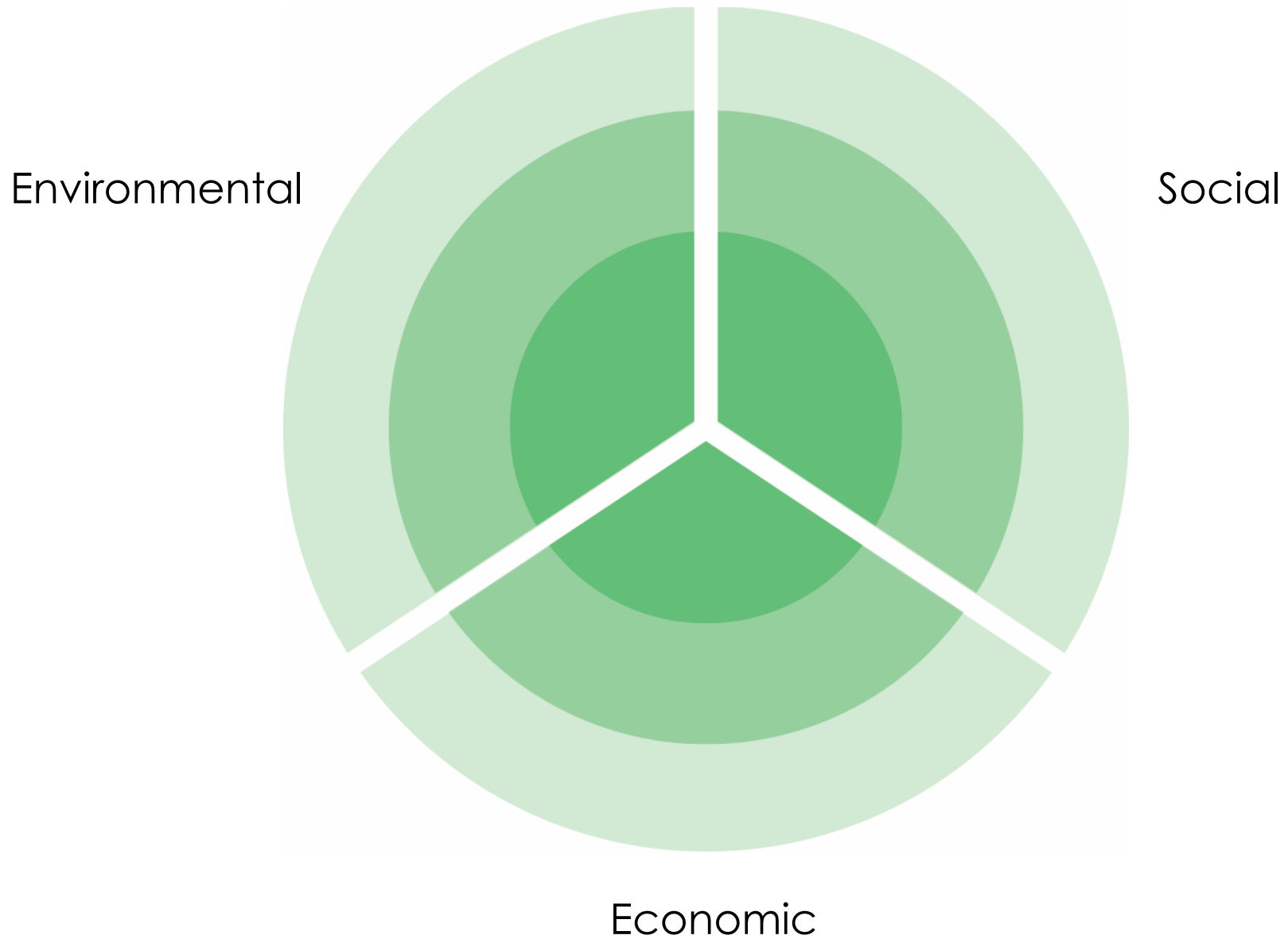
## Impact Target Framework



**Partner 1**  
**EcoAct:** Recycled plastic timber products

**Partner 2**  
 Multinational beverage company

# Impact Target Framework

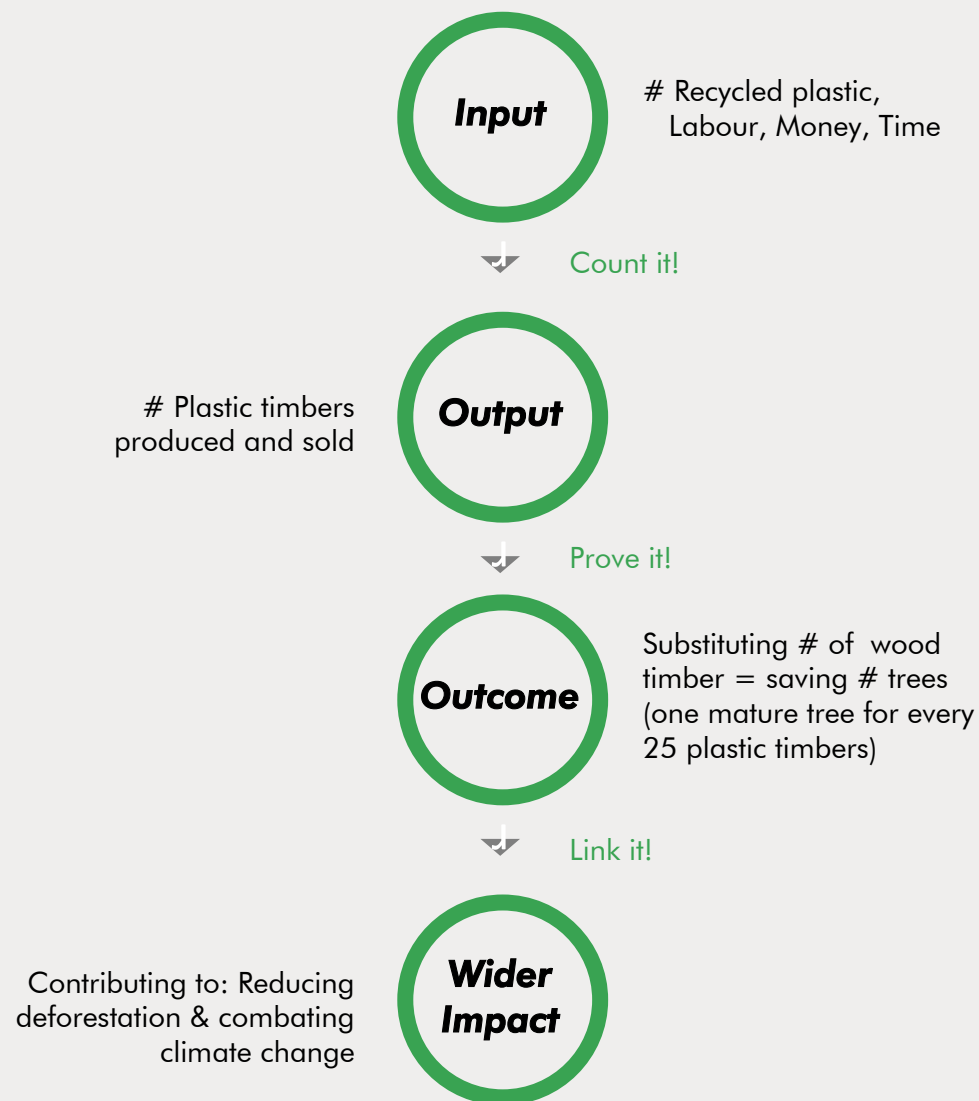


## Step 3:

## Define the impact value chain

**3.1** Together, define **HOW** you will achieve your impact targets by developing the Impact Value Chain for each one:

- **INPUT** - refers to all that goes into the partnership activities leading to the impact goal – e.g. money, time, resources, raw materials. These can be easily **counted** and are often already well-documented.
- **OUTPUT** - refers to the tangible products or services that will be delivered to the impact beneficiaries. These also can generally be **counted** and should be well-documented through the partnership activities.
- **OUTCOME** - refers to the positive effects of the outputs on the beneficiaries. These generally need to be calculated from the outputs by using scientifically **proven correlations or credible formulas** from well-regarded institutions.
- **WIDER IMPACT** - refers to the global challenges and broad positive changes that the partnership will contribute to. Typically, these cannot be measured directly, but studies or clear narratives can **credibly link** your outcomes to a positive change.



**Worksheet 3:**

# Impact Value Chain Table

Impact Area			
 <b>Input</b> Countable investments			
 <b>Output</b> Production and outreach figures			
 <b>Outcome</b> Direct effects caused by outputs			
 <b>Impact</b> Contribution to larger development goals			

# Facilitation tips

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## Step 1

### ***Collective reflection***

- Make sure partners take into account both an internal perspective (within each organization) on impact monitoring e.g. to increase employee morale or enhancing reputation, and an external perspective e.g. satisfying reporting needs or gaining recognition with external stakeholders.

## Step 2

### ***Individual brainstorming + Sharing + Collective decision making***

- Each partner should use a different color of post-it note and cluster similar goals together to ease the reading and discussion of the chart.
- If the partners cannot decide on relative importance, ask what they would be willing to let go of first, if a lack of resources would force them to decide between goals.

## Step 3

### ***Collective brainstorming***

- The Impact Value Chain should be developed for all key impact areas. Print as many worksheets as needed to analyze the value chain of all prioritized impact goals.

# Typology Matrix

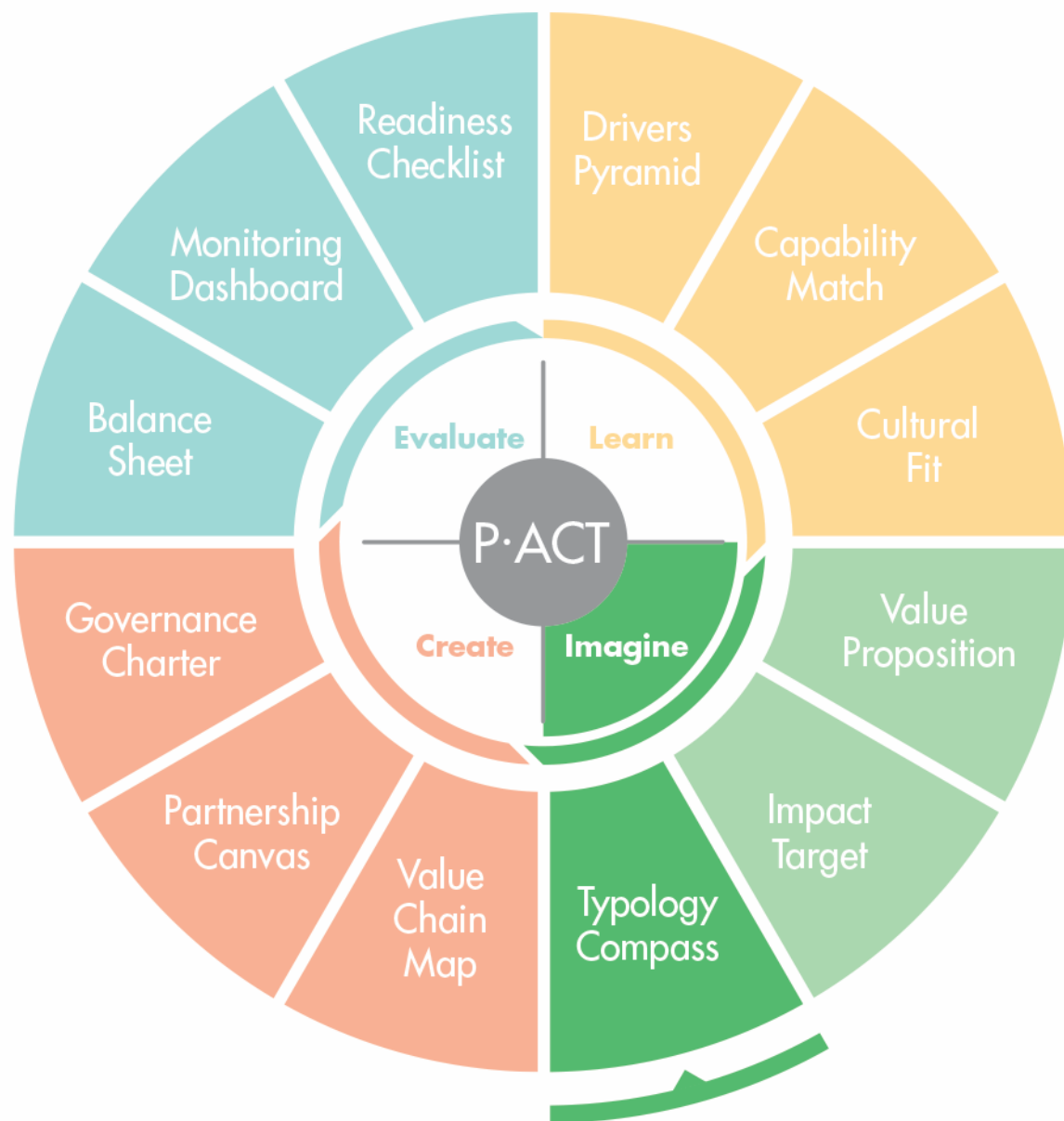
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***What type of  
partnership  
should we build?***

---

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**Pre-requisite tools:**

- Drivers Pyramid
- Capability Match

**Next tools:**

- Value Chain Map
- Partnership Canvas

**What type of partnership should we build?**

# Typology Matrix

## What type of partnership should we build?

Partnerships can range from short-term, low commitment, arms-length relationships to long-term, intensive, and highly-integrated engagements. To justify a high-intensity partnership, partners need to have strong incentives (drivers) and a favorable, enabling environment for the collaboration to thrive. This tool enables partners to select the most appropriate type for their partnership by assessing their partnership drivers and facilitators.

### Typology Matrix *Mural Template*

Tool Source:  
Adapted from the [Propensity to Partner Matrix](#)



## Why should we use it?

To identify the appropriate type of partnership to develop.



## What will we accomplish?

Assess the strength of our respective motivations to engage in the partnership

Assess how favorable the partnership enabling environment is

Establish a specific type of partnership to develop

## Step-By-Step

### Step 1

Assess  
partnership  
drivers



### Step 2

Assess  
partnership  
facilitators



### Step 3

Establish  
the  
partnership  
type

## Step 1:

# Assess partnership drivers

**1.1** The partnership drivers are the motivations and incentives of each partner. Individually, brainstorm the drivers (motivations and incentives) bringing you to the partnership. You can use step 1 of the **Drivers Pyramid tool** to identify and prioritize your individual partnership drivers.

**1.2** Individually, reflect on your drivers and assess them by answering the questions in the **Drivers Assessment table**.

**1.3** Compare and discuss your respective self-assessments.

- Does each partner have strong incentives to engage in a partnership?
- How do the incentive strengths compare between partners?

**1.4** Together, make a qualitative assessment of your collective partnership drivers strengths. Avoid averaging and make a holistic assessment of how strong overall the drivers are. Consider also how balanced the drivers are between different partners.

Partnership Drivers Criteria	Self-assessment	
	Partner 1	Partner 2
Customer	High	Low
Market	High	Low
Financial Profit	Medium	Medium
Organizational Capacity	Low	Medium
Relations	High	Medium
Impact	Low	High
Other:		
<b>Overall Assessment</b>	<b>Medium</b>	

## Worksheet 1:

# Drivers Assessment Table

Partnership Drivers Criteria	Example	Partner 1	Partner 2
<b>CUSTOMER:</b> To what extent will the partnership improve customer service or value?	<ul style="list-style-type: none"> <li>Improved value proposition</li> <li>Improved delivery (shorter cycle time..)</li> <li>Enhanced and more timely information</li> </ul>		
<b>MARKET:</b> To what extent will the partnership generate market advantage?	<ul style="list-style-type: none"> <li>Enhanced marketing mix</li> <li>Ease of access to new markets</li> <li>Gain competitive advantage</li> </ul>		
<b>PROFIT:</b> To what extent will the partnership generate profit stability/growth?	<ul style="list-style-type: none"> <li>Long term volume commitments</li> <li>Cost reductions or avoidance</li> <li>Market share stability</li> </ul>		
<b>ORG. CAPACITY:</b> To what extent will the partnership improve assets or capability access or efficiency?	<ul style="list-style-type: none"> <li>Access to new capabilities</li> <li>Access to shared assets</li> <li>Operational efficiencies</li> </ul>		
<b>RELATIONS:</b> To what extent will the partnership generate new strategic relationships or improve existing ones?	<ul style="list-style-type: none"> <li>Enhanced reputation</li> <li>Access to capital (funders, investors..)</li> <li>Increased influence</li> </ul>		
<b>SOCIAL IMPACT:</b> To what extent will the partnership improve social impact?	<ul style="list-style-type: none"> <li>Enhanced impact effectiveness</li> <li>Access to more beneficiaries</li> <li>Compounded impact</li> </ul>		
Other important driver:			
<b>Overall Assessment:</b> How strong overall are our collective partnership drivers?			

## Step 2:

## Assess partnership facilitators

- 2.1** Partnership facilitators are factors that signal a conducive environment for partnerships to strengthen and succeed. Individually, reflect and assess the questions in the **Facilitators Assessment table**.
- 2.2** Compare and discuss your respective assessments.
- ?** What facilitators are assessed Low? Why?
- ?** What areas do we agree on? Where do we have divergent opinions? Why?
- 2.3** Together make a qualitative assessment of your overall Partnership Facilitators strength. Avoid averaging and make a holistic assessment of how strong overall the partnership facilitators are.

