



GUIDE TO PARTNERSHIP ENGAGEMENT

This guide aims to inspire organisations engaged in the partnership cycle from building partnership relations to preparing for exit.

The guide serves to inspire and support the implementation of the Partnership policy.

DPOD

DISABLED PEOPLE'S ORGANISATIONS DENMARK

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Intro

The Danish organisations of persons with disabilities have developed a Partnership Policy in 2020. The Partnership Policy outlines the rationale for working in partnerships, formulates key principles for developing and strengthening long-term partnerships, and it includes inspiration and guidance to foster good partnership practices. The policy defines a partnership as “a mutually beneficial cooperation between partners respecting each other and working towards a shared goal of positive and sustainable impact for persons with disabilities”. A partnership consequently goes beyond individual, short-term projects.

This guide is more operational in nature and includes descriptions and tools that can support sound and constructive partnership processes. The tools are intended at being inspirational for all organisations engaged or considering to be engaged in international partnerships. .

The guide is built around three sections corresponding with the three key partnership phases presented in the Partnership Policy, namely:



Note: Where the policy also mentions a ‘pre-phase’ of partner selection as well as a ‘post-phase’ of exit and strategic cooperation, this guide focuses on tools supporting the three key phases

Each section contains a more elaborate description of the partnership phase in question supplemented by some helpful tools. It should be noted that partnerships rarely follow a linear process. Tools introduced in one section may therefore be relevant at an earlier or later stage than presented here in some partnerships.

Section one – Partnership Inception – Provides inspiration on how to build a trust-based relationship with a new partner, including how partners get to know each other and establish a firm foundation of their future partnership, which is embedded in ownership in both organisations. Moreover, you will find inspiration on how to develop a good partnership and a template for the partnership agreement.

- Tool 1: Internal Consultation and Partnership Workshop: with the purpose of obtaining a broad and genuine commitment to the partnership and to develop and discuss the partnership agreement (annex 2).

Section two – Partnership Building – Provides inspiration for regular monitoring and joint review of the partnership where partners confirm whether the partnership is solid, on track and meeting the agreements made, or if expectations need to be redefined and/or commitment reaffirmed.

- Tool 2: Partnership “health check” supporting partners in reviewing the added value and effectiveness of the partnership.
- Tool 3: Spider Diagram for examining the partnership and developing a visual representation of the ‘current shape of the partnership’.
- Tool 4: Dispute Resolution and Conflict Management introducing means to analyse a situation and determine how to address a dispute or conflict.

Section three – Partnership Maturity – Gives inspiration related to how to approach and prepare for a partnership exit. The tools aims to serve as a guide on how to exit a partnership in a transparent manner and without jeopardizing joint outcomes or the partners’ future existence and operation. These tools supplement the tools of section two, which are also relevant to apply in this phase of a partnership.

- Tool 5: Matrix for planning a sustainable and responsible exit.
- Tool 6: Proposed content of an Exit Strategy.

Section 1: Partnership inception – shaping and formalizing the path for partnership

Any good partnership starts by building a respectful and trust-based relationship based on a dialogue about shared vision, goals, expectations etc. The process of building a relationship is important in order to avoid misunderstandings arising from the fact that the partners know relatively little about each other including their different values, motivations and possible types of contribution. Generally, it is recommended organisations not to formalise a partnership until both parties feel assured of the partnership potential, and have reached an agreement about the key partnering principles and negotiated the scope and terms of a partnership agreement or MoU.

Partner organisations are therefore advised to take their time to get to know each other, build a relationship and perhaps test the mode of cooperation with small-scale activities for a period prior to the conclusion of an actual partnership agreement.

The partnership inception process can thus involve a pre-partnership agreement, where the partners get to know each other before the partners sign an actual partnership agreement.

Partnership agreement process – getting to know each other

The priority of a new partnership should be on building a respectful and trust-based dialogue about shared values, goals, expectations etc. Part of this is to create a framework for cooperation. Prior to the process of drafting an actual partnership agreement the organisations are advised to consider a number of issues- individually and jointly. Before hurling the organisations into signing a partnership agreement, some “homework” needs to be done. This includes consulting different levels of the organisation to gather different inputs and obtaining a broad buy-in to the partnership.

A **partnership agreement** sets out the principles and priorities of the partnership and constitutes the overall framework for collaboration between partner organisations. It is important that there is full agreement and commitment from both parties. The partnership agreement is not legally binding, but provides the overall frame and direction

for other, more specific and binding agreements, e.g. project agreements¹, terms of appointment, etc.

When signing a Partnership Agreement, the agreement will typically have a certain timeframe. The timeframe does not necessarily correspond with the partnership duration, but rather that the partners will take the partnership up for revision and re-negotiation.

Partners are advised to plan for mutual visits, not only at their respective headquarters, but also “in the field”. Here, the partners will be introduced to the members and areas of work in the respective organisations and be provided an opportunity to discuss challenges and successes and get a feel for the local context and possible areas of collaboration. In some cases, it is relevant to pilot joint small-scale interventions to test the collaboration. Such initial partnership activities can be based on a Memorandum of Understanding, which is often less formal and with a more open scope than a partnership agreement.

When organisations feel ready to formalize their relationship, they will benefit from a process devoted to the development of an actual partnership agreement. Such an agreement can be developed jointly at a partnership workshop where both organisations are represented by participants with a mandate to make decisions organisation and where both/all parties have an equal say in terms of form and content.

Tool 1: Internal consultation and Partnership Workshop

The purpose of this tool is to facilitate a process towards signing a Partnership Agreement, where the partner organisations are supported in making informed and broadly owned choices about a new partnership.

Step 1: Internal Consultations

¹ Please note that a partnership agreement will not contain any project specific details such as planned joint development interventions, funding details etc. These are addressed in more specific project documents and funding agreements.

The internal consultation is a means by which the future partners have an internal open and honest discussion about a potential partnership with a view to clarify internal expectations and achieve a broad and genuine organisational commitment to engage in a new partnership with the other organisation.

The internal consultation is estimated to take approximately half a day and should involve the relevant stakeholders within your organisation, including board members, management, staff that will be engaged in the partnership. In many organisations a decision to formalise a partnership will also require endorsement/approval by the board/governance.

The consultation is recommended to be facilitated by the person(s) who have been most involved with the new partner. It is important that the facilitator allows for a thorough and honest discussion, which identifies all relevant concerns and addresses these before making the final decision to engage in a formal partnership.

The following are questions that can guide your internal discussion:

- Do we have enough information / knowledge about our future partner, including the organisation's mandate, membership, legitimacy, history, strategies, primary intervention areas, funding sources etc.?
- What are our three main reasons for entering into the partnership with [X organisation]?
- What is our vision/goals for the partnership with [X organisation]? And,
 - what are the benefits of a partnership?
 - what do we specifically want to achieve by entering the partnership?
- How does the partnership fit our mandate, mission and organisational strategy (or any other strategy)?
- Is there ownership of the partnership throughout the organisation? If so, how is that expressed?
- What is our added value to the partnership? And,
 - What can/will we specifically contribute to the partnership?
 - What do we see as our key roles and areas of responsibilities?