## Facilitators Assessment Table

Partnership Drivers Criteria	Self-assessment	
	Partner 1	Partner 2
Shared Mission	Medium	Medium
Shared Target Group	High	High
Shared Culture	Medium	Medium
Empathy	Medium	Medium
Symmetry	High	Low
Exclusivity	Low	Low
Joint Power	High	Medium
Interdependence	High	High
Proximity	Medium	Medium
Other:		
<b>Overall Assessment</b>	Medium	

## Worksheet 2:

# Facilitators Assessment Table

Partnership Facilitators Criteria	Self Assessment	
	Partner 1	Partner 2
<b>Shared Mission:</b> To what extent do our organizations have compatible or synergetic missions?		
<b>Shared Target Group:</b> To what extent are we serving the same or clearly overlapping groups of users/customers/beneficiaries?		
<b>Shared Culture:</b> To what extent are our organizations compatible in terms of values and working styles?		
<b>Empathy:</b> To what extent are we able to understand each other's constraints and realities? (put oneself in one another's shoes)		
<b>Symmetry:</b> To what extent do we have comparable assets, relative size, financial and brand strength, and negotiation power?		
<b>Exclusivity:</b> To what extent are we willing to enter in exclusive contract or concede strong competitive advantages to each other?		
<b>Joint Power:</b> To what extent are we capable to influence common stakeholders (e.g. competitors, funders, supporters...) by joining forces?		
<b>Interdependence:</b> To what extent are we important to each other's success? (win/ win-lose/lose)		
<b>Proximity:</b> To what extent are we close geographically or benefit from other factors that ease accessibility and communication?		
<b>Prior Experience:</b> To what extent do our organizations have prior history of positive interaction or collaboration?		
Other Important Facilitator		
<b>Overall Assessment:</b> How strong overall are our collective partnership drivers?		

### Step 3:

## Establish the partnership type

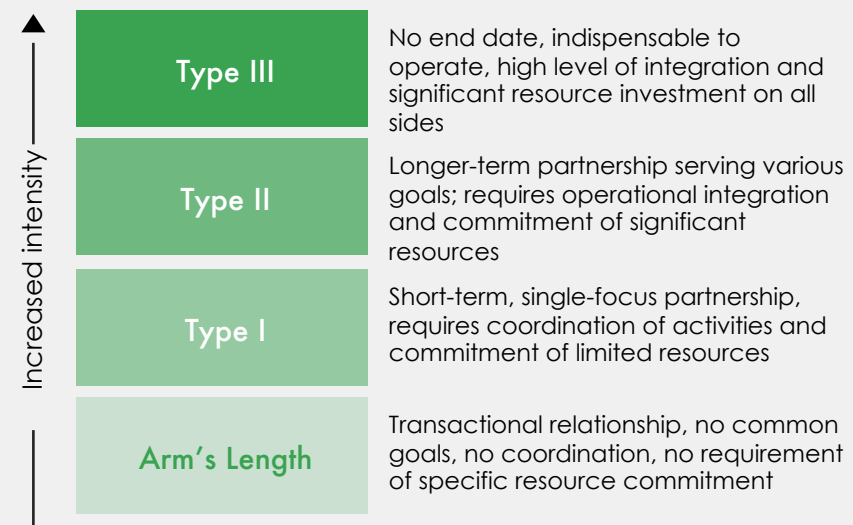
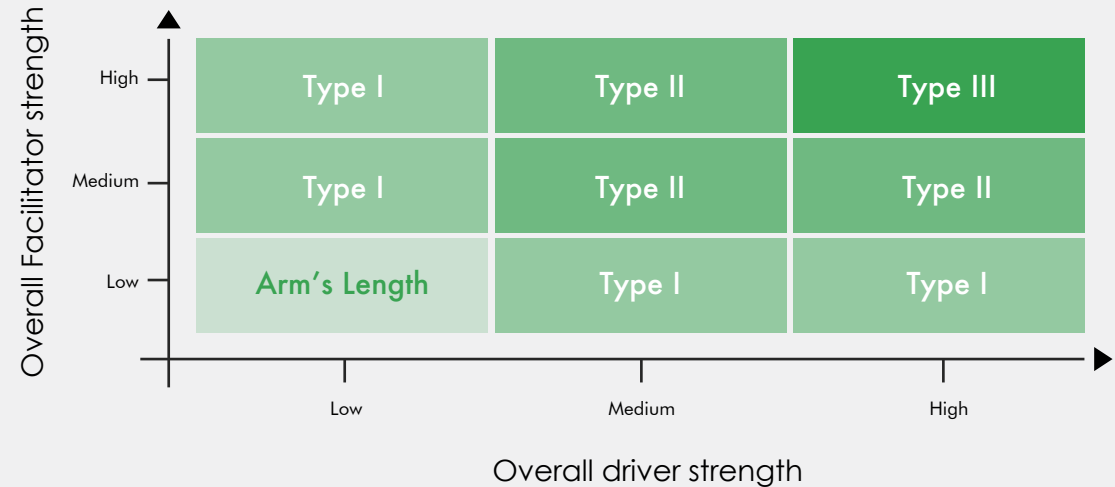
**3.1** Place your partnership qualitatively on the Partnership Typology Matrix and discuss the outcome

**3.2** Discuss the matrix recommendations and the implications for your partnership

? What is the timeframe for your partnership? Short, medium, long-term? Be as specific as possible about expectations.

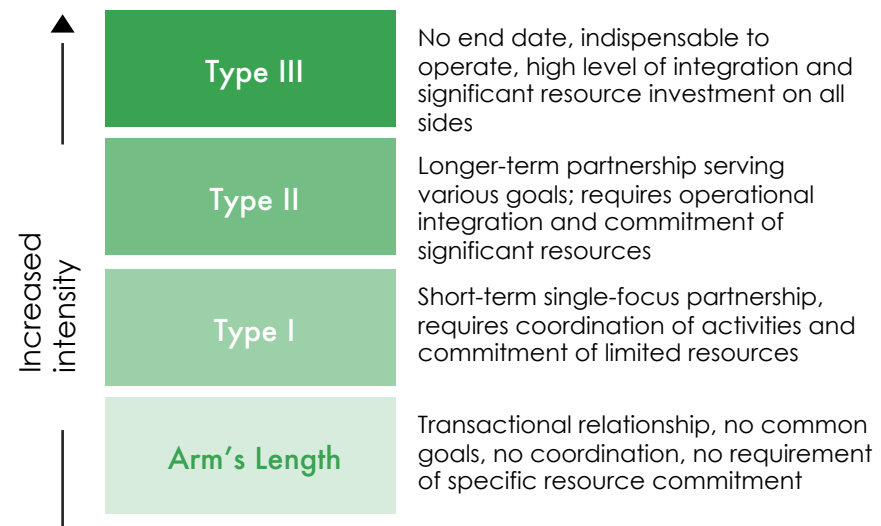
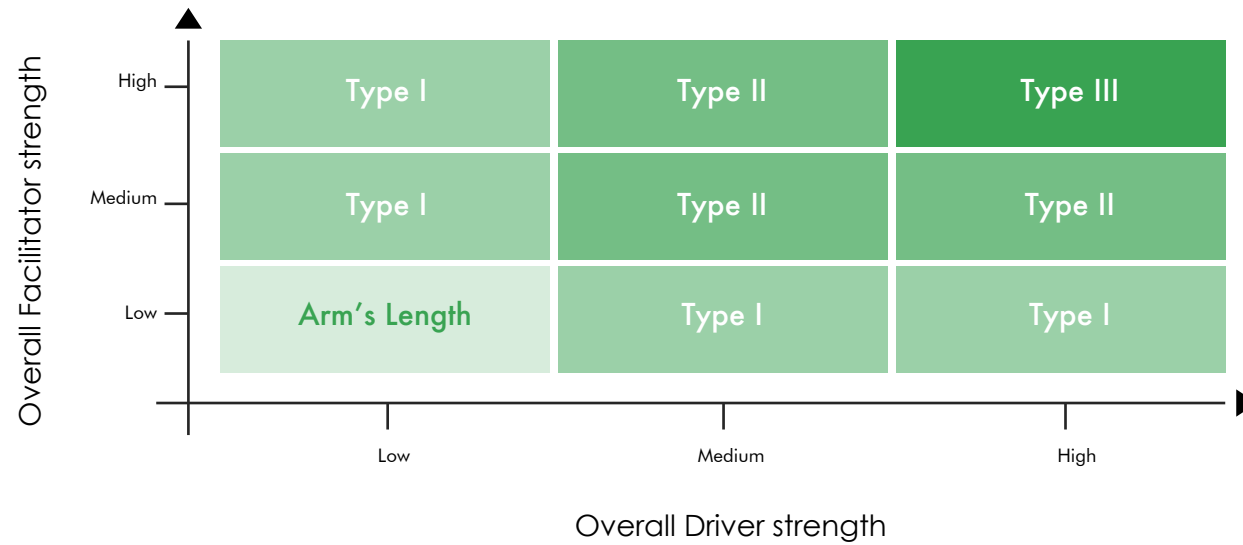
? What type of resources will you need to invest?

? What coordination activities need to be put in place between the different organizations?



## Worksheet 3:

# Partnership Typology Matrix





# Facilitation tips

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## Step 1 and 2 *Individual self- assessment + Sharing*

- The lists of drivers and facilitators suggested, while comprehensive, may not capture the particularities of every partnership. Encourage partners to examine the lists and decide if they need to add criteria that is relevant to their partnership.
- Partners may have different assessments for the same criteria. They may be able to converge on the same assessment after discussing or not. In that case, just take note of the different assessments and move on. They should take those differences into consideration when making their overall partnership assessment.

## Step 3 *Collective reflection*

- The framework is qualitative in nature and should be used largely as a conversation starter. If partners cannot agree on the appropriate type, encourage them to discuss the suggested questions before making a final assessment.
- A lower partnership type is not a weaker or less important partnership. Consider using relevant examples to illustrate the different types with success stories.

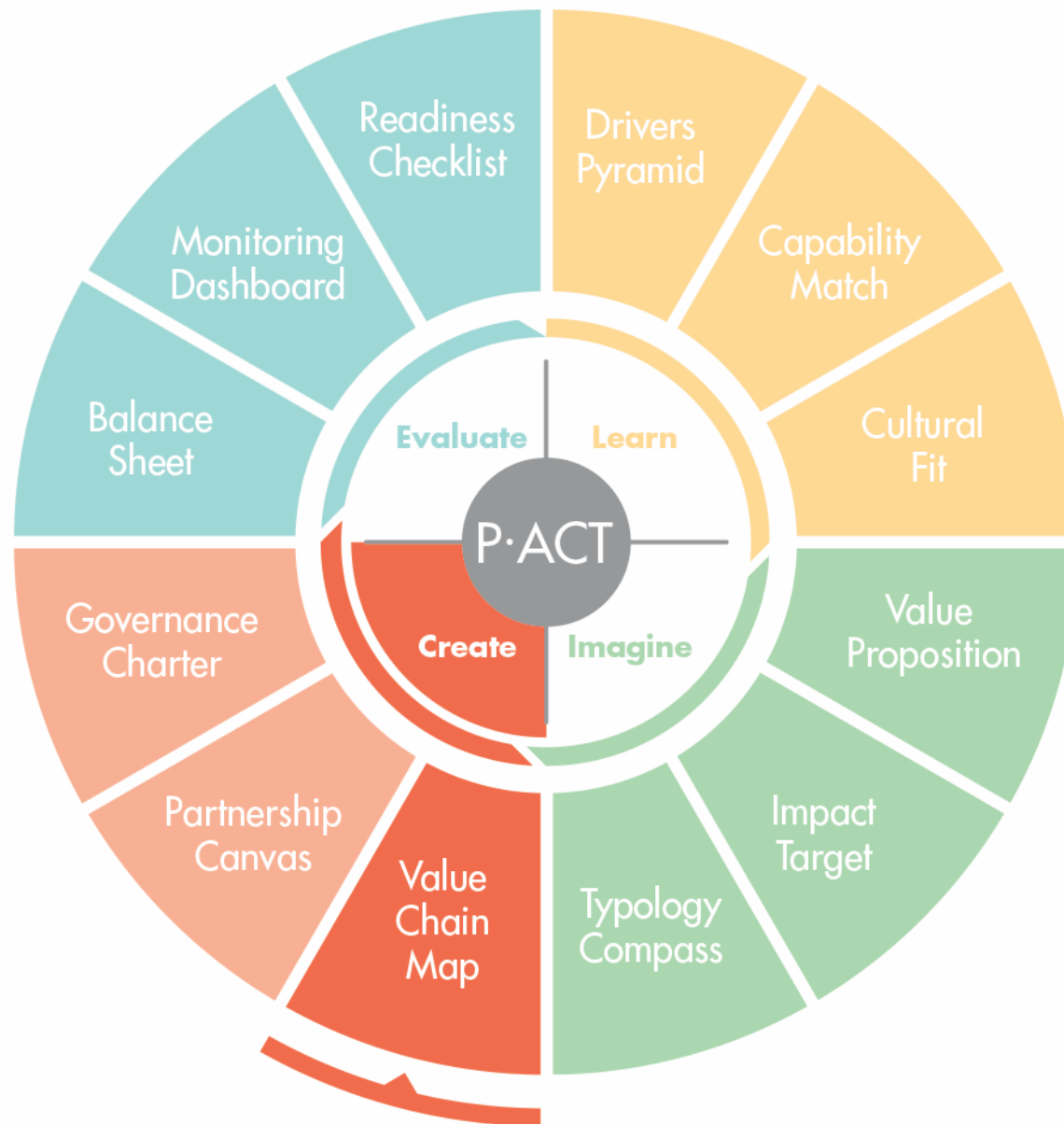
# Value Chain Map

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***How will we  
deliver the value  
proposition of the  
partnership?***

---

P·ACT



**Pre-requisite tools:**  
- Value Proposition

**Next tools:**  
- Partnership Canvas

**How will we deliver  
the value proposition  
of the partnership?**

# Value Chain Map

## **How will we deliver the value proposition of the partnership?**

Partners may make different assumptions about how they will deliver the partnership value to their customers often resulting in misalignment and conflicts. Hence, it is important to clearly define the roles each partner will play in the partnership value chain as it pertains to the flow of products and services, money and information between the different stakeholders. This tool enables partners to converge on a common partnership value chain model and to clarify the activities that each partner is expected to accomplish in order to deliver the partnership value to its customers.

### **Value Chain Map Mural Template**

Tool source:  
Inspired from the [Customer Value Chain Analysis](#)



## **Why should we use it?**

To establish a detailed model for how the partners will deliver the partnership value proposition to their customers.



## **What will we accomplish?**

Clarify the list of key stakeholders taking part in the delivery model

Define each of the partners' roles in the delivery model

Converge on a common delivery model

## **Step-By-Step**

### Step 1

Identify the value chain actors



### Step 2

Map the value chain flows



### Step 3

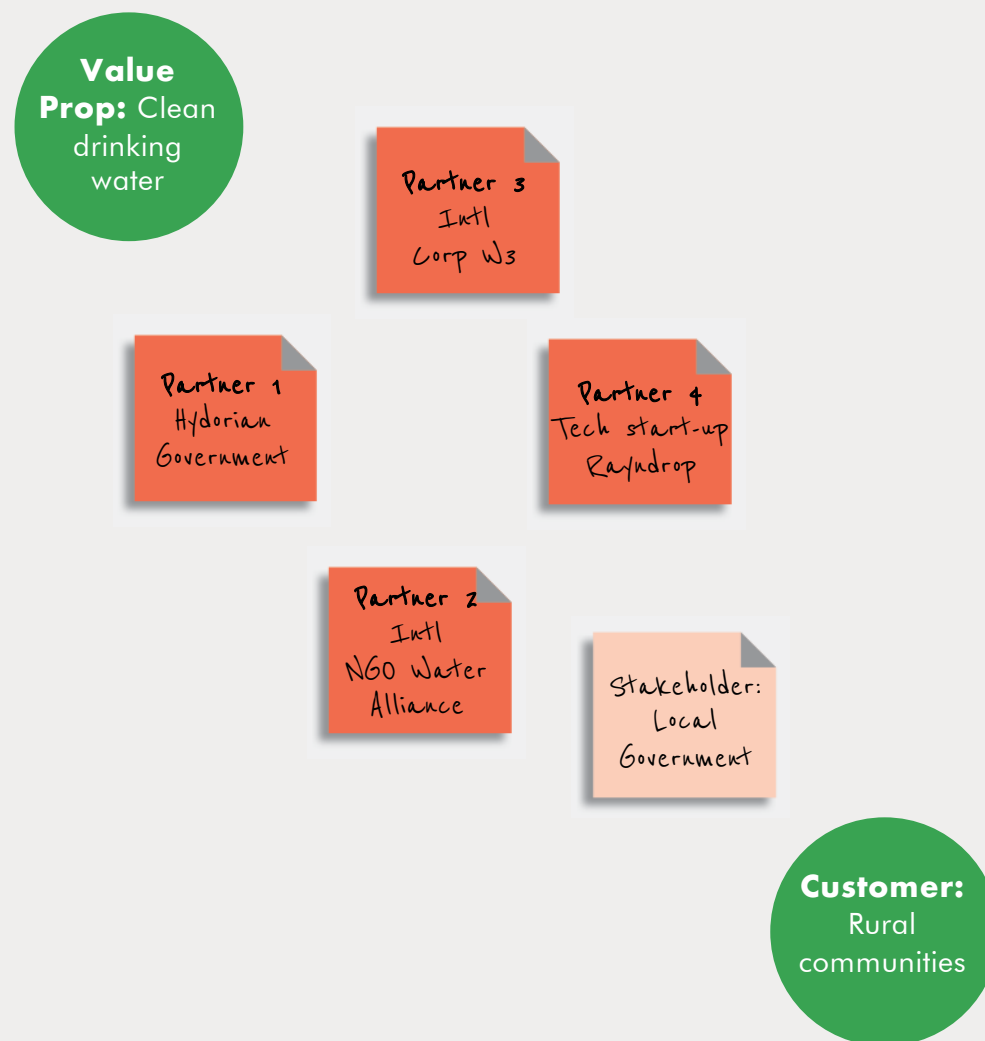
Refine the value chain map

## Step 1:

# Identify the value chain actors

- 1.1** Together, list on post-it notes your target customer group(s), and your partnership value proposition(s). A partnership may have more than one customer group, and each one may receive a different value proposition.
- 1.2** Together, list on different post-it notes each of the key stakeholders who will be involved in the partnership value chain including your own organizations. These should include any individuals or institutions that will have a role to play in the creation or delivery of your partnership value proposition.