- What are to us the most essential rules governing the partnership? And,
 - What does mutual accountability and transparency mean to us, and what mechanisms do we want to install within the partnership?
- What are our expectations as for the scale of cooperation and the timescale of the partnership?

Note: it is important that both organisations do their homework individually. This requires that the Danish organisation of persons with disabilities suggests a potential partner to conduct its own consultation.

It is advised that the answers to the above questions are documented in an internal document and activated in the next step where the partnership is formalized in a partnership agreement.

Step 2: Partnership workshop

A partnership workshop is a valuable means for partners to develop, discuss and sign a partnership agreement.

The tentative timeframe for a partnership workshop is two days. Within these two days, you should aspire to involve the leadership and key staff and volunteers in both organisations.

The workshop should ideally be facilitated jointly by two persons – one from each of the partnering organisations or an external. The facilitation must focus on creating a trusting and open space for a dialogue on the aspirations and expectations of the partnership.

Workshop Day 1: Creating a trusting and open space for dialogue

When working in partnership it is important to consider how the relationship fits /interacts with the ongoing work of each partner organisation and the capacity that is required of each party to make the relationship work.

A trusting and open space for dialogue on how the partnership fits the involved organisations can initially be created by asking participants to prepare and present a brief overview of their organisation. This could include the following four areas:

Identity: Who we are

- Year of establishment and purpose (vision/mission) of the organisation
- Organisational structure incl. number of branches and members
- Governance structure

Implementation: What we do and how we work

- Main target groups
- Main strategies and primary intervention areas (activities)

Relationship: Who we work with

- Main donors and other partners
- Main strategic partners in disability politics and in development

Strengths and weakness*

- Key strengths that you have to offer to the partnership and potential weaknesses/risks (e.g. capacity gaps, impacts on other relationships, core costs) within your organisation.

***Note.** The partnering organisations will benefit from realistically identifying their respective organisational strengths and challenges, to initiate the discussion on how they can develop, complement and learn from each other. A simple assessment can be made during the workshop using the SWOT analysis (please refer to Annex 1). More elaborate assessments can be conducted at a later stage.

Following the presentation, the partners are asked to share their main reasons for entering the partnership, their vision/goals for the partnership and the expected benefits/achievements of the partnership. After sharing the partners should identify the common ground for the partnership by formulating a shared vision and common goals for the partnership, for example based on the following questions:

- What future do we imagine together; what is our shared vision for the partnership and what are our common goals? Why do we need each other?
- What specific areas of work can - and should - we collaborate on given our shared vision/goals*?
- What results do we expect to be able to achieve together?

***Note** that the shared vision/goals for the partnership and the areas of collaboration will constitute the foundation for the preparation of an actual partnership agreement. Partners are advised to formulate the key areas collaboration as concretely as possible, and when possible set measurable indicators of achievements.

Workshop Day 2: Formulating a Partnership Agreement

Day two of the partnership workshop is devoted to drafting the actual partnership agreement. The following list of items can help guide the development and discussion of the agreement by specifying shared decision regarding the collaboration, communication, roles and responsibilities. The list is supported by an example of a template for a partnership agreement (Annex 2).

Please note that all partnerships are unique, and there is no one-fits-all template for a partnership agreement. All items on the list should therefore be carefully considered for relevance and accuracy and adjusted according to the partners' needs and wishes.

Summary of items in a partnership agreement

A: Name and contact details of the partners, specifying focal persons for the partnership.

B: The vision/goals and key areas of cooperation/achievements

The vision/goals of the partnership and the areas of cooperation should be based on the initial discussion/agreement of these matters (developed day 1). Make sure to describe the key areas of collaboration as concretely as possible and indicate measurable indicators of achievements.

C: The Principles Governing the partnership

Question to be clarified: - What should be the principles governing the cooperation, i.e. the principles that will safeguard that the partnership is based on a respectful and trust-based relationship, shared purpose, joint action, mutual learning and accountability and transparency?

Q - Are there any non-negotiable expectations/conditions for how the partnership should be governed?

The principles governing the partnership define the spirit in which the partners envisage the partnership to be implemented and constitute a framework for monitoring the partnership. The principles are thus of key importance to the partnership, and sufficient time (approximately 3 – 4 hours) should be allocated to identifying and agreeing on these. Please refer to the tool developed specifically for the purpose of establishing the Principles Governing the Partnership cooperation (Annex 3).

The principles may be attached as an annex to the Partnership Agreement.

D: The respective roles, responsibilities and contributions of each partner

Q - Who is responsible for what/contributes with what? (for example: networks, access to local decision makers, technical skills, funding, local knowledge, training, time, etc.)

Consider whether there are areas of work that should be specialized in a way so that only one organisation is responsible for it – allowing particular competencies to develop.

E: Communication

Q - What should be the shared language of communication, and are there any minimum standards/level of communication (means of communication/timeframe)?

Q - How can we make all key documents available for board members, management, members and volunteers?

F: Monitoring of the partnership relation

Q - How can we keep track of the way the partnership develops?

Q - What should be the timing of our check-ups (monitoring) and how should success stories related to the partnership be collected, documented and shared with others?

Q - Should the partnership be evaluated at some point?

G: Validity of the agreement

Q - How/when is the agreement enforced and what is the timespan (including plans for exit) of the agreement?

Q - What happens in case a partner breaches parts of the agreement?

Q - How can amendments be made to the agreement.

Q - What are the complaints and possible mitigation procedure in case of conflict?

Q - What is the process to terminate the partnership before the partnership agreement expires?

H: Anti-Corruption and Preventing Sexual Harassment, Exploitation and Abuse clauses
In case the partnership is expected to involve the transfer of funds, it is strongly advised to include a corruption clause and to discuss the understanding of corruption and its implications.

Q - What do we regard to be corruption?

Q - What are the measures to avoid corruption within the partnership, and what is the procedure in case of corruption or suspicion of corruption?

Moreover, all partners are strongly advised to include a clause on Preventing Sexual Harassment, Exploitation, and Abuse (PSHEA) and to discuss the understanding of PSHEA and its implications.

Q - How do we define PSHEA?

Q - What are the measures to avoid PSHEA within the partnership? And how do we deal with it in case it happens?

Partners may find it helpful to develop Codes of Conduct for their own organisations, which address Anti-Corruption and PSHEA and support the content of the Corruption and PSHEA clause of the partnership agreement. For inspiration, please refer to the Sample Codes of Conduct in Annex 4.

I: Signatories: Stipulating when it is signed, by who and on behalf of which organisations.

Consider whether any items or remarks should be added to the agreement, for example regarding development workers' position and role in the partnership.

Note: The signing of the agreement may require the approval of the respective boards. Signed copies of the partnership agreement should be kept in both organisations.

Section 2: Partnership building – monitoring the partnership

The process of building the partnership involves regular monitoring and review of the partnership with a view to building and maintaining the collaborative relationship between the partnering organisations. This is done by jointly examining the outputs and outcomes of joint actions, but more importantly by conducting a regular “health check” to confirm whether the partnership is solid, on track and fulfilling the agreements made, or whether expectations need to be redefined and commitment reaffirmed.

Regular monitoring also makes way for:

- Improving the coordination within the partnership and encouraging motivation,
- Preventing and/or correcting conflicts and disputes before they harm the partnership,
- Recognizing successes and failures and learn from these to improve the relationship and joint actions.

Regular monitoring of the partnership

Partner organisations are advised to reflect on the partnership and carry out joint monitoring of the key items in the partnership agreement on a regular basis, for example annually or biannually. This provides an opportunity to reflect on how the partnership is progressing and whether it is optimizing the partners’ potential and benefiting their respective members and the wider environment.

It may be a challenge to find time for monitoring, but those who adopt a reflective practice will see a return on investment.

Partnership monitoring and review (in addition to evaluations of joint actions) can be done in various ways. It can for example be arranged as partner consultation or a reflection workshop, where the partners meet and assess the collaborative relationship, the added value and effectiveness of the partnership, etc. Such consultation/workshop is also an opportunity for sharing updated information about the context and the developments within the partnering organisations and revisiting the partnership agreement.

Note that the partnership should be broadly “owned” by all partnering organisations. A principle of inclusivity (within reason) should therefore be followed when selecting participants for a partnership consultation/reflection workshop. On the Danish side, it is important to demonstrate that the organisation considers the partnership process to be important. Hence, the organisation’s leadership (board and/or management) should be represented in the consultation/workshop together with staff and/or volunteers responsible for the partnership. Similarly, the Danish organisation may expect the partner to participate with corresponding leadership, staff and leadership.

Tool 2: Partnership “health check”

A “health check” is synonymous with a thorough dialogue on the status of the partnership to identify areas of strength and concern.

The purpose of this tool is to support partners in making a qualitative and dialogue-based review of the partnership, including revisiting the partnership agreement, documenting lessons learned, key areas of achievement and what to hold on to / let go of within the partnership.

What follows is a non-exhaustive list of topics that can be used for conducting the “health check”. The content and sequence of the actual agenda will depend on what the organizers deem necessary, convenient, and effective.

Prior to the workshop, partners are advised to prepare well for the dialogue, for example by filling the Partnership Assessment (Annex 5).

The following are general followed by specific topics for discussion:

General topics:

- Context updates; are there any significant changes in the Danish/Global South context (such as new legislation, new or increased risks, etc.) affecting the partner organisations and/or the partnership cooperation?
- Strategic updates, where are the individual organisations heading; are there for example changes in strategic directions, thematic intervention areas, external relations (new partners/donors)?

Partnerships commitments and agreements:

- To what extent [e.g. very high/high/moderate/low/very low] are the partners still committed to the partnership? What are the main reasons for the level of commitment?
- To what extent [e.g. very high/high/moderate/low/very low] are shared vision/goals being met? What are the main contributing factors to the level of achievement?
- Based on the current situation, need to add new areas of cooperation to the partnership?
- How has the partnership influenced (positively and negatively) the way the partnering organisations (and the individuals involved in the partnership) manage their individual tasks and achieve their individual goals?
- Is there sufficient recognition of the respective partners' contribution to the partnership, i.e. do the individual partner feel recognized for their different inputs?
- Does the partnership agreement - or parts of it - need to be adjusted?

Managing the partnership:

- To what extent [e.g. very high/high/moderate/low/very low] is the partnership governed by the rules stated in the partnership agreement? If the partnership is found not to be governed by the rules to a high or very high extent, why is that and what needs to be changed?
- Are individuals at the right level representing the partnering organisations? Do they have sufficient authority to make commitments on behalf of their organisation?
- Do the individuals (staff and volunteers) involved in the partnership have sufficient time allocated to support the partnership and adequate backing from their organisation to meet their commitments?
- What happens if organisations/individuals do not meet their commitments?
- What are the mutual expectations regarding the duration of the partnership, considering long-term strategies and exit strategies?

Summarizing lessons and achievements, and looking forward:

- Looking back, what are the key lessons learned from the partnership and how are lessons learned documented?

- Looking back, what are key achievements of the partnership and how are achievements documented?
- Looking forward, based on lessons learned and achievements is there anything specific that the partners want to hold on to / let go of moving forward in the partnership?

The dialogue about the topics included in the above-mentioned tool 2 is advised to be supplemented by a participatory partnership monitoring exercise, for example using the Spider Diagram in tool 3 (Annex 6) or the SWOT matrix (Annex 7).

Tool 3: Spider Diagram

The “spider diagram” (also radar chart) is a means for examining the partnership relation and develop a visual representation of the ‘current shape of the partnership’ that allows for easy comparisons.

The purpose of this tool is to monitor progress in the development of the partnership relation. The tool can be used in different ways. For example, to a) compare difference in perception between the partnering organisations, b) examine how a partnership evolves over time, or c) compare differences between the existing nature of the partnership and the desired partnership.

Following is a description of how to use the “spider diagram” and its eight axes to assess the degree to which the partnership meets the eight criteria. The process comprises two stages:

Stage 1: Select the criteria for assessing the partnership.

Stage 2: Examine the partnership using the agreed criteria.

Selecting the criteria

1. Consider possible criteria for assessing the partnership (inspiration may be found in the Partnership Agreement). Write the criteria each on a separate card.
2. Briefly discuss the different criteria and decide on a common understanding of the criteria.

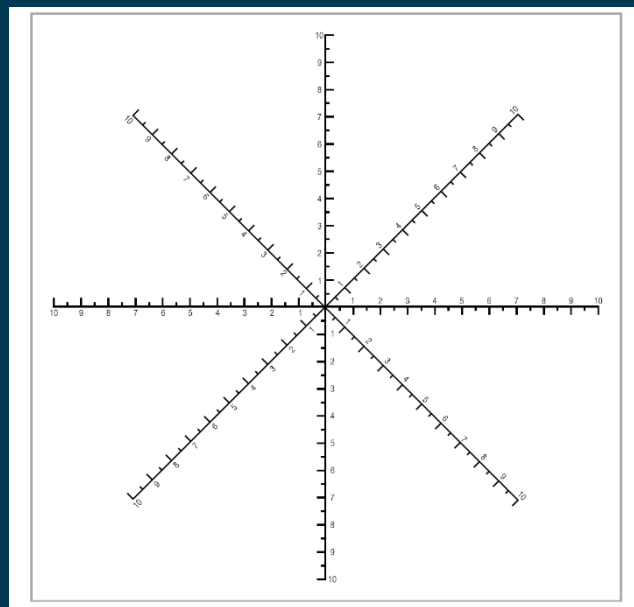
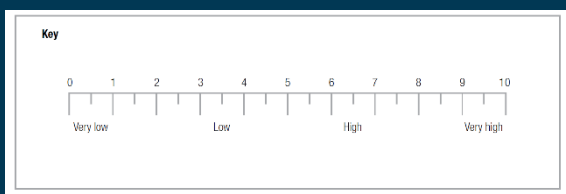
3. Agree on 8 criteria for assessment.