Example: Partnership driven by national Hydoria government (Partner 1) bringing together International NGO Water Alliance (Partner 2), multinational water treatment corporation W3 (Partner 3); and tech start-up Rayndrop (Partner 4) to provide safe drinking water to rural communities. (Hydoria Teaching case)



## Step 2:

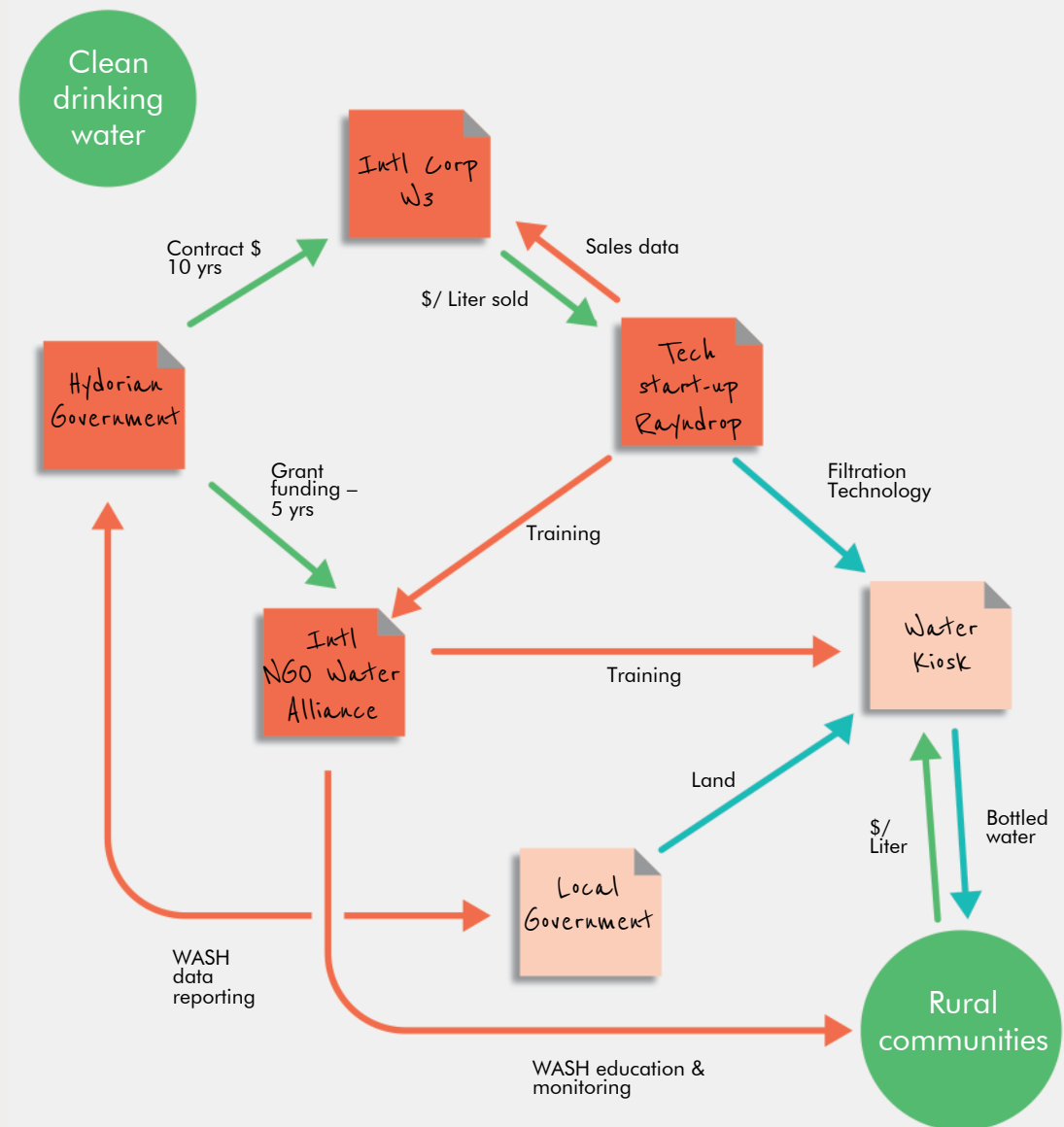
# Map the value chain flows

**2.1** Connect the partnership value proposition with the customers by mapping the flows of **Product / Service**, **Money** and **Information** between the different actors. Use color coded arrows to represent each type of flow.

- **Products/Services:** Physical products or services rendered, installation, maintenance, after sales services...
- **Money:** Income, funding, subsidies...
- **Information:** Training, data, feedback...

**2.2** For each connection, add the unit of measurement and any known specifics about the elements delivered (how much, how often...)

## Value Chain Map



## Step 3:

# Refine the value chain map

**3.1** Use the **4 A's framework** below to evaluate and complete your value chain map with any missing links between the stakeholders.

- **Awareness:** How will your customers know they need your product? How will they know about it?
- **Accessibility:** How and will they access it? How will they know how to use it?
- **Affordability:** How will they pay for it? How will they afford it?
- **After Sale:** How will they assess it? How will they maintain it?

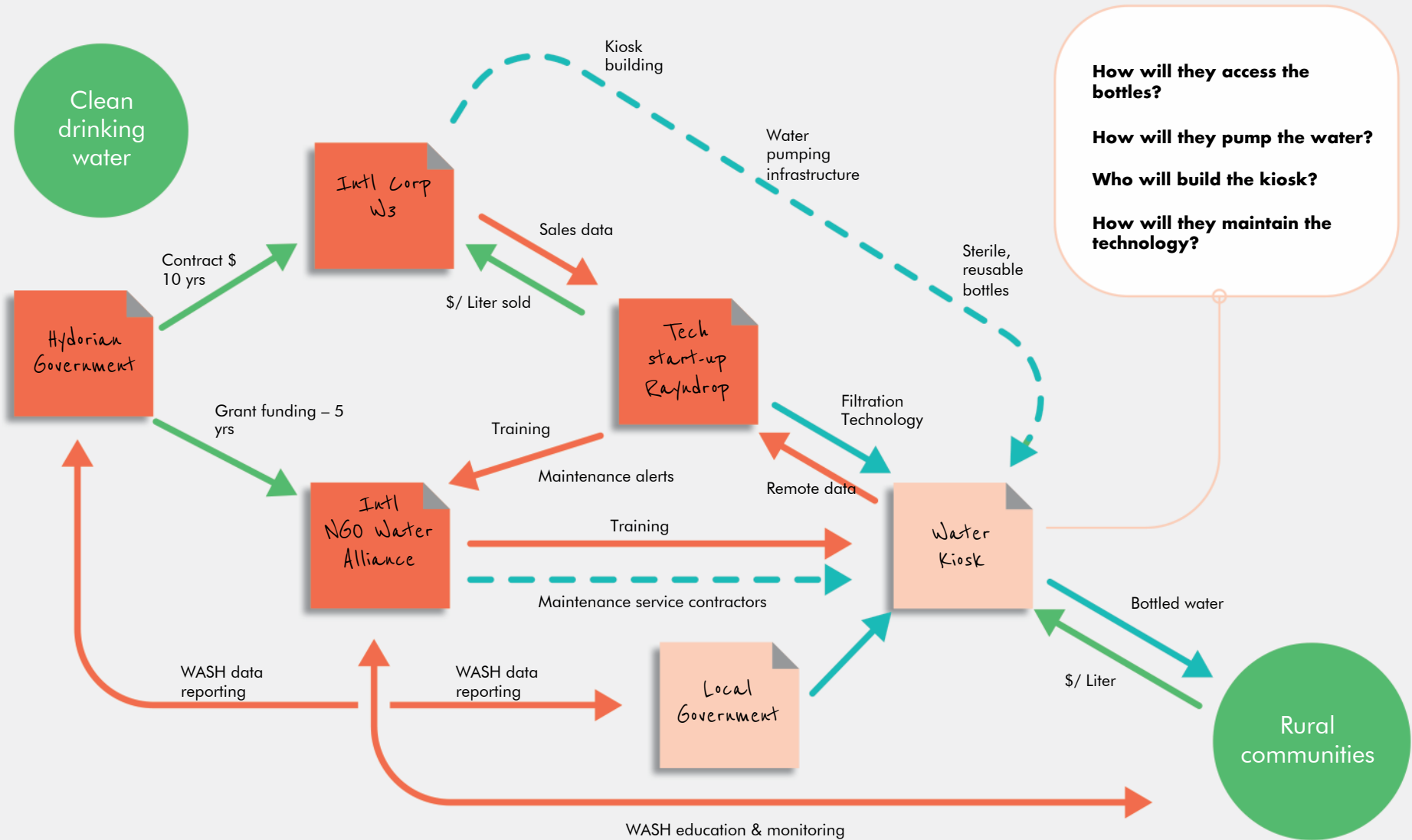
Feel free to add more discussion questions to each category depending on your own partnership context.

**3.2** Once your value chain map is complete, discuss the following questions:

- ? Have we considered all the key stakeholders? Who else might join the value chain down the line? How would that change the map?
- ? Are there enough incentives for each actor in the value chain to sustainably fulfill their function? If not, how can we improve the incentives?
- ? Does the value chain create the value proposition expected by the customer?
- ? Does the value chain generate the impact expected by or promised to the beneficiaries?

Example

# Hydoria Case study





### Step 3:

## Refine the value chain map (continued)

- 3.3** List any open questions, areas of concern or improvement. Identify next steps to begin addressing each item on your list. Set a timeline to follow up on the next steps listed in your action plan.

### Action Plan Table – Example:

<b>Identified open questions or area of improvement</b>	<b>Next steps</b>	<b>Responsible</b>	<b>Timeline</b>
How can we monitor the quality of the bottled water?	Research correlation between water quality and WASH indicators before introducing a quality control function	Rayndrop	Jan 15, 2020
How will the water piping be maintained?	Consult with industrial contractor for recommendations	W3	Jan 30 2020
Can the tech maintenance be done by the kiosk operator in the long term?	Consult community to assess level of qualification and predict level of staff turnover	Water Alliance	Jan 30 2020
How often will technical training be needed	Gather benchmark info and meet with WA technical manager at WA to agree on frequency	Rayndrop	Feb 20 2020
Is the price affordable to community members?	Conduct a small market test	Water Alliance	March 30 2020
Who will pay for the maintenance fees?	Run financial scenarios to establish	All	Feb 15 2020

**Worksheet 1:**

# Action Plan Table

<b>Identified open questions or area of improvement</b>	<b>Next Steps</b>	<b>Responsible</b>	<b>Timeline</b>

# Facilitation tips

---

## Step 1

### **Collective brainstorming**

- Make sure at the start that all partners are aligned on who their customers are and what value proposition they will deliver to them. If needed, use the Value Proposition tool to establish that alignment.

---

## Step 2

### **Collection brainstorming + collective reflection**

- Have participants take turns to add different arrows. Start with one type of flow then move to the other. If certain stakeholders are left out of the map connections, challenge their importance.

---

## Step 3

### **Collection reflection**

- Before closing the meeting, ensure that all partners have strong buy in into the map and the action plan they created together.
- Have the partners set a time and place to follow up on any next steps in the action plan.

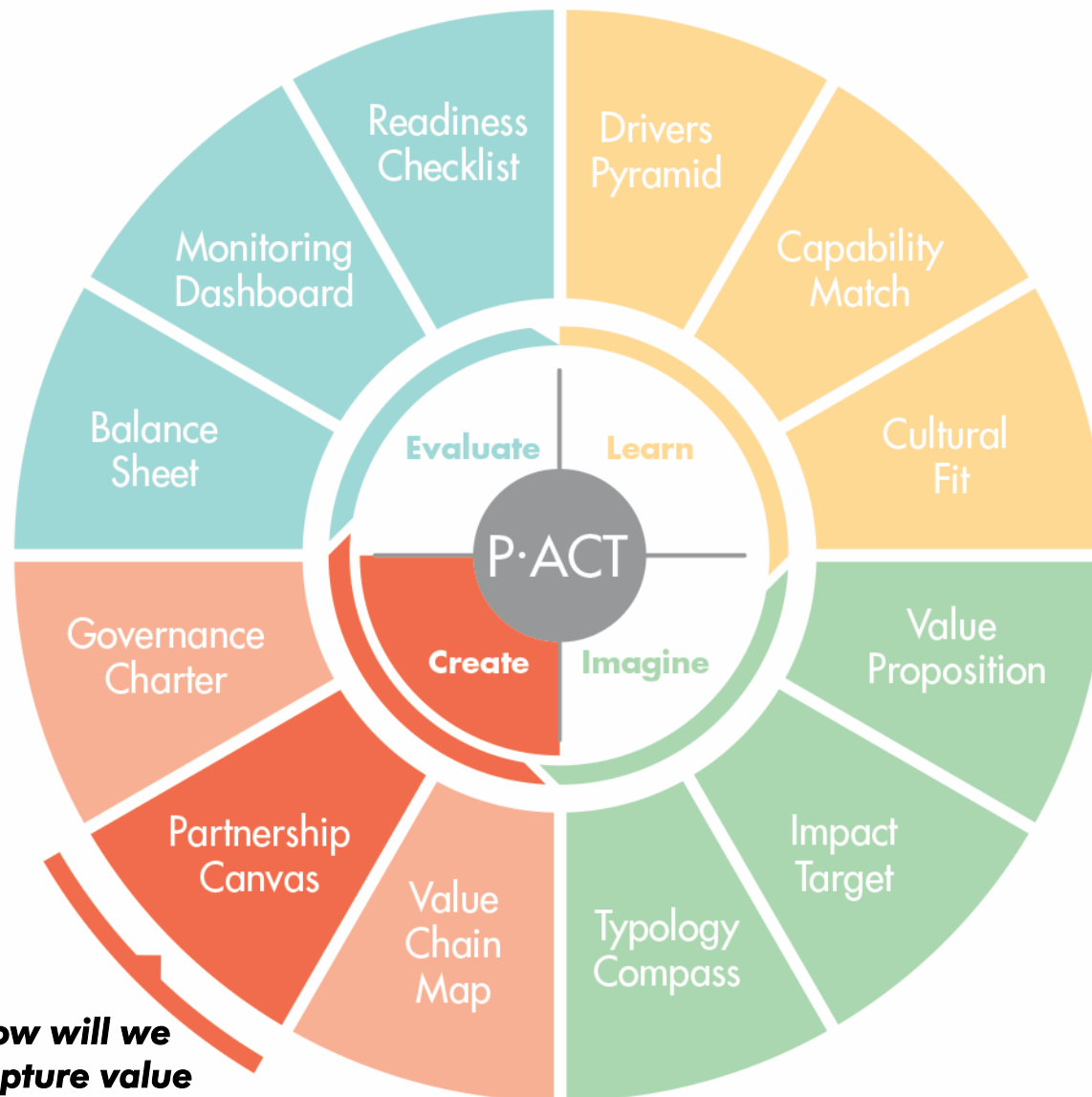
# Partnership Canvas

---

***How will we  
capture value from  
the partnership?***

---

P·ACT



**How will we capture value from the partnership?**

**Pre-requisite tools:**

- Capability Match
- Value Chain Map

**Next tools:**

- Governance Charter
- Balance Sheet

# Partnership Canvas

## *How will we capture value from the partnership?*

Partners need to understand how the collaboration will affect their business model and how it will generate value for their own organization. It is equally important for each partner to be transparent about its understanding and expectations of how its organization will generate value from the partnership. This tool enables partners to clarify these expectations and define the partnership activities that will result in value creation for both partners.

### **Partnership Canvas Mural Template**

Tool source:  
Adapted from the [Partnership Canvas](#)



## **Why should we use it?**

To establish how the partnership will generate value for each partner.



## **What will we accomplish?**

Gain deep understanding of our respective business models and priorities

Agree on what each partner will contribute to and gain from the partnership

Assess how the partnership activities will affect our respective business models

## Step-By-Step

### Step 1

Share  
business  
models and  
priorities



### Step 2

Define  
partnership  
activities



### Step 3

Evaluate  
implications  
on business  
models



## Step 1:

# Share business models and priorities

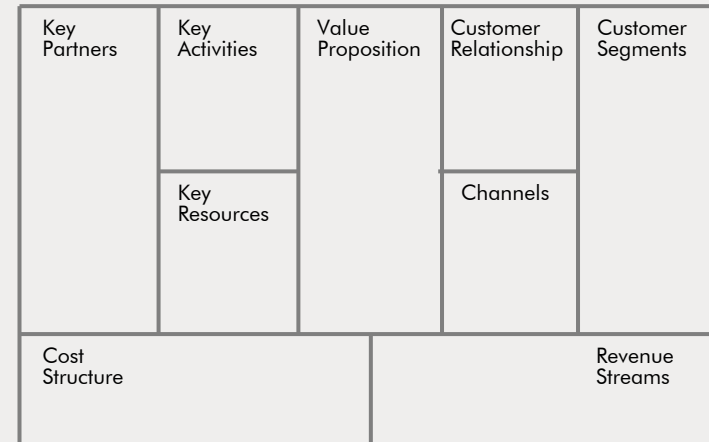
- 1.1** Individually fill in your **Business Model Canvas** (developed by Alex Osterwalder of [Strategizer](#)), then come together and share it with your partner.

For non-business organizations like NGOs or government units, you can still use the Business Model Canvas (BMC) to describe your organisation's revenue and operational model. For a deeper understanding of how the BMC can apply to NGOs and other non-business entities, use the [adapted BMC](#) developed by Bryann Alexandros & Skylance.