Agreement on the criteria can be reached by giving each person involved in the exercise eight 'votes' (small self-adhesive coloured stickers work well) and ask them to place their "votes" on the eight cards that they believe contain the most relevant criteria for assessing the partnership. Count the total 'votes' for each card. The eight cards receiving the most votes represent a consensus on the most important criteria.

Examining the partnership

4. Place the eight agreed cards on the end of the 'legs' of a large-scale version of the spider diagram.

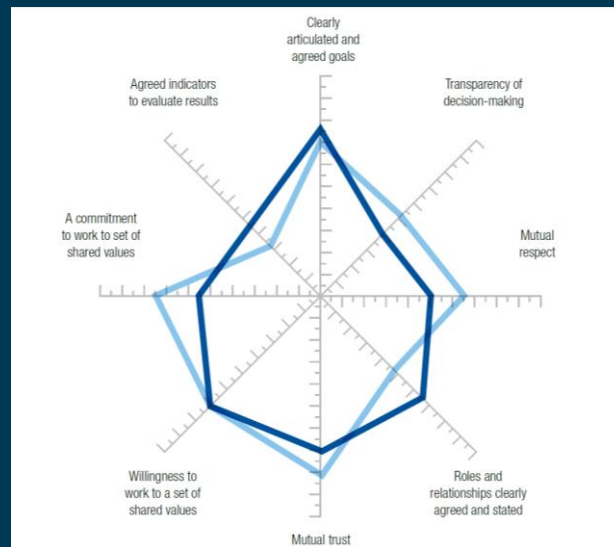
5. Decide (individually or in groups) to what extent the partnership currently meets each of the eight selected criteria. Each participant/group of participants should initially complete a handout of the spider diagram using the following 'key' for guidance (see annex 6 for a template of the handout).



6. Each person/group should subsequently plot their assessment on the large-scale diagram by marking their scores on each axis and joining the dots. If possible, each person/group should use a different coloured pen.

7. The diagram can then be used for a discussion about the partnership: making comparisons; exploring the differences in scores and what these differences represent; identifying issues or problem areas that need to be addressed and generating ideas for strengthening the partnership.

Following is an example² of a spider diagram where two different perceptions of the same partnership are represented by differently coloured lines.



Resolving disputes and managing conflicts

A partnership involves organisations and individuals from different backgrounds and orientations, carrying different experiences, attitudes, needs, expectations, resources, and personalities. Such differences are potential sources of disputes and conflict. Thus, disputes and conflicts can potentially arise in a number of different areas, for example:

THE GOAL OF THE PARTNERSHIP: partners may interpret the goals of the partnership differently.

PRIORITIES WITHIN THE PARTNERSHIP: one partner may prioritize time and energy for developing the partnership relationship, whilst the other partner may prefer joint actions over the relationship.

UNCLEAR ROLES AND RESPONSIBILITIES: the Danish partner may see itself as the provider of capacity building or as a co-implementing partner in joint development interventions, whereas the partner in the Global South may regard the Danish partner more as a “donor”.

² The example is copied from WWFs “The Partnership Toolbox”.

UNEQUAL POWER RELATIONS: unequal access to financial resources may foster inequality in decision-making and control, and lead to unhealthy domination by one partner.

MONEY AS 'TABOO': the aspiration for an equal partnership relation and the principle of sharing resources can make the dialogue about funding a 'taboo' and generate unrealistic expectations to the access to resources.

LACK OF RECOGNITION: partners may not be acknowledging and utilizing the knowledge and skills of the counterpart.

INSUFFICIENT UNDERSTANDING OF THE CONTEXT: The Danish partner may not sufficiently understand the (organisational and external) context in which the partner operates and is therefore unable to provide support for the things that are most relevant to the partner.

INABILITY TO DELIVER The Danish partner may not be able to deliver on its promises of funds, technical support including staff or other resources, which may lead to credibility issues, while the partner in the Global South, on the other hand, may not be able to deliver on results and the documentation of results.

A problem-solving, constructive approach to disputes and conflicts are based on the following principles:

- Intervene quickly in cases of dispute or conflict and deal with issues head on in a sensitive, fair and constructive manner.
- Always confront the person(s) involved in the conflict before discussing it with others.
- Engage in dialogue and listen carefully to different concerns in order to identify the root of the conflict.
- Remain objective and avoid making hasty judgements.
- Be constructive in finding solutions for moving forward and be prepared to make compromises.

Tool 4: Dispute Resolution and Conflict Management

Disputes and conflicts arise in any type of relationship, including NGO partnerships. It is consequently of great importance to address and deal with these in an appropriate manner.

The purpose of this tool is to introduce means to analyse a situation and determine how to address a dispute or conflict.

Conflict analysis

To deal constructively with a dispute or conflict when it occurs, an analysis is needed to understand the dynamics within the partnership and identify the issues/relations that are causing and driving the conflict.

Note that disputes are always explicit whereas a conflict can be open and obvious, or more subtle and hidden.

To understand a dispute or conflict, it's necessary to ask questions, such as:

- What is the dispute or conflict about?
- Who are involved?
- What is driving the dispute or conflict situation now, both for better and for worse?
- Are there any obstacles hindering progress towards a peaceful resolution that need to be overcome?

The spectrum and principles of Dispute Resolution and Conflict Management

Having analysed the situation, it may be helpful to use the matrix below to determine the most appropriate response, process and involvement of actors.

Level of dispute or conflict	Response	Process	Actors
Insignificant	Ignore it	Not acting /watchful waiting	None
Minor	Talk about it	Negotiation	Parties (partners)
Significant but within the control of the partnering organisations	Mediate it	Mediation	Mediator (internally or externally appointed)
Major without the control of the partnering organisations.	Take it to a higher authority	Arbitration	Arbitrator (external)

Mechanisms for detecting and addressing disputes and conflicts

There are different ways of detecting disputes and conflicts. Following are examples of mechanisms that may help you identify and handle disputes and conflicts at an early stage:

Quality indicators: by developing quality indicators for the partnership, you will be able to continuously assess the extent to which the partnership meets its success criteria.

Feedback mechanisms: by establishing a feedback mechanism for example in the form of a specific complaint procedure or a questionnaire, Partners will have the opportunity for regular feedback on the quality of the partnership and their satisfaction with the relationship, enabling the respective partners to monitor the quality of their performance and identify unresolved issues.

Partner consultations: by conducting regular partner consultations the partners will be able to reflect on the partnership relation, areas of disagreement, disputes and conflicts and find ways to deal with these.

Organisational capacity development

Organisational capacity development features as a joint action in most partnerships. This guide is not a manual on how to facilitate capacity development. For a guide on organisational capacity development please refer to DPOD and CISU's "Guide to Organisational Development in Civil Society Organisations".