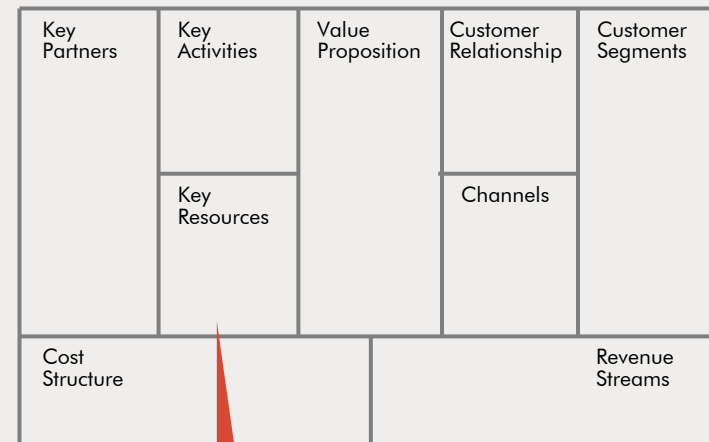
- 1.2** Discuss the following questions to identify and share your priorities:

-  What are your most pressing organizational priorities?
-  How do your priorities relate to your motivations for partnership?

Partner



Us



Example

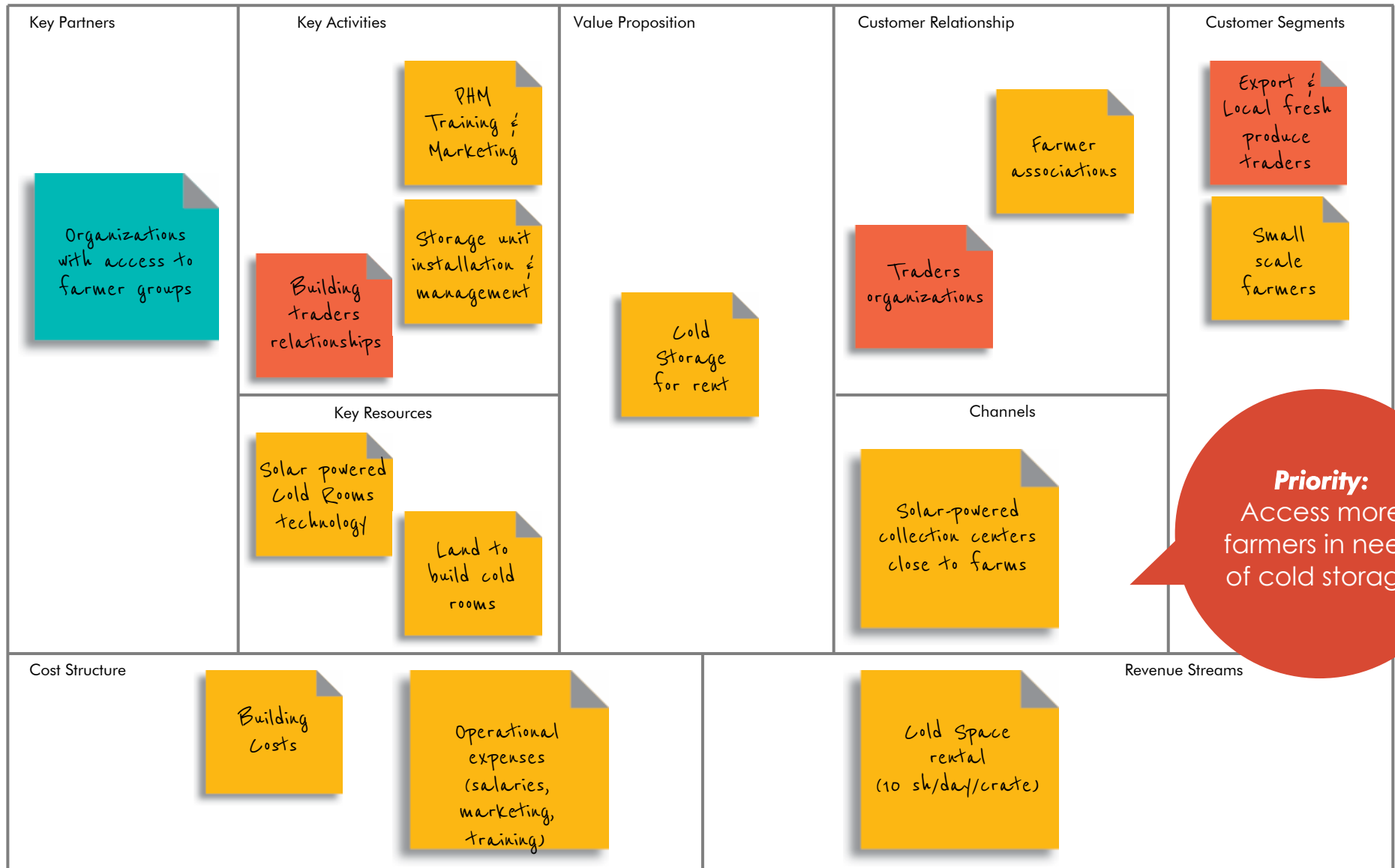
# Solar Freeze

**Partner 1**

Expressions Global: supplies affordable piped water for irrigation to rural smallholder farmers in Kenya.

**Partner 2**

Solar Freeze: Provides renewable energy-powered mobile cold storage units to rural smallholder farmers in Kenya.

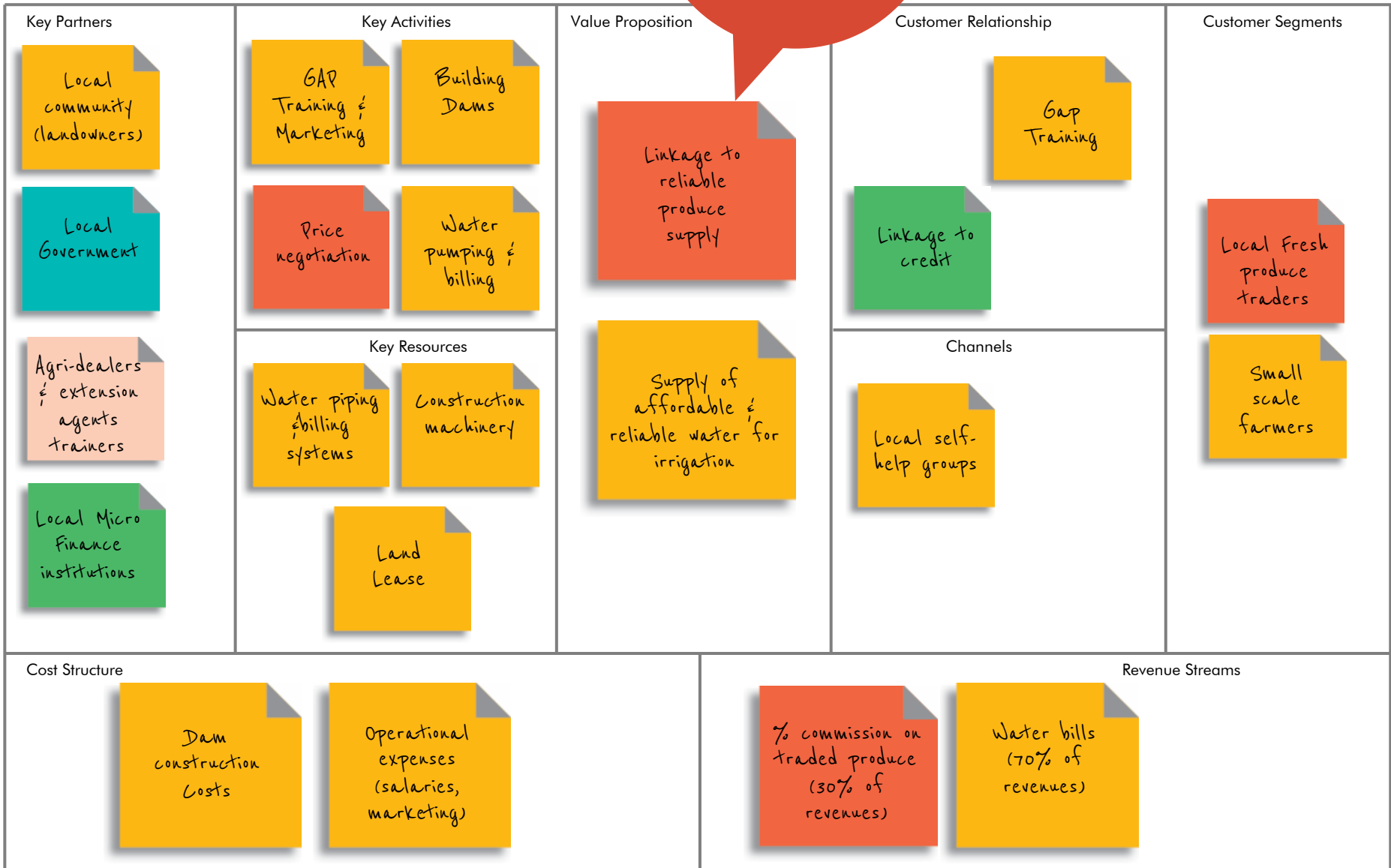




## Example

# Expressions Global

**Priority:**  
Increase the  
volume and  
quality of supply,  
to attract to  
export traders



**Worksheet 1:**

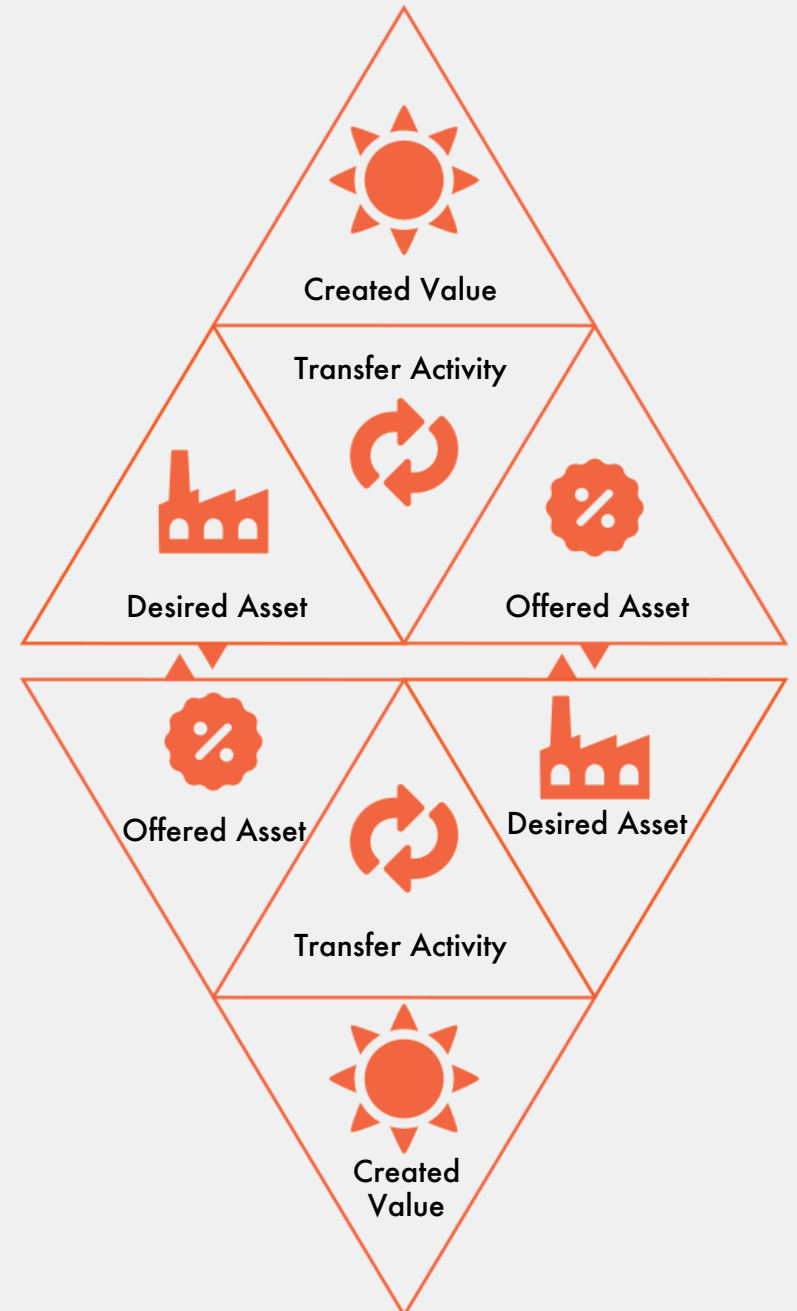
# Business Model Canvas

<b>Key Partners</b>	<b>Key Activities</b>	<b>Value Proposition</b>	<b>Customer Relationship</b>	<b>Customer segments</b>
	<b>Key Resources</b>		<b>Channels</b>	
<b>Cost Structure</b>			<b>Revenue Streams</b>	

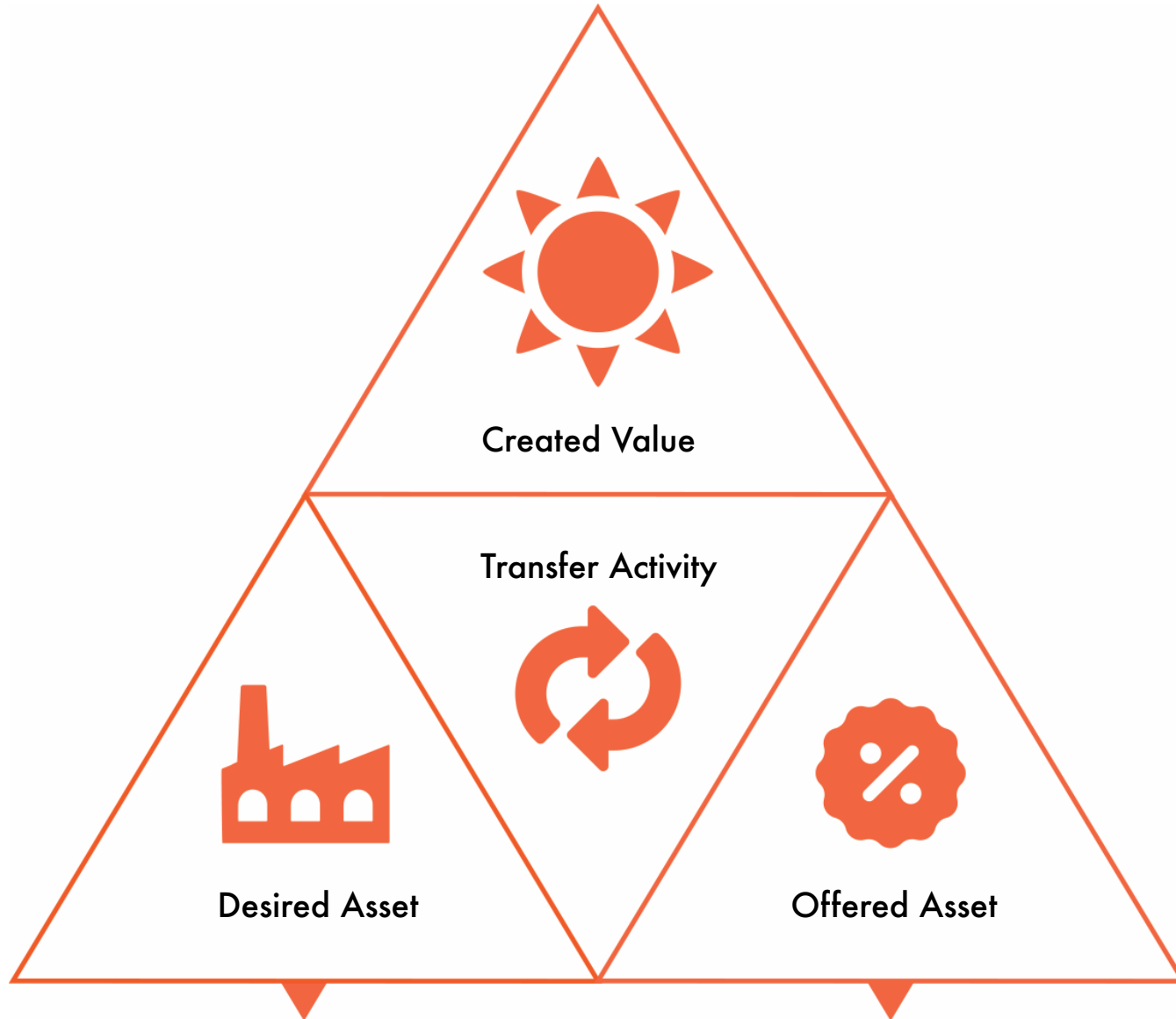
## Step 2:

## Define partnership activities

- 2.1** Individually, fill in the Partnership Canvas from the perspective of your organization:
- **Created Value:** What value do you need to create for your organization? This value should correlate to one of your priority areas.
  - **Desired Asset:** What capabilities or resources do you need from your partner?
  - **Offered Asset:** What capabilities or resources can you offer your partner in exchange?
  - **Transfer Activity:** What activities are needed for the partners to transfer the desired assets to each other? The transfer activities should logically lead to the new value created.
- 2.2** Together, compare canvases, connect, complete and discuss the following questions:
- ❓ Is there a match between what is desired by each partner versus what each partner is willing to offer?
  - ❓ Is there alignment on the value exchange activities?
  - ❓ Are these one-off or limited time exchange activities, or are they recurring?
  - ❓ Does the partnership create important value for each partner?