When engaging in the organisational development of a partner organisation it is of great importance to consider the following good practices:

- **Develop based on needs** – make sure that the capacity development is based on the existing needs of the partner organisation.
- **Ownership is key** - make sure that the capacity development is owned and powered by the partner organisation itself.
- **Grow slowly** – make sure the capacity that is developed has time to become institutionalized.
- **Small is beautiful** – be careful not to create artificially large organisations, only build capacity (in terms of staff and structures) that can be sustained beyond the funding from the Danish partner organisation.

Early considerations on exit

Any partnership will terminate at some point, and this should ideally occur at a point in time where both partners are in a strong, independent and sustainable position to be able to maintain their mandate and carry on its work independently.

Considerations on the right timing of an exit ought always to be supplemented with an assessment of the partner's organisational capacity and sustainability.

Section 3: Partnership maturity – continued monitoring and preparing for exit.

During the partnership maturity phase, the tools in the previous phase on monitoring are relevant to continue using on a regular basis throughout the partnership. However, partnerships are a means to an end and thus designed to conclude at a certain stage. In the process of maturity, the partners are gradually envisaged to become more robust, effective and sustainable organisations with a low level of dependency and expectantly a strong commitment to deliver lasting changes for persons with disabilities. Achieving maturity is largely dependent on the ability of partners to transform learning (skills, knowledge, promising practices) into institutionalised organisational and professional practices.

The key task during the final phases of partnering includes consolidating organisational capacity; documenting and celebrating joint learning and results; ensuring that outcomes can be sustained/scaled/transferred; and exploring new options and establishing new strategic alliances.

Exit focuses the mind on what really matters: on what will be left behind as a legacy after you are gone. Exit forces a focus on genuinely sustainable development. Sustainable development enables exit – not the other way round.

Rick James, Intrac

In the preparation for exit, three key principles should be kept in mind and applied: **No surprises; transparency and leadership.**

To avoid surprises and ensure the highest level of transparency in the process of phasing out a partnership an exit strategy must be developed and implemented gradually. It is important that the exit strategy is developed and implemented in an inclusive manner, where both (all) partners take leadership and ownership of the process. This is to ensure that neither the joint outcomes nor the partners' future existence and operation are being jeopardized.

Planning for a sustainable and responsible exit

In the process of planning an exit strategy it can be helpful to consider the following three types of phasing out strategies:

PHASING DOWN is a gradual decrease in joint actions, utilizing local resources to sustain partnership benefits while the Danish partner deploys fewer resources. Phasing down is often a preliminary stage to phasing out or phasing over.

PHASING OUT refers to the Danish partner's withdrawal of direct involvement. Ideally a partnership is phased out after permanent or self-sustaining changes are achieved in the partner organisation and among its members/beneficiaries, thus eliminating the need for additional external inputs. In the process of phasing out all direct involvement it is important to consider:

- If the partner has sufficient internal funding (membership fees, IGAs, other) to be able to continue its operations (funding of activities, staff, offices, etc.).

- If the partner needs external funding.

Should the partner need continued external funding, a plan must be made for how best to obtain such funding before the termination of the partnership.

In order to assist the partner to get on the following can be of help: A Partnership Completion Report; Letter of Recommendation; regular post partnership follow-up calls, etc.

PHASING OVER concerns the Danish partner's transfer of partnership activities to another stakeholder for example an international or local NGO or local authorities. Please note that it can be difficult to identify which activities to continue (hand over) and which to stop. In the process of phasing over it is advised that sustainable activities are continued within the partner organisation, whereas "not yet" sustainable yet critical activities should be handed over to other NGO partners or local authorities.

The planning of an exit strategy is a process. A useful first step in the development of the exit strategy is to conduct a partner dialogue, where the partners jointly define which key components and overall benchmarks are relevant for a sustainable and responsible exit.

Tool 5: Matrix for planning a sustainable and responsible exit

To prepare for the development of an exit strategy the partners must jointly decide on the key components and benchmarks relevant for the exit. The key questions are:

1. What components (areas/elements) must we to develop a sustainable and responsible exit strategy for the partnership?
2. What are the overall benchmarks for a sustainable and responsible exit?

The following is a non-exhaustive list of possible components and guiding questions:

Component	Question
Timeframe	What is the timeframe for phasing out the partnership?
Operation of the organisation	What capacities exist/need to be developed to maintain the operation of the partner organisation?

	How do we plan for the gradual phase out of expenses for operation, including governance structures, personnel and administration?
Joint actions	What activities can be sustained without external inputs? What activities must be terminated/handed over to other stakeholders? How do we plan for the gradual phase out of budget for activities?
Services to persons with disabilities	What services can be sustained without external inputs? How do we plan for the gradual phase out of support to service delivery (e.g. scholarships, labour market integration and accessibility trainings)? What services will need continued external financing?
Local resource mobilization	Does the partner have a solid fundraising plan, which will help it to mobilize adequate resources to maintain its activities, operation and administration?
Post exit	What kind of relationship do the partners aspire to maintain after the termination of the partnership (e.g. strategic alliance, joint advocacy)? What type of in-kind support would be useful (e.g. advice, technical assistance)?

When having agreed on the components to include in the exit strategy, the partner organisations are advised to jointly develop overall benchmarks that can help guide and monitor the efforts leading to a sustainable and responsible exit. In doing so you can use the matrix below (for an example of a filled matrix please refer to Annex 8):

Timeframe	[YEAR]	[YEAR]
Components	Overall benchmarks for a sustainable exit	
Operation of the organisation - organisational and financial sustainability	•	•
Joint actions	•	•
Services to persons with disabilities	•	•
Local resource mobilization	•	•
Post exit	•	•

The Exit Strategy

After the mutual dialogue on components and overall benchmarks the second step is to formulate an actual Exit Strategy describing the conditions that apply in the areas covered by the strategy, detailing the exit activities and the specific benchmarks, and who will be responsible within what budget.

Tool 6: Proposed content of an Exit Strategy

Organisational sustainability

- Brief description of the status including key challenges/opportunities for organisational sustainability in the partner organisation:
- Description of the exit activities (and timeframe):
- List of specific benchmarks for measuring the implementation and results of the activities:
- Person/s responsible:
- Budget:

Economic sustainability

- Brief description of the status including key challenges/opportunities for organisational sustainability in the partner organisation:
- Description of the exit activities (and timeframe):
- List of specific benchmarks for measuring the implementation and results of the activities:
- Persons responsible:
- Budget:

Joint actions

- Brief description of the status including key challenges/opportunities for organisational sustainability in the partner organisation:
- Description of the exit activities (and timeframe):
- List of specific benchmarks for measuring the implementation and results of the activities:
- Persons responsible:

- Budget:

Support to services

- Brief description of the status including key challenges/opportunities for organisational sustainability in the partner organisation:
- Description of the exit activities (and timeframe):
- List of specific benchmarks for measuring the implementation and results of the activities:
- Persons responsible:
- Budget:

Post exit

- Brief description of the aspiration for a continued relationship beyond the partnership:
- Description of the activities to prepare for a continued relationship:
- Persons responsible:
- Budget:

Once the Exit Strategy is in place and the partners have begun implementing it, you will need continuously to monitor where you are and measure progress towards the benchmarks.