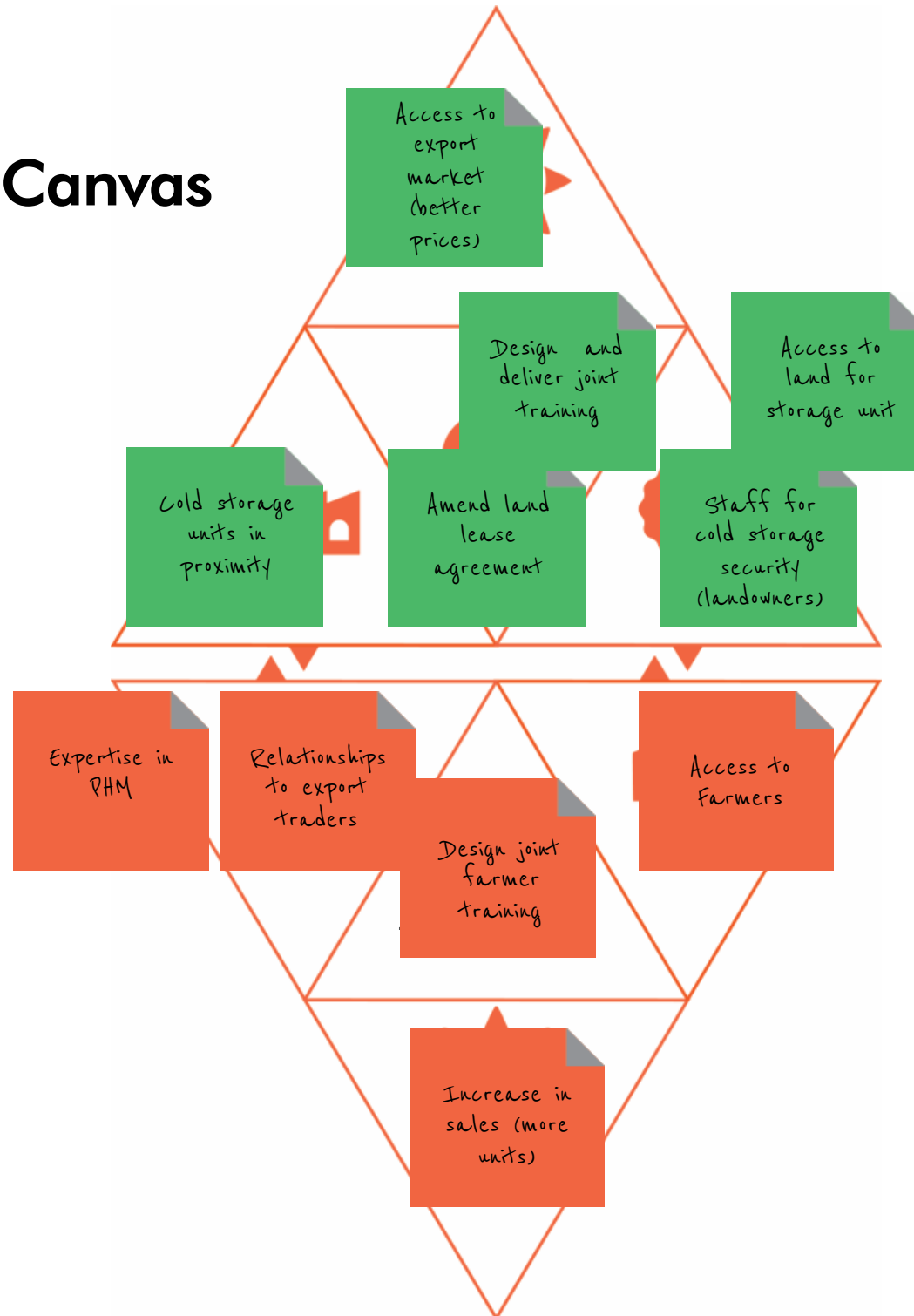


# Partnership Canvas



## Example

# Partnership Canvas



## Partner 1

Expressions Global: supplies affordable piped water for irrigation to rural smallholder farmers in Kenya.

## Partner 2

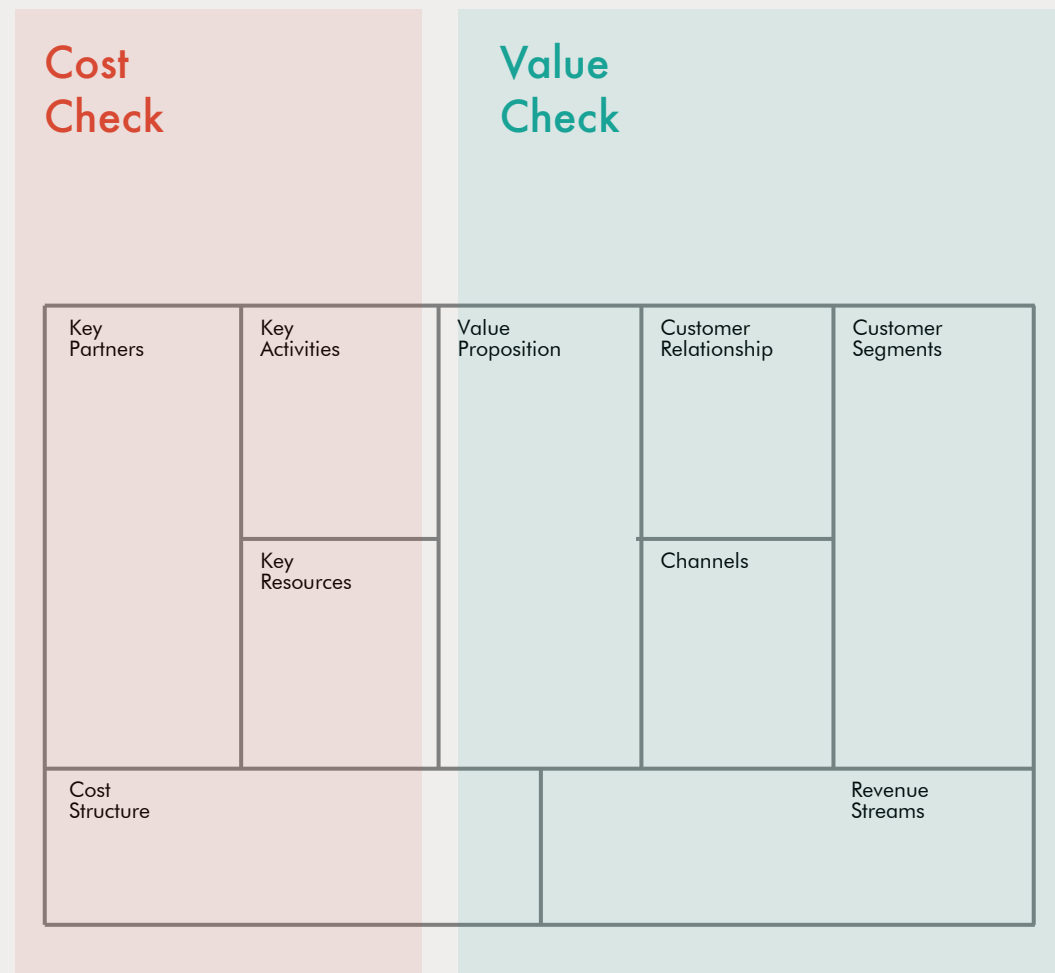
Solar Freeze: Provides renewable energy-powered mobile cold storage units to rural smallholder farmers in Kenya.

[Read more here](#) about the tool application to this case.

## Step 3:

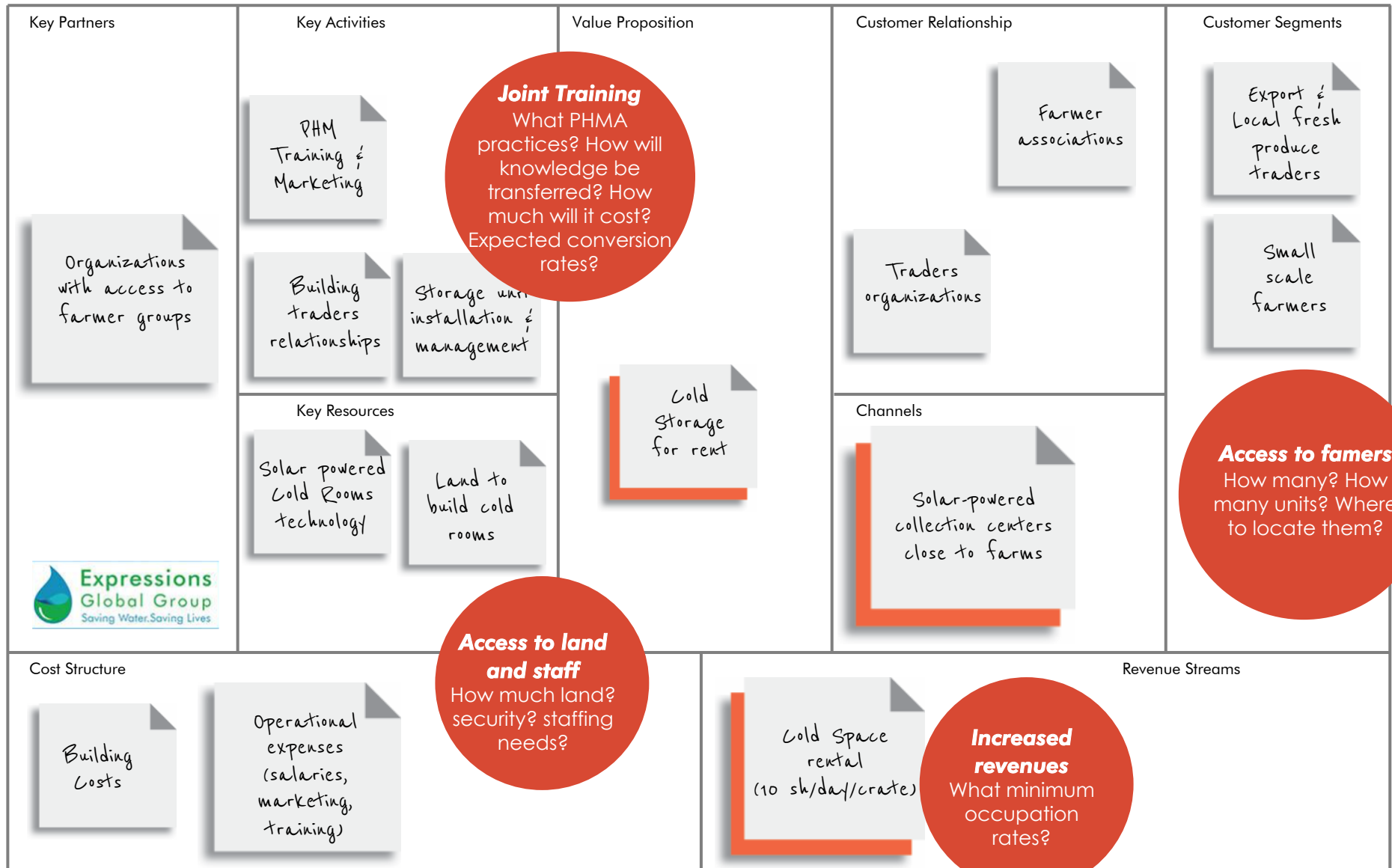
## Evaluate implications on business models

- 3.1** To understand how the partnership activities will affect your respective organizations, go back to your respective BMCs and attempt to integrate the agreed upon exchange activities and the newly captured value. Make a note of any questions that you need to clarify with your partner.
- 3.2** Reflect individually on the implications of these new elements on your organization's BMC.
- **Value check:** How will the value created and accessed assets affect your organization's value proposition and revenue model? (right side of the BMC)
  - **Cost check:** How will the exchange activities affect your organization's activities, resources and cost structures? (left side of the BMC)
- 3.3** Share and discuss these implications together. Document what each partner needs to do to build their capacity in order to engage in the partnership.



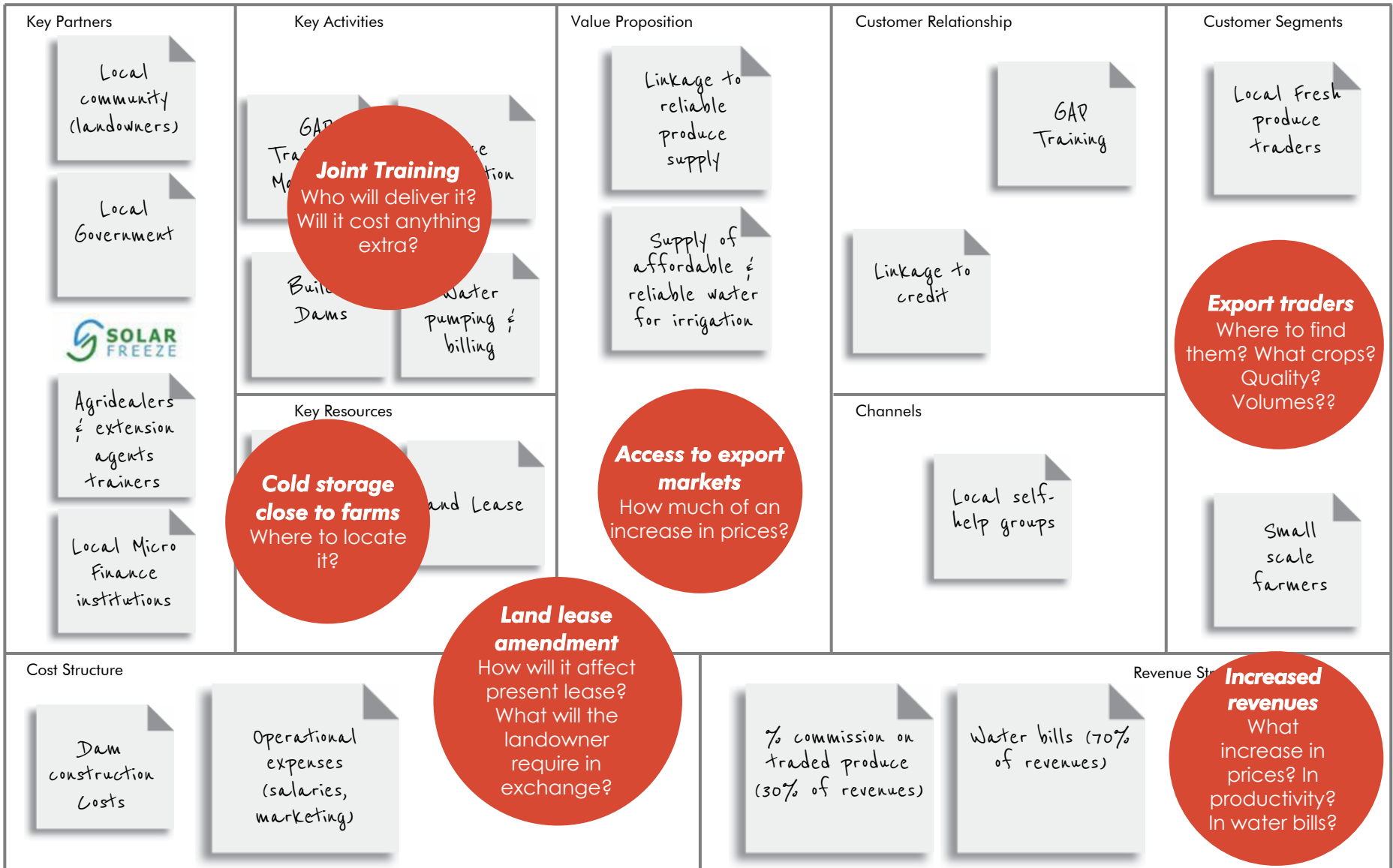
Example

# Solar Freeze



Example

# Expressions Global





# Facilitation tips

## Step 1

### ***Individual brainstorming + Sharing***

- This tool is designed to be used by only two partners. In the case of partnerships involving more partners, consider using it in pairs of partners from within the group.
- If possible, have the partners fill in their BMC in advance of the workshop. Otherwise plan for an extra 20 min to do this individually.
- Encourage partners to ask clarification questions when the BMCs are being presented.
- Point out any similarities in the partners' BMCs or priorities.

## Step 2

### ***Individual brainstorming + Sharing + Collective reflection***

- Print or take a picture of the partnership canvas and give it to each participant to use in future conversations, if needed.

## Step 3

### ***Individual reflection + Sharing + Collective reflection***

- Make sure the partners address all questions on each other's lists.
- Have a few questions from your own analysis ready to prompt constructive dialog and raise important issues.

# Governance Charter

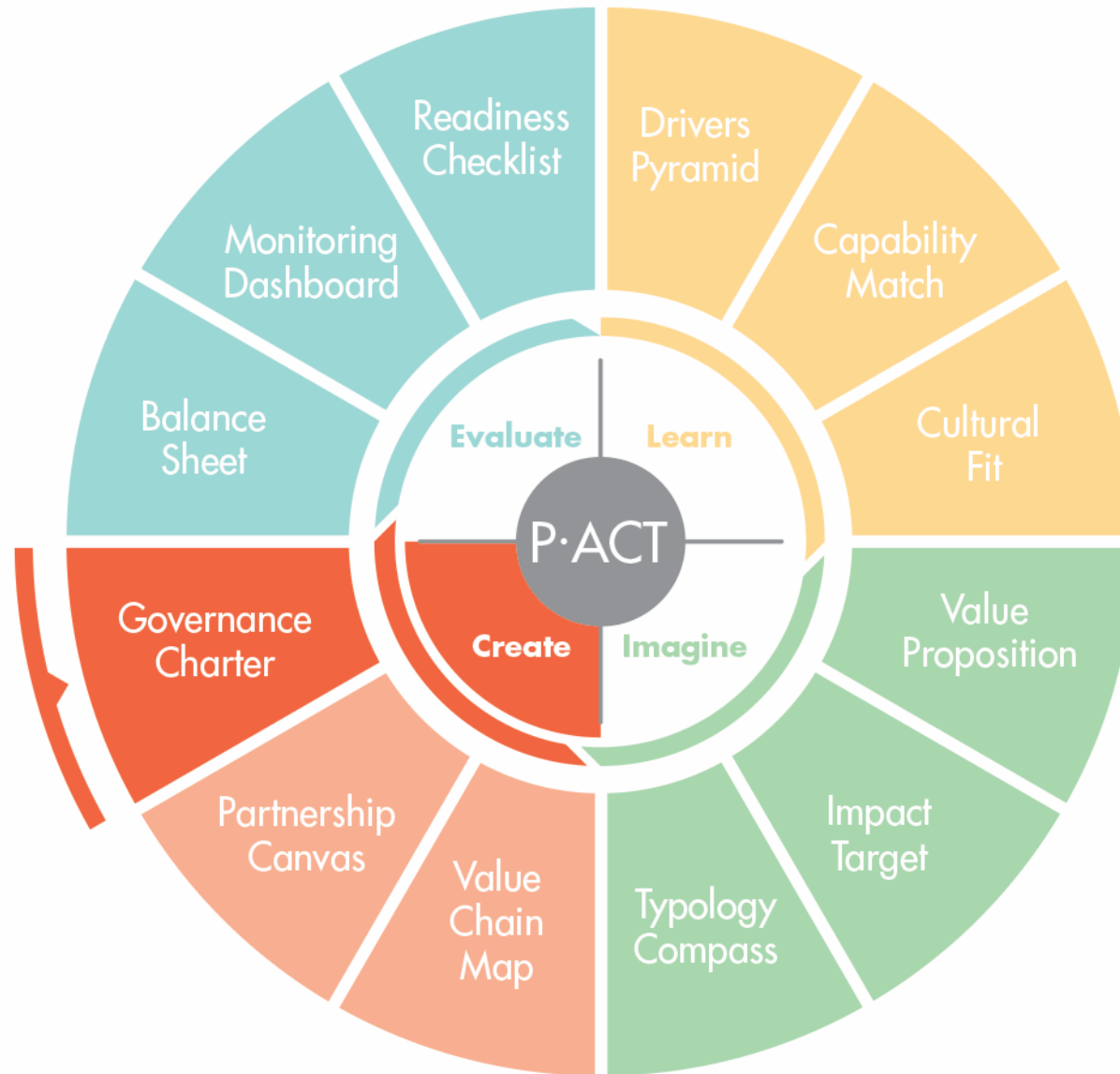
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***How will we  
oversee the  
partnership?***

---

P·ACT





**How will we oversee the partnership?**

- Pre-requisite tools:**
- Cultural Fit
  - Partnership Canvas

- Next tools:**
- Partnership Dashboard

# Governance Charter

## How will we oversee the partnership?

Impact-driven partnerships involve a diverse set of organizations often around complex goals that can take a long time to accomplish. This requires setting a governance structure that ensures the monitoring of the partnership activities over time and a continuous coordination between the partners. This tool enables partners to define the key components of a governance structure for their partnership.