The Human Resource side of an Exit

In some situations, an exit will imply that the partner must lay off some employees who, for example, have been financed under projects that will be terminated together with the partnership. Such a situation can be handled in different ways, but key is to be aware, have an open dialogue about the situation and to plan well ahead in order to maintain the largest degree of continuity, institutional memory, contextual knowledge, and maintain relationships of trust through the transition process.

It is particularly important with clear communication in terms of which jobs remain after the exit, and which positions will not be extended, and to give those in the latter positions a fair notice period and provide them with incentives (e.g. additional pay) to stay until the position is terminated.

In regards to managing human resources in an exit process, leadership is particularly important. Thus, it is important knowing the relevant legislation on redundancy and redeployment, and to conduct robust consultation processes with staff, and potentially provide career development support: offering training opportunities, the opportunity to move into new/more senior roles, access to mentoring, CV writing and interview skills, etc. It can also be considered to conduct regular staff satisfaction surveys and provide feedback to maintain staff trust and minimize uncertainty.

On a final note...

When the partnership finally ends, it is important that it ends well. This means that the closure process is managed with as much attention as the prior phase and that the outcomes of the partnership are documented and maintained.

When a formal partnership ends a **strategic cooperation** may begin. In such a strategic cooperation, the partners may experience the paradox that true partnership is achieved at the moment of mutual independence and equality.

ANNEXES

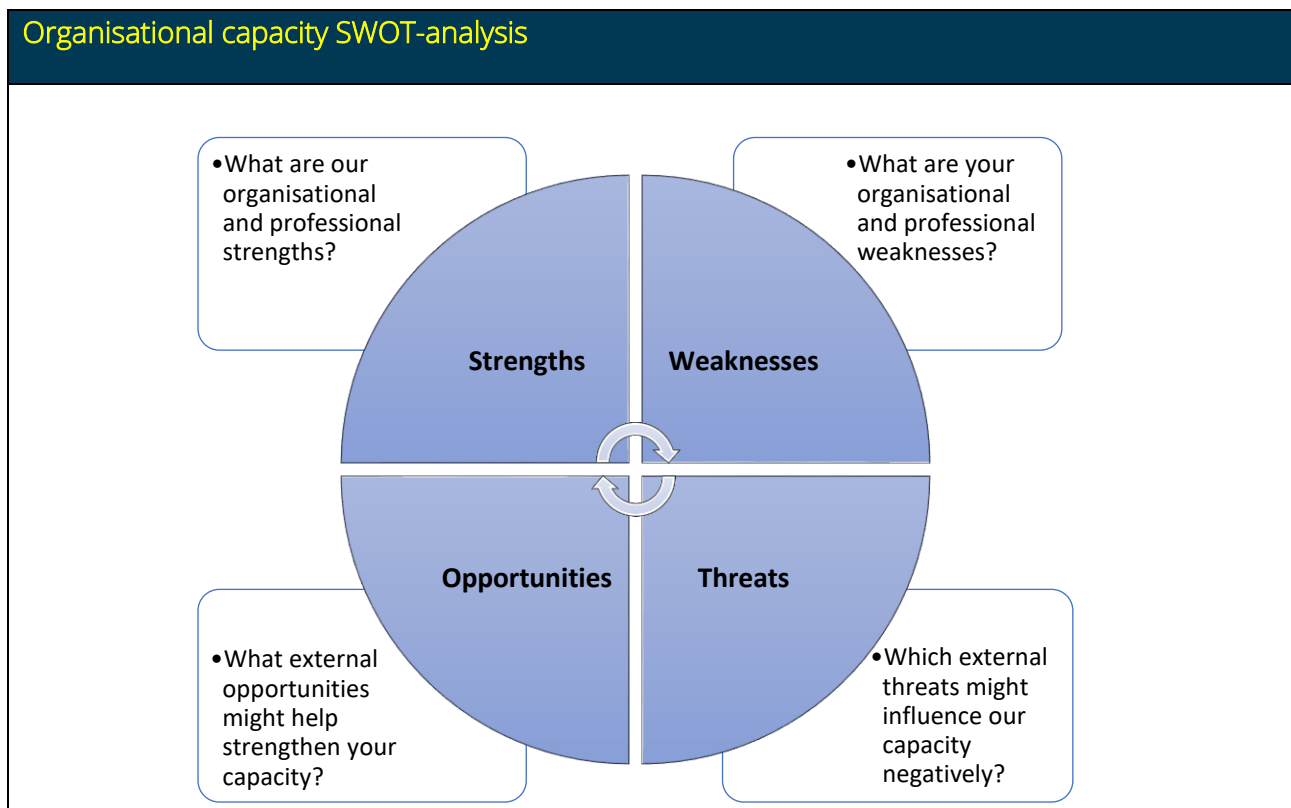
Annex 1: Organisational capacity - SWOT-analysis

SWOT is an abbreviation of the four words: Strengths, Weaknesses, Opportunities and Threats.

The following version of the SWOT-analysis is a simple and effective tool that can help you to examine organisational capacity. The tool focuses on internal as well as external conditions; Strengths and Weaknesses relate to internal factors, while Opportunities and Threats represent external conditions.

Begin the analysis by brainstorming on the question in the upper left corner of the figure: *What are organisational and professional strengths?* Write down all the strengths on separate pieces of paper and place them so they can be read by everyone. Continue clockwise to the next question.

When you have completed the questions, you will have a "snapshot" of the current strengths, weaknesses, opportunities and threats in regard to organisational capacity. Use the snapshot to identify areas where there might be needed for capacity building.



Annex 2: Template for Partnership Agreements (optional)

The partnership agreement template is a relatively simple format, which can be changed and customised according to your need. The format should be completed in a language that both parties understand.

Partnership Agreement		
The partners	The partners in this agreement are:	
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> Insert the name of the local partner organization [Logo] Contact details: Insert name of the person responsible for the partnership Insert email/Skype address </td> <td style="width: 50%; padding: 5px;"> Insert the name of the Danish partner organisation [Logo] Contact details: Insert name of the person responsible for the partnership Insert email / Skype address </td> </tr> </table>	Insert the name of the local partner organization [Logo] Contact details: Insert name of the person responsible for the partnership Insert email/Skype address
Insert the name of the local partner organization [Logo] Contact details: Insert name of the person responsible for the partnership Insert email/Skype address	Insert the name of the Danish partner organisation [Logo] Contact details: Insert name of the person responsible for the partnership Insert email / Skype address	
Vision /goals of the partnership	<p>As partners we are committed to each other and share the following mutually agreed vision/goals for the partnership:</p> <p>Describe in brief the purpose of the partnership and the common visions for the cooperation</p>	
Key areas of cooperation and expected achievements	<p>We will collaborate on the following areas to achieve joint results:</p> <p>List the key areas of collaboration, indicate expected results and measurable indicators of achievements.</p>	
Principles governing the partnership	<p>In the spirit of partnership and mutuality, we commit to engaging in a partner relation characterised by respect, good communication and transparency. The partnership will be guided by the following jointly agreed principles of cooperation:</p>	