### Governance Charter Mural Template



## Why should we use it?

To establish oversight and coordination processes for the partnership.



## What will we accomplish?

Form a governance board to oversee the partnership progress over time

Establish processes for monitoring the partnership progress

Establish processes for coordinating the work of the governance board

## Step-By-Step

### Step 1

Define governance roles



### Step 2

Define monitoring processes



### Step 3

Define coordination processes

Step 1:

# Align on Governance Roles

The governance board of a partnership includes high level representatives from each partner organization. This group has the mandate to ensure the general oversight of the partnership performance, to make decisions for moving the partnership forward and to address any important challenges or barriers. It can also fulfill other specific functions depending on the partnership context.

**1.1** Discuss and align on the following aspects of the partnership governance board:

- **Board mandate:** WHY does the board exist? What are its overarching goals and objectives for the partnership?
- **Board functions:** WHAT will the board do? What responsibilities and functions will it have? Examples (see example box on the right)

- **Board composition:** WHO should be on the board? What will be each member’s role?

What **skills and capabilities** are required to fulfill the board functions. Examples: Technology expertise, Financial management, sectoral intelligence, government relations...

Do we have the required skills on the board?  
 — Who else should be invited to join the board to fill any gaps? Is the board composition **diverse** (perspectives, gender, ethnic...)?

What **roles** need to be fulfilled for the board management. Example: Chair, co-chair, secretariat... What are the responsibilities of each role and who will fulfill each role?

**Examples of board functions:**

- Monitor performance & risks
- Monitor budget spending and savings
- Ensure internal staff and leadership buy-in
- Negotiate any necessary amendment to established contract
- Make critical resource allocation decisions
- Approve progress to new phases
- Approve important external communications

## Board Composition

Board member	Partner organization	Member Role	<b>Board mandate:</b> WHY does the Board exist? What are its overarching goals and objectives for the partnership?

## Step 2:

## Define monitoring processes

- 2.1** Review your list of governance functions and identify those that will require regular monitoring. For each **monitoring function**, discuss and decide on the **processes and tools** that you will need to develop to monitor and report on the partnership progress. Identify specific tools if they already exist, otherwise discuss a plan to develop these and assign responsibilities.
- 2.2** For each monitoring function, discuss and decide **who from the committee** will be responsible for reporting back to the committee and at **what frequency** will this area be monitored.

### Monitoring Processes

	Processes	Lead member	Frequency
Performance management	How will we ensure that the partnership is progressing successfully towards its KPIs ?		
Risk management	How will we ensure the partnership risks are under control?		
Financial oversight	How will we ensure that the partnership activities are on budget?		
Compliance oversight	How will we ensure that the partnership activities are in compliance with relevant rules and regulations?		

## Step 3:

## Define coordination processes

- 3.1** Beyond monitoring functions, governance boards are often responsible for **general coordination functions** that could benefit from established processes to ensure a consistent and efficient handling when they need to be fulfilled (see *examples in table below*). Discuss and align on the **coordination processes** that you will put in place to ensure success.
- 3.2** Discuss and record any **principles** you consider important for your governance board to abide by. These could relate to mutual values, workstyles and mindsets (see Cultural Fit tool). Make sure to also establish rules specific to the board meetings planning and execution.

### Coordination processes

Internal Communication	How will we share information about the partnership internally within our respective organizations.?	<b>Governance principles:</b> How can we ensure a culture of accountability on the board? How can we create a culture of learning and continuous improvement on the board? How can we ensure a culture of inclusive collaboration on the board? How can we ensure exemplary conduct on the board? How can we ensure that the board work embodies any other shared values by the partners?
Risk management	How will we share information about the partnership externally with other parties?	
Financial oversight	How will we make decisions about the partnership?	
Compliance oversight	How will we resolve conflicts that may arise amongst the partners or with other parties?	

## Worksheet 1:

# Governance Charter (with questions)

## Board Composition

Board member	Partner organization	Member Role	<b>Board mandate:</b> WHY does the Board exist? What are its overarching goals and objectives for the partnership?

## Monitoring Processes

	Processes	Lead member	Frequency
Performance management	How will we ensure that the partnership is progressing successfully towards its KPIs ?		
Risk management	How will we ensure the partnership risks are under control?		
Financial oversight	How will we ensure that the partnership activities are on budget?		
Compliance oversight	How will we ensure that the partnership activities are in compliance with relevant rules and regulations?		

## Coordination processes

Internal Communication	How will we share information about the partnership internally within our respective organizations.?	<b>Governance principles:</b> How can we ensure a culture of accountability on the board? How can we create a culture of learning and continuous improvement on the board? How can we ensure a culture of inclusive collaboration on the board? How can we ensure exemplary conduct on the board? How can we ensure that the board work embodies any other shared values by the partners?
Risk management	How will we share information about the partnership externally with other parties?	
Financial oversight	How will we make decisions about the partnership?	
Compliance oversight	How will we resolve conflicts that may arise amongst the partners or with other parties?	



**Worksheet 1:**

# Governance Charter

## Board Composition

Board Member	Partner Organization	Member Role	Board Mandate:

## Monitoring Processes

	Processes	Lead Member	Frequency
Performance Management			
Risk Management			
Financial Oversight			
Compliance Oversight			

## Coordination Processes

		Governance Principles
Internal Communication		
Risk Management		
Financial Oversight		
Compliance Oversight		

## Example:

# Hydoria

Partnership driven by national Hydoria government (Partner 1) bringing together International NGO Water Alliance (Partner 2), multinational water treatment corporation W3 (Partner3); and tech start-up Rayndrop (Partner 4) to provide safe drinking water to rural communities. (Hydoria Teaching case)

## Board Composition

Board Member	Partner Organization	Member Role	Board Mandate:
John Smith	Water Alliance (NGO)	Co-Chair	Ensure positive progress of partnership towards established goals and resolve any conflicts or obstacles.
Candice Abudeyi	Hydoria Development Ministry (government)	Co-Chair	
Olga Einstein	Rayndrop (tech start-up)	Secretariat	
Roger Black	W3 Inc. (Global utility services corporation)	Treasurer	

## Monitoring Processes

	Processes	Lead Member	Frequency
Performance Management	See Monitoring Dashboard developed by project team	John Smith	Monthly
Risk Management	See Monitoring Dashboard developed by project team	John Smith	Monthly
Financial Oversight	Develop a spreadsheet to monitor financial indicators and spending	Roger Black	Quarterly
Compliance Oversight	External audit report	Candice Abudeyi	Yearly

## Coordination Processes

		Governance Principles
Internal Communication	Respective communication managers will align on message and language guidelines.	<ul style="list-style-type: none"> <li>- Accountability: Schedule bi-yearly community vote by organization leaders and board members</li> <li>- Develop a code of conduct document to share with all board members and project team members (lead: Einstein)</li> <li>- Diversity: Build a project team that has balanced representation of gender on ethnic backgrounds</li> <li>- Teamwork &amp; Learning: Hold bi-yearly team building and reflection retreats mandatory for all partnership team &amp; leadership.</li> </ul>
Risk Management	All internal communication need to be reviewed by communications departments and submitted to review and approval by Board.	
Financial Oversight	We will seek to reach consensus whenever possible and use majority voting when consensus is not possible. Seek community vote if divided.	
Compliance Oversight	Operational conflicts will be submitted to the Board for decision-making. Contractual conflicts will seek third-party arbitration.	

# Facilitation tips

## Step 1

### **Collective reflection**

- Start the session with an ice breaking or mindset activity that helps to set an atmosphere of trust and collaboration between the participants.
- Take the time to set simple ground rules for the meeting. Source these from the group.

## Step 2

### **Collective decision making + Collective definition**

- Ensure that the roles for monitoring are evenly distributed across the group.
- Encourage open discussion of any risk of bias that may exist and how the selected processes will mitigate those risks.

## Step 3

### **Collective decision making + Collective reflection**

- Suggest functions but let the partners decide. Some aspects are more important to certain partnerships than to others depending on the nature of the actors, the partnership activities and scope.
- Have the group reflect on the final charter and make any final amendments.
- Ensure that you have buy-in from all members of the group on the charter before closing.
- Have the group move to action by setting the date for their first meeting.

# Balance Sheet

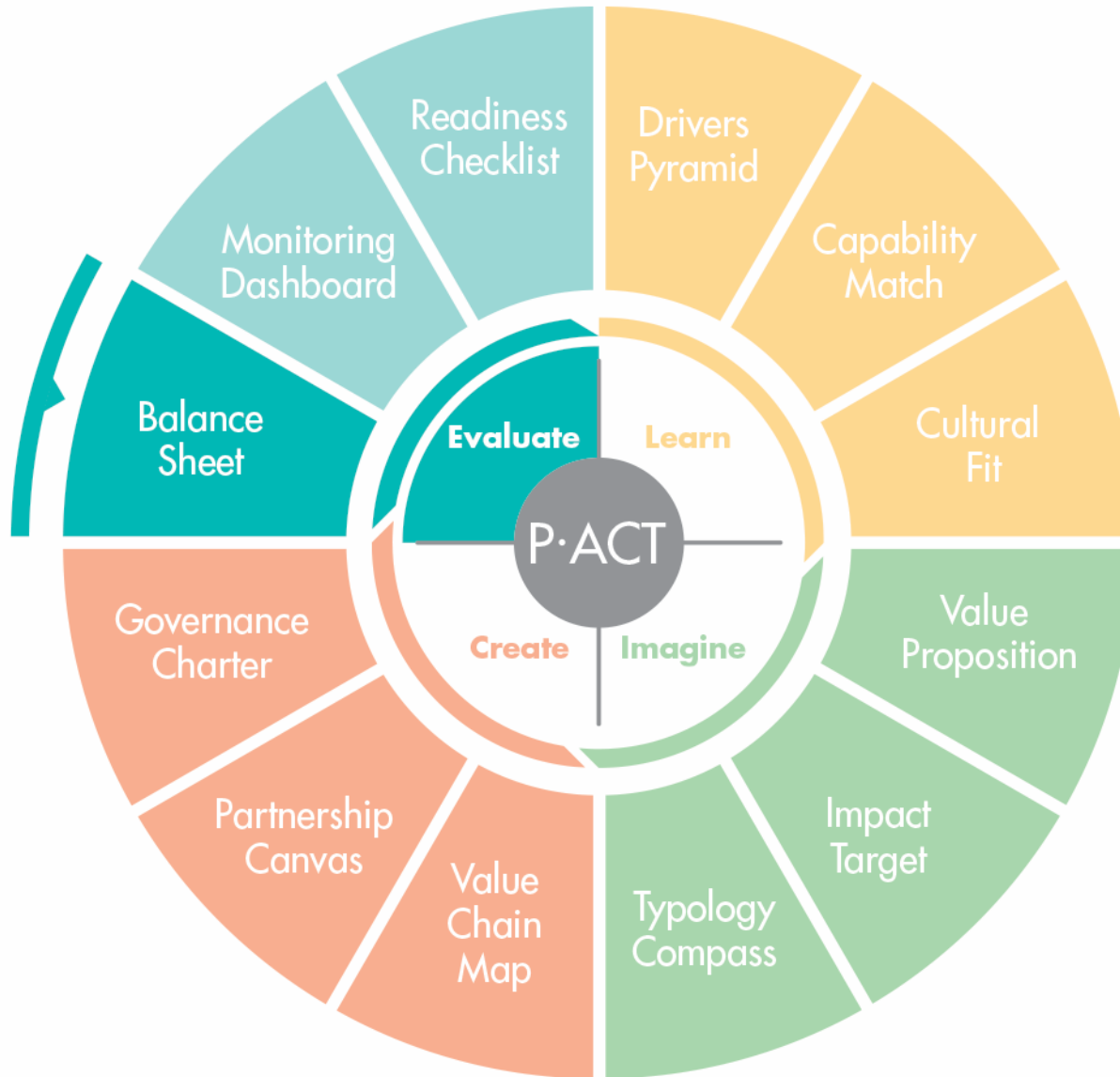
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***How much value and cost will we capture/incur?***

---

P·ACT

**How much value and cost will we capture / incur?**



**Pre-requisite tools:**  
- Value Chain Map  
- Partnership Canvas

**Next tools:**  
- Partnership Dashboard

# Balance Sheet

## How much value and cost will we capture / incur?

Partnerships generate value but they also engender additional costs. A key to partnership success is for all partners to be satisfied with their return on investment, and feel that the distribution of value and costs is relatively balanced amongst all. This tool enables partners to assess the value they capture from the partnership versus the costs they incur, and to discuss openly the distribution of value and costs amongst them.

### BalanceSheet Mural Template



## Why should we use it?

To evaluate and compare the return from the partnership to each partner.



## What will we accomplish?

Gain clarity on the value and costs of the partnership to each partner

Identify areas for negotiation or improvement

Build our confidence in the return on investment from the partnership

## Step-By-Step

### Step 1

Define value and cost elements



### Step 2

Compare value versus cost



### Step 3

Discuss value & costs distribution

## Step 1:

# Evaluate value and cost elements

**1.1** The tool suggests a framework to evaluate value and costs in six areas. For each area, work individually to identify the VALUE and COST elements that are most relevant to your organization.

- **Customer:** What will be the value and cost to our customers?
- **Market:** What market access or advantage will we gain or lose?
- **Financial:** What financial gains or expenditures will we make?
- **Capacity:** What gains or losses will we see in our organizational capacity?
- **Relational:** What gains or risks will it bring to our existing or future relationships?
- **Social Impact:** What changes will we observe in our social impact?

**1.2** For each element, fill in individually the spreadsheet with:

**WHAT?** Describe concretely the value / cost expected from the partnership in this area

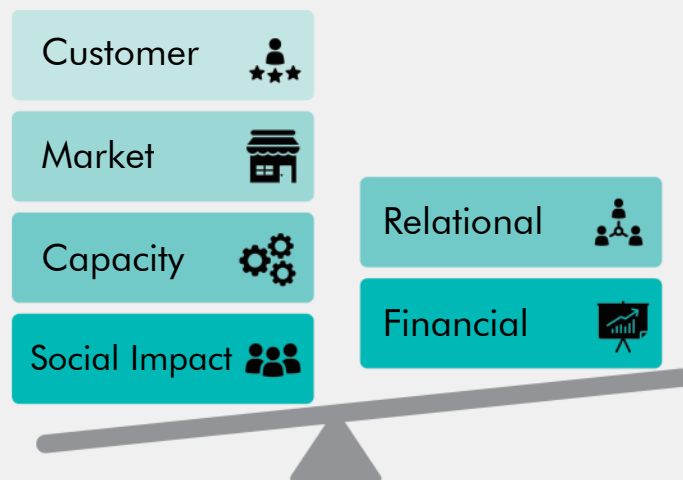
**HOW MUCH?** Input whenever possible, the amount of value / cost expected to gain from this partnership.

**HOW CRITICAL?** Assess how critical this value or cost is to your organization?

**HOW LIKELY?** Assess how likely it is for this value or cost to materialize?

## Value

## Cost












## Step 2:

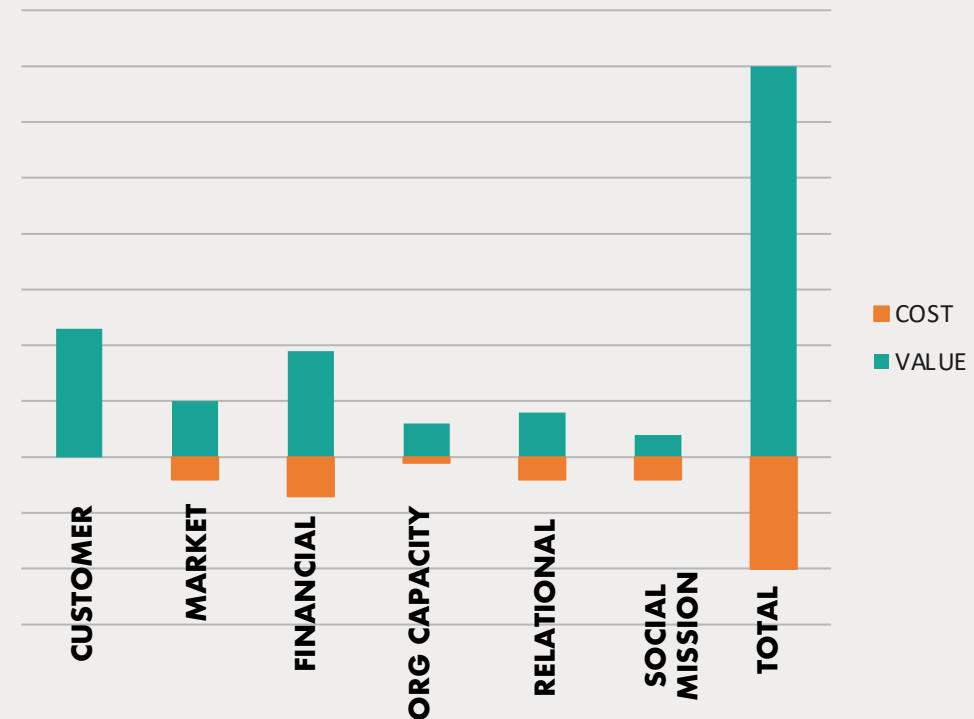
# Compare value versus cost

## 2.1 Examine individually your **Value versus Cost chart** and reflect on the following questions:

-  Where does most of the value come from? Where does most of the cost come from?
-  Are certain elements of value of cost of different temporal nature (short, medium, long term)?
-  Does the value outweigh the cost for your organization?
-  What value element could your organization eventually achieve alone?
-  Does the incremental value still justify the cost?

Record your answers and observations.

Example: This is a partnership between tech start-up [ClinicPesa](#) that provides an mobile based saving and credit platform for medical expenses, with two partners: a national Telecom provider in Uganda (**PARTNER 1**) and a national commercial bank (**PARTNER 2**)



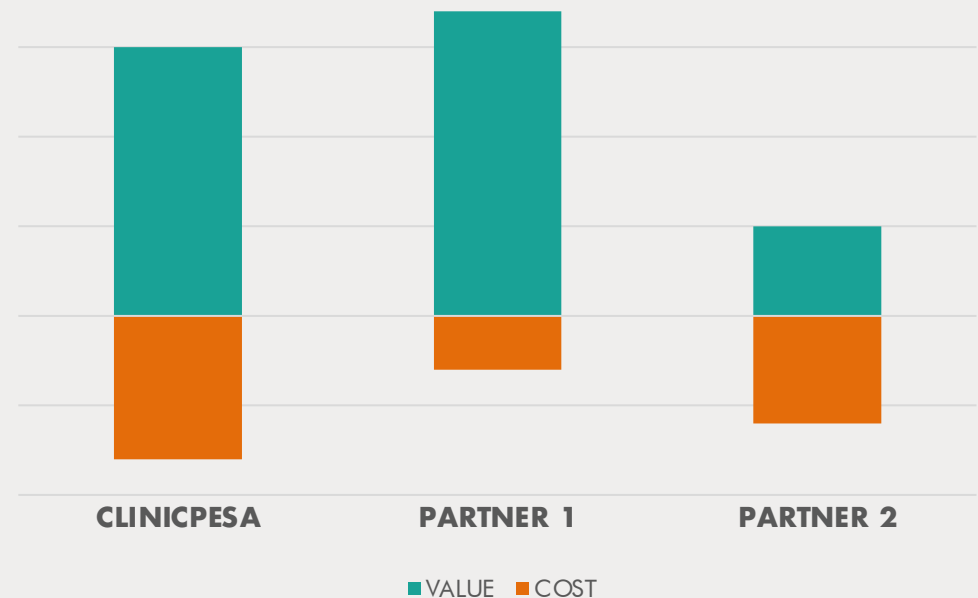
## Step 3:

## Discuss value and costs distribution

- 3.1** Share your chart with your partners and explain your observations.
- 3.2** Together, review the comparison chart and reflect on the following questions
- ❓ What are the key elements of Value and Cost for each partner?
  - ❓ Does the Value outweigh the Cost for each partner?
  - ❓ How evenly balanced is the distribution of Value and Costs across the partners? Are there opportunities to improve on that?
  - ❓ Are there opportunities to work together on increasing value or reducing costs for any of the partners?

Record your answers and observations.

Example: This is a partnership between tech start-up [ClinicPesa](#) that provides an mobile based saving and credit platform for medical expenses, with two partners: a national Telecom provider in Uganda (**PARTNER 1**) and a national commercial bank (**PARTNER 2**)



# Facilitation Notes

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## Step 1 *Individual brainstorming*

- If you can, explain and share the spreadsheet with the partners to fill in the information individually in advance of the workshop.
- At the beginning of the workshop take a few minutes to review the definition of each component of the framework and ensure that all partners have the same understanding.

## Step 2 *Individual self- assessment*

- Remind partners that the tool uses a qualitative measurement of VALUE and COST. It is most useful for comparative purposes and not to be used for absolute measurement of value and costs.

## Step 3 *Collective reflection*

- If the partners filled in the same spreadsheet, the tool can automatically compute and chart a comparative chart for the partners. Alternatively you can place their charts side by side and compare them.
- Before closing, make sure that any agreed upon decisions or actions are recorded and shared amongst all partners.

# Monitoring Dashboard

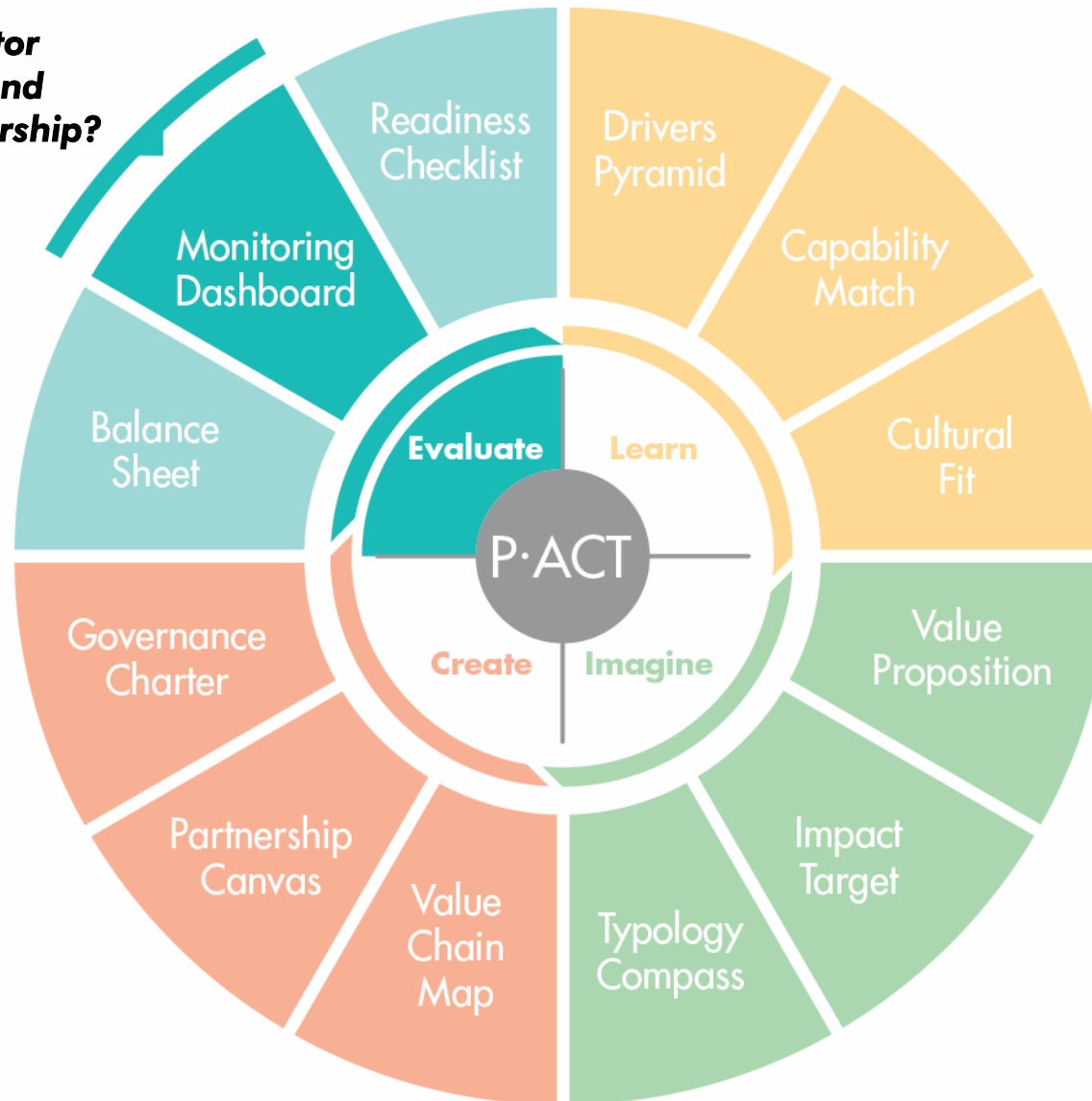
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***How will we  
monitor the  
performance and  
risks of our  
partnership?***

---

P·ACT

**How will we monitor the performance and risks of our partnership?**



**Pre-requisite tools:**

- Impact Target
- Partnership Canvas
- Balance Sheet

**Next tools:**

- Readiness Checklist

# Monitoring Dashboard

## How will we monitor the performance and risks of our partnership?

Impact-driven partnerships are complex and dynamic, often spanning several months or years within evolving contexts. Partners need to develop a process to continuously ensure that the partnership is progressing positively towards its goals and to anticipate any potential challenges or obstacles before they arise and act accordingly to mitigate them. This tool enables partners to develop a monitoring framework that will enable them to drive the partnership towards its goals.

### Monitoring Dashboard Mural Template

Tool source:  
Inspired from SEED tool *Performance Monitoring (not public)*



## Why should we use it?

To monitor partnership performance and risks, and drive the partnership towards its goals.



## What will we accomplish?

Identify partnership key performance indicators (KPIs), and develop baselines, targets and set a plan for necessary actions

Identify partnership key risk indicators (KRIs), and set baselines, thresholds and set plan for necessary actions

## Step-By-Step

### Step 1

Define key performance indicators & targets



### Step 2

Define key risk indicators & thresholds



### Step 3

Test & refine the Monitoring Dashboard

# Monitoring Framework

The evaluation framework proposed in this tool assesses the performance and risk of partnerships in six areas.

- **Customer value:** Is the partnership creating its intended value for the customer?
- **Partnership impact:** Is the partnership creating its intended impact for the beneficiaries?
- **Partner value:** Are the partners capturing the expected value from the partnership?
- **Partnership costs:** Are the partnership costs within expected levels for each partner?
- **Partnership activities:** Are the partnership activities advancing according to plan?
- **Partner relationship:** Is the relationship between the partners healthy?

The output of this tool is a holistic diagnosis of the partnership overall, as well as a specific action plan to drive the partnership between reviews.



**Customer Value**



**Partnership Impact**



**Partner Value**



**Partner Cost**



**Partnership Activities**



**Partner Relationship**

## Step 1:

# Define key performance indicators & targets

- 1.1** Together, discuss and define what would success mean for each section of the Monitoring Framework. Consider both **quantitative and qualitative** success definitions. Sometimes partners tend to focus on easily quantifiable factors and ignore important though less easily quantifiable qualitative factors.
- 1.2** Brainstorm together **SMART KPIs** you will use to monitor the performance of your partnership. The KPIs list should be comprehensive but actionable, focusing on the top 2-5 indicators that are most important and would best inform decisions.
- 1.3** For each KPI, identify the **target** you want to reach and clarify the **timeframe**, the **unit of measure** and how the data will be collected.
- On the first time you establish the Dashboard, record the “As is” status for each KPI. This will establish your **baseline**.
  - Every time you update the Dashboard, record the status of each KPI. Compare to your baseline and target and discuss decisions to be made or actions to be taken.





Click on the link to access the [spreadsheet](#):

# KPI Definition Worksheet

Performance Area	KPI-Indicator	Unit of Measure	Source of Data	Target Value	Target date	Baseline	Baseline date
<b>Customer Value</b> How will we verify that the partnership is delivering value for its customers?							
<b>Impact</b> How will we verify that the partnership is generating impact for its beneficiaries?							
<b>Partner Value</b> How will we verify that the partners are capturing value from the partnership?							
<b>Partnership Costs</b> How will we verify that the partnership costs are within expected levels for each partner?							
<b>Partnership Activities</b> How will we verify that the partnership activities are advancing to plan?							
<b>Partners Relationship</b> How will we verify that the relationship between the partners is positive?							

## Example

Example: This is a partnership between [ClinicPesa](#), a tech start-up that provides an mobile based saving and credit platform for medical expenses and a national Telecom provider in Uganda.

# KPI Definition Worksheet

See more detailed indicators in [spreadsheet](#):



Performance Area	KPI-Indicator	Unit of Measure	Source of Data	Target Value	Target date	Baseline	Baseline date
<b>Customer Value</b>							
Access to credit	# customers who qualified for credit	# to-date	clinicPesa transaction and Mobile Money Data				
	# customers who received credit	# to-date	clinicPesa data				
	Average credit per customer	monthly average	clinicPesa data				
<b>Partner Value</b>							
Revenue Growth	\$ in revenue margins from clinicPesa	\$ /month	clinicPesa data				
	\$ in revenue margins from new & reactivated customers	\$ /month	Telecom data				
<b>Partnership Costs</b>							
Market activation cost	\$ amount to create awareness	\$ /year	clinicPesa/ Telecom data				
<b>Partnership Activities</b>							
Attracting right customers	% of customer qualified vs total customers	# /month	clinicPesa/ Telecom data				

## Step 2:

## Define key risk indicators & thresholds

**2.1** Together, discuss any **risks** that might stifle the partnership success in each area of the evaluation framework. Consider both internal and external risks. Focus on the risks that are most critical to the partnership and likely to materialize.

**2.2** For each risk factor, brainstorm collectively **SMART KRIs** you will use to monitor the risk of your partnership. The list should be comprehensive but actionable, focusing on the top 2-5 indicators that are most important and would best inform decisions.

**2.3** For each KRI, identify your thresholds (level of risk you want to stay below) and clarify the timeframe, the unit of measure, and how the data will be collected.

- On the first time you establish the dashboard, record the “As is” status for each KRI. This will establish your baseline.

- Every time you update the Dashboard, record the status of each KRI. Compare to your baseline and target and discuss decisions to be made or actions to be taken.

### **Internal risks**

Internal risks are risks that are within the control of the partners. They generally relate to the partners’ capacity to execute on the partnership activities

### **External risks**

External risks are risks that are beyond the control of the partners. Such risks are generally more difficult to predict and manage than internal risks.

#### **Internal Risks**

- Team
- Organisation
- Knowledge
- Financial
- Operational

#### **External Risks**

- Political
- Economic
- Social
- Technological
- Legal
- Environmental



Click on the link to access the [spreadsheet](#):

# KRI Definition Worksheet

Performance Area	KRI-Indicator	Unit of Measure	Source of Data	Target Value	Target date	Baseline	Baseline date
<b>Customer Value</b> How can we track risks that could prevent the partnership from delivering value for its customers?							
<b>Impact</b> How can we track risks that could prevent the partnership from generating impact for its beneficiaries?							
<b>Partner Value</b> How can we track risks that could prevent the partners from capturing value from the partnership?							
<b>Partnership Costs</b> How can we track risks that could push partnership costs beyond expected levels for each partner?							
<b>Partnership Activities</b> How can we track risks that could prevent the partnership activities from advancing to plan?							
<b>Partners Relationship</b> How can we track risks that could damage the relationship between the partners?							

## Example

# KRI Definition Worksheet

Example: This is a partnership between [ClinicPesa](#), a tech start-up that provides an mobile based saving and credit platform for medical expenses and a national Telecom provider in Uganda.

See more detailed indicators in [spreadsheet](#):










Performance Area	KRI-Indicator	Unit of Measure	Source of Data	Target Value	Target date	Baseline	Baseline date
<b>Customer Value</b>							
<i>If customers are over indebted</i>	<i># customers defaulting</i>	<i>#</i>	<i>clinicPesa loans + repayments</i>				
<i>If demand for usage exceeds clinicPesa's capacity to onboard provider outlets</i>	<i># of regions with customers and without onboarded provider outlets</i>	<i>#</i>	<i>clinicPesa Outlet mappings per region</i>				
<b>Partner Value</b>							
<i>If customers growth is slow</i>	<i># new customer due to clinicPesa</i>	<i># /month</i>	<i>Telecom system and clinicPesa System data</i>				
<i>If savings volumes are low</i>	<i>\$ saved per customer</i>	<i>\$ /month</i>	<i>clinicPesa System</i>				
<b>Partnership Costs</b>							
<i>If Telecom introduces transaction cost per saved amount</i>	<i>rate charged per saving</i>	<i>\$ /transaction</i>	<i>clinicPesa and Telecom system data</i>				
<b>Partnership Activities</b>							
<i>If Telecom removes the Auto loan recovery flags</i>	<i># loans without recovery flags</i>	<i># /month</i>	<i>clinicPesa and Telecom system data.</i>				
<b>Partners' Relationship</b>							
<i>If clinicPesa onboards undocumented account on its platform.</i>	<i># undocumented customer accounts</i>	<i>#</i>	<i>clinicPesa and Telecom system data.</i>				

### Step 3:

# Test and refine the Monitoring Dashboard

A monitoring dashboard is just as useful as the decisions and actions that it enables the partners to make in order to keep the partnership on track towards its goals. And while new KPIs and KRIs can be added during the partnership lifetime, it is important to maintain consistency in using the same indicators over the lifetime of the partnership. This enables partners to drive the partnership with more certainty and to report coherent data about its progress. Consequently, before operationalizing your Monitoring Dashboard, it is important to test it and ensure that you have designed a tool that will serve you and your partners effectively for critical decision-making.