	<p>List the agreed governing principles. If the list is exceptionally long, include only key principles and attach the entire list as an annex to the partnership agreement.</p> <p>We are committed to monitor the compliance with the principles governing the partnership on a regular basis; at least in connection with [insert specific event at which the guidelines will be monitored].</p> <p>In case of conflict, we will resume to the mutually agreed principles governing the partnership. If the mutually agreed principles are significantly breached, the partnership may be reconsidered.</p>
<p>Roles, responsibilities and contributions</p>	<p>We work together as partners to achieve better results and greater impact for persons with disabilities and their organisations. We recognise that there are differences in what we each are able to contribute and emphasise Name of the OPD in the Global South role as implementer. In addition, the partners commit to the following roles, responsibilities and contributions:</p> <p>Name of the OPD in the Global South. roles, areas of responsibilities and contributions:</p> <p>Describe in bullet points all relevant roles, responsibilities, and contributions (the latter is both tangible and non-tangible contributions).</p> <p>Name of the Danish OPD roles, areas of responsibilities and contributions:</p> <p>Describe in bullet points all relevant roles, responsibilities, and contributions (the latter is both tangible and non-tangible contributions).</p>
<p>Communication</p>	<p>As partners we commit to an open and transparent dialogue within the partnership within the following framework:</p> <p>Notification: Describe in brief the extent to which the individual party is responsible to inform the other party of decisions and actions.</p> <p>Decision making: Describe in brief the type of decisions which must be made in common, and who must be involved in core decisions making processes in relation to the partnership and common activities.</p> <p>Communication lines: Describe in brief the key lines of communication, and who needs to be involved.</p>

<p>Partnership review</p>	<p>As partners we commit to conducting regular joint review of the partnership to confirm whether it is on track and meeting the agreements made, or if expectations and the governing rules of the cooperation needs to be redefined and commitment reaffirmed.</p> <p>A partnership review, including a review of this agreement will be conducted no later than: Click here to enter a date.</p>	
<p>Validity of the agreement</p>	<p>Enforcement of the agreement: This agreement shall enter into force when signed by all parties. The agreement shall remain into force until Click or tap to enter a date. unless one of the parties wish to terminate the agreement or violates the agreements made.</p> <p>Amendments to the agreement: Both parties may request amendments to the stipulations in the agreement. The implementation of such amendments will call for consensus between the parties. Agreed changes and amendments shall enter into force after the mutual signing of a revised agreement.</p> <p>Termination of the agreement: Both parties may give a written notice no less than indicate the number of months required months in advance to terminate the agreement. Before giving notice to terminate the agreement, both parties are obliged to make every effort to solve any disagreements or conflicts through negotiation in good faith.</p>	
<p>Corruption & PSEHA clause</p>	<p>As partners we agree that no offer, payment or benefit of any kind, which could be regarded as an illegal or corrupt practice shall be made, promised, sought or accepted -neither directly nor indirectly – as an inducement or reward in relation to joint actions funded under this agreement.</p> <p>As partners we also agree that Preventing Sexual Harassment, Exploitation, and Abuse (PSHEA) is a gross misconduct and violation of human rights. We will uphold a standard of zero tolerance of all forms of sexual harassment, exploitation and abuse, and address the abuse of authority by anyone affiliated with our organisation in a timely, principled and consistent manner.</p> <p>Any serious violation of this clause will be grounds for the immediate cancellation of this agreement.</p>	
<p>Signatures</p>	<p>Date: Click or tap to enter a date.</p> <p>_____</p>	<p>Date: Click or tap to enter a date.</p> <p>_____</p>

	Insert name of the person responsible for the partnership in the partner organisation	Insert name of the person responsible for the partnership in the Danish organisation
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Annex 3: How to establish the Principles Governing the Partnership Cooperation

The principles governing the partnership is a set of clear and jointly formulated principles affirming the rights and obligations of partners and a Charter for the spirit in which the partners envisage the partnership to be implemented.

The purpose of this tool is to support the partner dialogue on the principles (negotiable and non-negotiable) that should govern the partnership.

The tool is structured in accordance with the key principles of the Partnership Policy of the Danish Disability Movement, in order to safeguard that the partnership is based on respectful and trust-based relationships, shared purpose, joint action, mutual learning and accountability and transparency.

Note that it is up to the individual partners to determine the specific principles, decide on the exact wording and ensure agreement on what the principle in question entails, incl. the consequences if principles are not followed.

How to discuss and agree on the principles

It is advised to take their starting point in the five partnership principles stated in the Partnership Policy.

Note that the principles may be more or less specific, but they must be agreed upon, written down and subject to ongoing monitoring.

The following is a suggestion for how to discuss the principles with your partners. Please note that the examples of principles should not be seen as a checklist or a gross list of rules. The facilitators of the discussion are thus advised not necessarily to use the examples in the initial discussion.

1. Respectful and trust-based relationships

A respectful and trust-based relationship is about respecting the partner's mandate, obligations and independence and supporting the development and implementation of their strategies, policies and procedures.

Questions for discussion:

- *What means do we have to build trust within the partnership?*
- *What are the limits of interference (i.e. areas of non-interference) from our partner?*
- *Are there any non-negotiable expectations/conditions concerning the relationship between partners?*
- *How do we avoid creating unequal power relations based on unequal funding opportunities?*
- *What rules will help us create and protect a respectful and trust-based relationship?*

[sample principles] We agree to:

- Take the necessary time to get to know and understand each other, and to be open, honest and sharing in the relationship.
- Respect one another's development strategies and wishes – without withholding own ideas and opinions.
- Respect each other's right to make independent choices.
- Strive for equality and seek proactively to counter the power associated with funding by being transparent and open to questions by [name of the OPD in the Global South] related to any funding decisions, and ensuring that Danish volunteers and staff are sensitised on the power they hold and avoid any patronising/domineering attitudes and behaviours.
- Show solidarity so that the partner is certain it has an ally in its fight to improve the rights and living conditions of its members.
- Notify each other in a time fashion of changes in senior management, staff and board memberships of relevance to the partnership.

2. Shared purpose

A shared purpose and commitment are built on shared and mutually agreed values and goals. These values and goals constitute a key element in the partnership. The common goals and achievements of the partnership will be discussed and agreed on when

addressing the second and third section of the partnership agreement. Here the discussion is about “how” the cooperation on the shared values and goals ideally should unfold.

Questions for discussion:

- *How will we ensure that partners keep the same goals in mind?*
- *How do we make sure that partners keep matching each other's expectations and avoid conflicts?*
- *Are there any non-negotiable expectations/conditions concerning the partnership's shared purpose?*

What kind of principles will help us maintain our shared purpose and common goals?