- 3.1** Before finalizing your dashboard, reflect together on the following questions and make any necessary adjustments:
-  Are the status data accessible and easy to collect?
  -  Do the KPIs provide a comprehensive read on the partnership performance?
  -  Do the KRIs provide a comprehensive read on the partnership risk?
  -  Will your indicators enable you to make decisions or take actions for the improvement of your partnership success?
  -  Are your targets / thresholds realistic in the timeframe established?
  -  How often will you update and review your dashboard?
  -  Who will be responsible for collecting the data?  
Who will participate in the review and decision making?

# Facilitation Tips

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## Step 1 and 2 **Collective brainstorming + Collective definition**

- If participants struggle to align on KPIs, they can review the outputs of prerequisite tools as dashboard inputs.
- The most complex part is defining the specific measurement details (e.g. absolute numbers, percentages, growth rates; or what to count in e.g. who is considered as permanent staff or successful training graduate?). Working out various alternatives before deciding on the best fit for each KPI/KRI will help. From final descriptions, anyone outside the current working group should be able to clearly understand how to go out and get the right figures.
- Make sure to reach complete consensus in each area of the KPIs/ before moving forward.

## Step 3 **Collective reflection**

- Make sure that data collection, processing and review responsibilities are well identified and assigned.
- Link the tool output to the governance tool if the group has used it.

# Readiness Checklist

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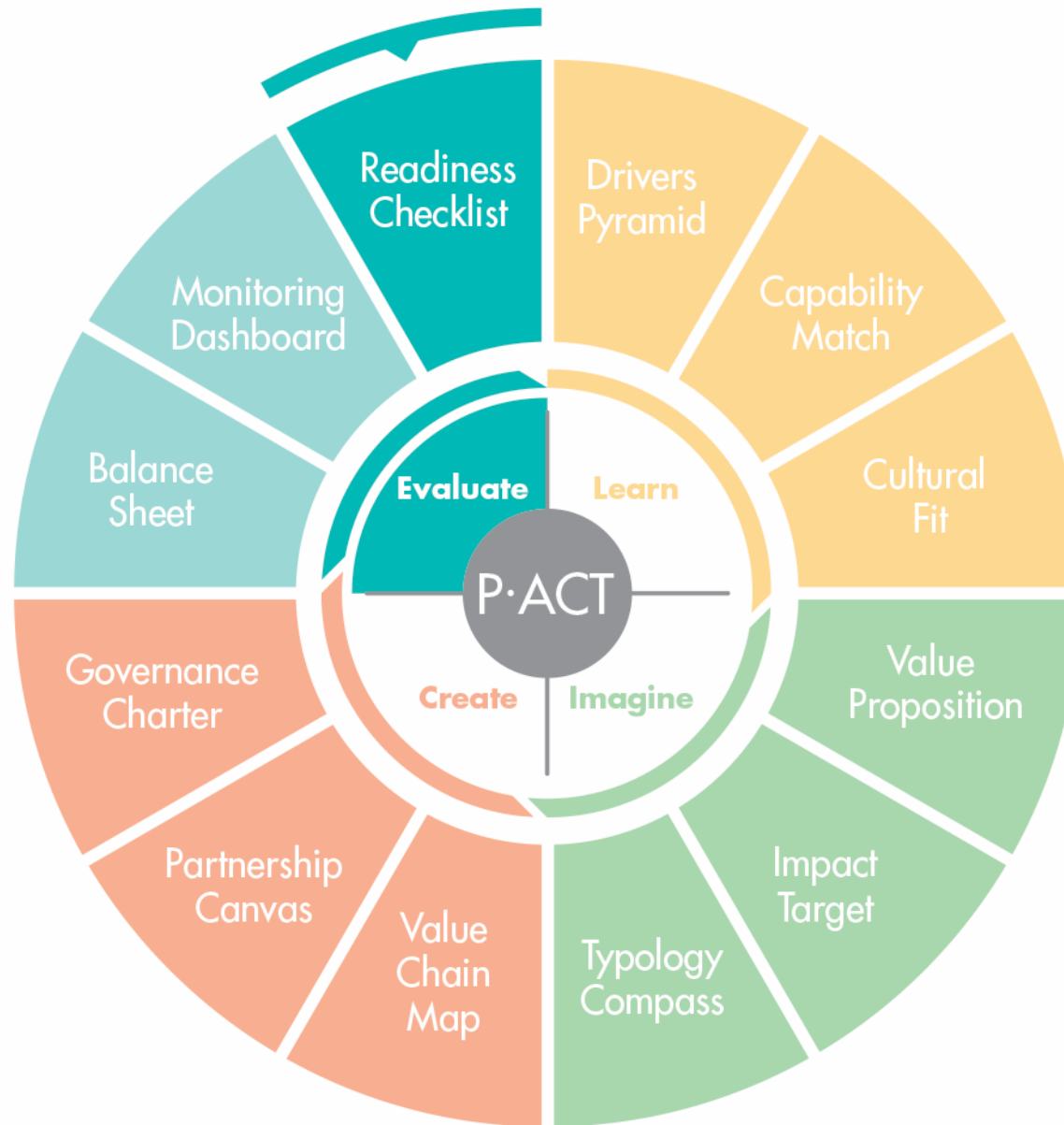
***How ready are  
we to initiate  
the partnership?***

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P·ACT



**How ready are we to initiate the partnership?**



**Pre-requisite tools:**

- Drivers Pyramid
- Value Proposition
- Value Chain Map
- Balance Sheet

**Next tools:**

- Depending on diagnostic

# Readiness Checklist

## How ready are we to start the partnership?

Impact-driven partnerships require a strong level of commitment on the part of each partner as failure can have dire consequences on stakeholders including customers, impact beneficiaries as well as on the partner organizations. Each partner needs to be equally ready to engage, and have a sufficient level of urgency to justify initiating the partnership. This tool enables partners to verify that they have achieved the key milestones for developing a sound partnership plan before initiating their partnership.

### Readiness Checklist Mural Template



## Why should we use it?

To assess the partners' readiness to initiate a partnership.



## What will we accomplish?

Assess if all partners are equally ready to initiate the partnership

Evaluate the level of urgency for the partnership to each individual partner

Identify and address gaps and barriers in each partners' readiness to initiate the partnership

## Step-By-Step

### Step 1

Self-assess readiness and urgency



### Step 2

Discuss and address gaps



### Step 3

Review the partnership model

## Step 1:

# Self-assess readiness & urgency

**1.1** Each partner needs to be equally ready to engage. Use the self-assessment spreadsheet individually to assess your **organizational readiness** for the partnership.

- **Clarity:** Are we clear on our respective motivations, expectations and capabilities?
- **Convergence:** Are we aligned on what we will achieve together, for whom and how?
- **Capacity:** Can we mobilize the people and resources necessary for the partnership?
- **Confidence:** Are we confident in the partnership we co-designed and in our collective capacity to implement it successfully?

**1.2** In addition to readiness, partners need to have enough urgency to initiate the partnership. Individually complete the self-assessment of your **organizational urgency** for the partnership.

**1.3** Reflect on your responses:




- ? Is our organization **ready** to commit to this partnership? What areas of readiness should we address before engaging? How might we do so?
- ? Is this partnership urgent enough to move ahead now? What would make this partnership more urgent? When may these conditions be in place?
- ? What other key takeaways can we conclude from completing this self-assessment?



## Step 2:

# Discuss and address gaps




**2.1** Share your self-assessment with your partner. Take a few minutes to independently review your partner's responses.

-  Did anything surprise you?
-  How does your partner's overall readiness to partner compare to your own?
-  How does your partner's urgency to partner compare to your own?

**2.2** Once you have reviewed each other's checklists, go back to each area of readiness. Identify those areas for which either partner has identified a low level of readiness or urgency. Then, together discuss the level to which each of these areas represent a barrier for moving forward with regards to the partnership.

- **Deal breaker:** The partnership can NOT move forward while this barrier exists.
- **Major Barrier:** The partnership can ONLY move forward if there is a solid plan to address this barrier.
- **Minor Barrier:** The partnership can move forward DESPITE the existence of this barrier.

**2.3** For each of the identified barriers, have an open dialogue with your partner about the following questions and record your ideas and decisions:

-  What are the key barriers we need to absolutely address before we can commit to initiating this partnership?
-  How might we eliminate or reduce these barriers?
-  How will we know that these barriers are sufficiently resolved to move forward?

Worksheet:

# Self-Assessment | Readiness - Clarity

## 1. Clarity

Click on the link to access the [spreadsheet](#):



<b>READINESS - CLARITY</b>	<b>To what extent do you agree with the following statements?</b>	<b>Partner 1</b>	<b>Partner 2</b>	<b>Assessment</b>	<b>Discussion Notes</b>
<b>Drivers</b>	<i>We can clearly identify and prioritize the drivers for our organization to engage in this partnership</i>				
	<i>We can clearly identify and prioritize the drivers for our partners to engage in this partnership</i>				
<b>Capabilities</b>	<i>We can clearly define our criteria for selecting our partners and how they respond to these criteria</i>				
	<i>We can clearly define our partner's criteria for selecting us as a partner and how we respond to these criteria</i>				
<b>Value</b>	<i>We can clearly define the value of this partnership to our partners</i>				
	<i>We can clearly define the value of this partnership to our organization</i>				
<b>Costs</b>	<i>We can clearly define the costs of this partnership to our partners</i>				
	<i>We can clearly define the costs of this partnership to our organization</i>				
<b>Culture</b>	<i>We can clearly identify our similarities and differences in terms of organizational culture and understand their potential implications on the partnership</i>				

## Worksheet:

# Self-Assessment | Readiness - Convergence

## 2. Convergence

Click on the link to access the [spreadsheet](#):



<b>READINESS – CONVERGENCE</b>	<b>To what extent do you agree with the following statements?</b>	<b>Partner 1</b>	<b>Partner 2</b>	<b>Assessment</b>	<b>Discussion Notes</b>
<b>Partnership type</b>	<i>We have aligned with our partners on the type of partnership (type I, II or III) to pursue</i>				
<b>Value proposition</b>	<i>We have aligned with our partners on the partnership customers and its value proposition</i>				
<b>Social impact</b>	<i>We have aligned with our partners on the social impact targeted by the partnership (beneficiaries, outputs, outcomes, impacts)</i>				
<b>Value chain</b>	<i>We have aligned with our partners on the value chain to deliver the partnership value proposition</i>				
<b>Value &amp; Cost share</b>	<i>We have aligned with our partners on our respective share of capturing value and assuming costs of the partnership</i>				
<b>Governance structure</b>	<i>We have aligned with our partners on a governance structure for the partnership</i>				

## Worksheet:

# Self-Assessment | Readiness - Capacity

## 3. Capacity

Click on the link to access the [spreadsheet](#):



<b>READINESS – CAPACITY</b>	<b>To what extent do you agree with the following statements?</b>	<b>Partner 1</b>	<b>Partner 2</b>	<b>Assessment</b>	<b>Discussion Notes</b>
<b>Partnership activities</b>	<i>We have clearly defined the activities our organization will execute as part of the partnership</i>				
<b>Staff capacity</b>	<i>We have secured the staff capacity (number, skills and time) to execute our part of this partnership</i>				
	<i>We have secured the staff capacity (number, skills and time) to manage this partnership</i>				
<b>Resources</b>	<i>We have secured the resources (financial, infrastructure, relational...) necessary to execute our part of this partnership</i>				
<b>Processes</b>	<i>We have established the processes in place (due diligence, legal, regulatory, relationship management...) to support and manage this partnership</i>				

Worksheet:

# Self-Assessment | Readiness - Confidence

## 4. Confidence

Click on the link to access the [spreadsheet](#):



<b>READINESS – CONFIDENCE</b>	<b>To what extent do you agree with the following statements?</b>	<b>Partner 1</b>	<b>Partner 2</b>	<b>Assessment</b>	<b>Discussion Notes</b>
<b>Leadership buy-in</b>	<i>We have secured the commitment of our leadership to engage in this partnership</i>				
<b>Performance management</b>	<i>We have strong confidence in our strategies to ensure the performance of this partnership</i>				
<b>Risk management</b>	<i>We have strong confidence in our strategies to mitigate the risks of this partnership</i>				
<b>Partner capacity to execute</b>	<i>We strong have confidence in our capacity to execute our part of the partnership</i>				
	<i>We strong have confidence in our partners' capacity to execute their part of the partnership</i>				
<b>Relationship</b>	<i>We have strong confidence in the resilience of the relationship with our partners</i>				
<b>Governance structure</b>	<i>We have strong confidence in the governance structure to resolve any potential issues along the way</i>				



## Worksheet:

# Self-Assessment | Readiness - Urgency

## 5. Urgency

Click on the link to access the [spreadsheet](#):



<b>READINESS - Urgency</b>	<b>To what extent do you agree with the following statements?</b>	<b>Partner 1</b>	<b>Partner 2</b>	<b>Assessment</b>	<b>Discussion Notes</b>
<b>Strategic Goals</b>	<i>This partnership helps us achieve one or several of our short-term strategic goals</i>				
<b>Problem to Solve</b>	<i>This partnership helps us solve an urgent problem or need</i>				
<b>Pressures</b>	<i>This partnership helps us respond to urgent stakeholder (employees, investors, civil society...) pressures</i>				
<b>Competing Priorities</b>	<i>This partnership does NOT compete or conflict with other strategic priorities for our organization</i>				
<b>Competing Partners</b>	<i>This partnership does not compete or conflict with other potential partnerships</i>				

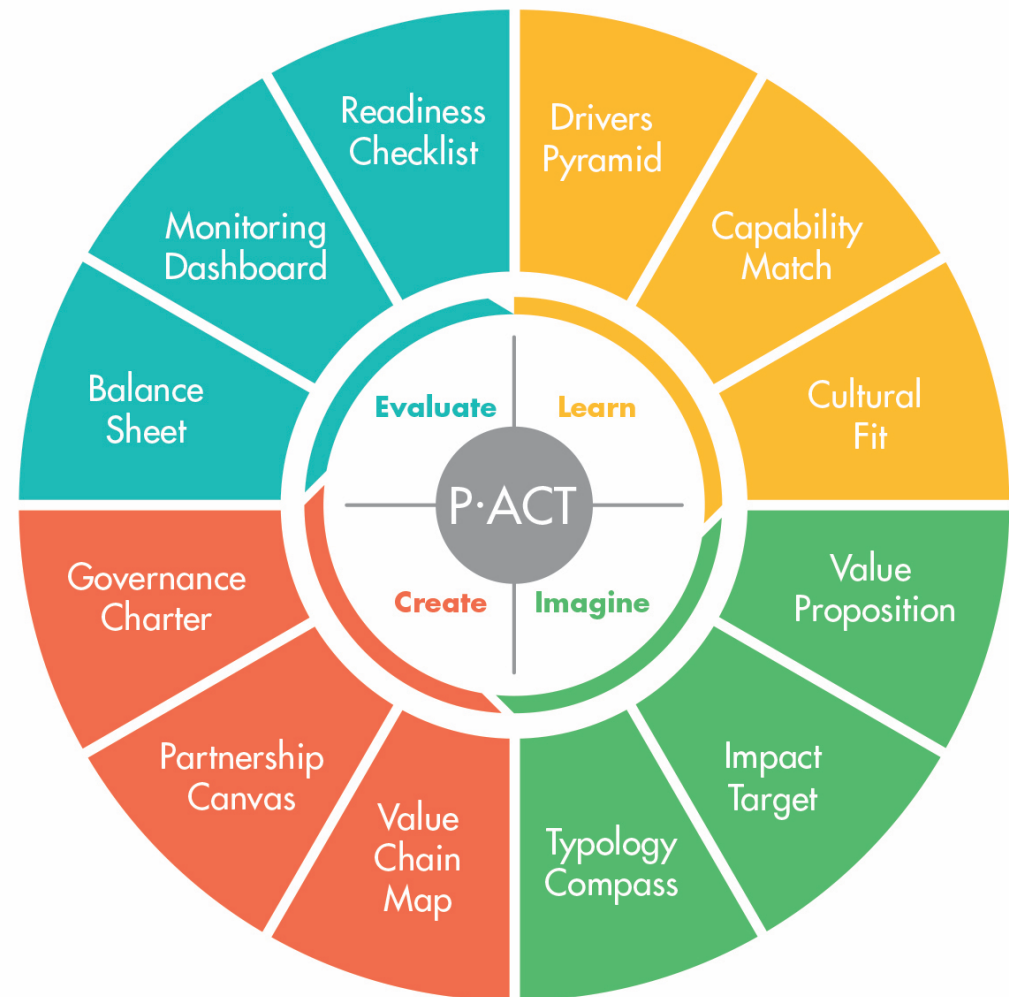
## Step 3:

# Review the partnership model

To close the loop on your co-design process and complete your Readiness evaluation, reflect one last time on the **partnership model** you have co-designed with your partners:

- ❓ Does it fulfill the partnership goals set by the partners collectively? - See output of the Drivers Pyramid tool.
- ❓ Does it create the value proposition expected by the customer? - See output of the Value Proposition tool.
- ❓ Does it generate the impact expected by or promised to the beneficiaries? - See output of the Impact Target tool.
- ❓ Does it create the value expected by each partner? - See output of the Partnership Canvas tool.
- ❓ Does the partnership generate a value to cost ratio that is acceptable to both parties? See output of the Balance Sheet tool.

If you have established with your partners that you have achieved enough readiness to initiate the partnership, Congratulations! The next step is to start developing your contractual agreement.



# Facilitation Tips

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## Step 1

### ***Individual Self-assessment***

- If possible introduce the tool to partners in advance and have them fill in and return it before the workshop. Use their answers to identify particular areas where dialogue can be focused during the workshop.
- Make sure to clearly explain the readiness criteria and the self-assessment Likert scale to all partners consistently so they have a common understanding.

## Step 2

### ***Collective reflection***

- Explain that it is normal for partners to be more or less ready in different areas. There is no competition for who is the most ready. Encourage candid conversation and suspended judgement.
- Focus dialogue on areas where either partner or both identifies a lack of readiness or urgency.
- Make sure partners are recording any solutions they come up with for improving their respective readiness. Review these together at the end of the workshop and encourage moving them to action.