[sample rules] We agree to:

- Adhere to our shared purpose and work diligently to achieve our common goals.
- Respect our mutual right to disagree if it does not conflict with the shared purpose and goals.
- Maintain a dialogue on strategic developments and consult with one another when developing, reviewing or modifying the strategic direction of the partnership
- Immediately inform each other if something is affecting our shared purpose and goals.

3. Joint actions/initiatives

Joint actions are about working together to achieve better results and greater impact for persons with disabilities and their organisations.

Question for discussion:

- *What do we respectively define as joint actions?*
- *How important are such joint actions to us?*
- *Are there any non-negotiable expectations/conditions concerning joint actions within the partnership?*
- *How do we ensure joint action and mutual participation without compromising the implementing role of the partner in the Global South?*

- *How do we ensure a transparent distribution and common understanding of roles and responsibilities when initiating joint actions?*
- *Are there any minimum standards or human rights principles that should guide our joint actions?*

What is our respective attitude and approach to involving other actors from within and outside the disability movement?

What kind of rules will help us initiate and implement joint actions?

[sample principles] We agree to:

- Involve both/all partners at concept, planning and strategy setting stages, but respect that [name of the OPD situated in the Global South] is the lead actor in identification, formulation, implementation, monitoring and evaluation of joint actions.
- Always define our respective roles and responsibilities in implementation and adhere to these.
- To uphold standards of good practice, with reference to the UNCRPD, specific project agreements, codes of conduct, standard operating procedures etc.
- Coordinate and engage with the broader disability movement, when possible/relevant.
- Notify one another of any relevant changes of staff or circumstances that could have an impact on the support to joint actions.

[Examples of additional commitments by the two parties]

The Danish partner commits to:

- Contribute more than financial inputs.
- Provide specific technical assistance upon request and respond to organisational and programme development needs.
- Give [name of the OPD in the Global South] opportunities to evaluate any technical assistance, advice and training and provide feedback on quality and relevance.
- Respond to reports and communications according to agreed deadlines for feedback during the duration of the partnership.
- Make available funding for approved projects according to the agreed schedules, subject to satisfactory progress on the project, compliance with reporting requirements and the organisation's continued availability of resources.

- Not to interrupt an agreed funding schedule without prior discussion except in the case of actual or suspected misuse of funds.
- Notify [name of the OPD in the Global South] of any appropriate opportunities for institutional funding (e.g. Danida and EU) and to seek the consent of the partner before applying for such funding .
- Except in exceptional circumstances, plan visits to [name of the OPD in the Global South] or specific projects with the partner to identify mutually suitable dates, taking into consideration the schedule and workload of the partner.

[name of the OPD in the Global South] commits to:

- Abide by the terms of applicable Grant Agreement and notify [name of the Danish OPD] of any foreseen difficulties in complying with the requirements of the agreement.
- Participate, where practicable, in non-project related initiatives in advocacy, networking, capacity building, and the facilitation of visits from [name of the Danish OPD]
- Support [name of the Danish OPD] in meeting its external accountability and reporting obligations by cooperating with requests for information, reports and evaluations.
- Notify [name of the Danish OPD] of any incident or concerns [including security issues] arising which may impact the partnership and the joint actions.

4. Mutual learning

Learning arises from any cooperation and a shared learning environment is regarded beneficial to partnerships and joint actions.

Question for discussion:

- *How important is it to create a mutual learning environment within the partnership?*
- *Are there any non-negotiable expectations/conditions concerning joint learning?*
- *How do we best create a learning environment where relevant best/promising practices and challenges) and results are documented and shared systematically?*

- *What kind of guidelines will help us create strong learning practices and reflect on and learn from successes and mistakes?*

[sample rules] We agree to:

- Commit to capacity development and strive to be learning organisations.
- Share information and ensure equal access to relevant information for everyone.
- Have a systematic approach to documenting the results of our partnership and joint actions, and to identifying best/promising practices, challenges etc.
- Be open to and engage in learning reviews, evaluations etc.
- Allocate time for regular joint reflection on learnings.
- Treat difficulties as shared problems and discuss them constructively.
- Strive to apply learning systematically in joint and individual practices.
- Share learning with other relevant stakeholders.

5. Mutual accountability:

Mutual accountability helps to build strong organisations and strong relationships where partners are transparent and answerable to each other as well as to the members and communities they serve and to other stakeholders.

The principle of mutual transparency and accountability applies to decision-making, joint actions, communication, financials, delivery of results, etc. From the outset, we base our partnerships on equal rights and mutually agreed obligations and will endeavour to treat difficulties and conflicts as shared problems and seek to find common solutions.

Generally, we believe that an open and transparent dialogue between partners enhances ownership and trust which is imperative for a successful partnership.

Question for discussion:

- *What is needed to maintain an open and transparent dialogue between partners?*
- *What norms exist that are “usual but harmful” to transparency and accountability within the context of the partnership and how do these potentially affect the partnership?*
- *Are there any non-negotiable expectations/conditions concerning mutual accountability?*

- *Do we need specific mechanisms to ensure transparency and accountability in cooperation and decision-making within the partnership?*
- *What level of flexibility is required within the partnership, and how do we avoid placing greater demands on communication and reporting than need be?*
- *How do we avoid corruption within the partnership? And how do we deal with it in case it happens?*
- *How do we avoid cases of Sexual Harassment, Exploitation, Abuse (SHEA) within the partnership? And how do we deal with cases should they still arise?*
- *What kind of rules will nurture and support transparency and accountability between partners and towards other stakeholders?*

[sample rules] We agree to:

- Exercise transparent decision-making in relation to the collaboration with a clear indication of which decisions are made where.
- Exercise flexibility and proportional levels of bureaucracy in management and communication, not placing greater demands on reporting than need be and ensuring regular communication, follow-up and feed-back.
- Respect agreements, including mutually agreed procedures, deadlines, etc.
- Demonstrate mutual transparency and accountability in the financial relationships and adhere to joint anti-corruption guidelines, whistle-blower policies, etc.
- Maintain appropriate accounting standards and record keeping and ensure that expenses do not fall significantly outside the agreed purpose.
- Be accountable to our boards, members, donors and ultimately to our intended beneficiaries.
- Actively Prevent Sexual Exploitation, Abuse and Harassment by installing reporting mechanisms and ensuring a swift and credible investigation if anyone associated with our organisations are suspected of violations and to ensure appropriate sanctions in the case of violation.
- Obtain permission from the partner before using their name in any fundraising, advocacy or publicity activity and to guard against the misuse of data or information held about the organisation.
- Review the partnership and its agreements regularly.

Where to state the governing principles

The governing principles should form part of a partnership agreement (or MoU). By including the principles in the partnership agreement, you ensure that they play a central role in the partnership, that they are available as a reference and subject to review when the partnership is evaluated.

Annex 4: Sample Code of Conducts to safeguard Anti-Corruption and the Prevention of Sexual Harassment, Exploitation and Abuse.

Corruption and sexual harassment, exploitation and abuse are areas that can seriously damage a partnership, an image and reputation.

This reference document provides examples of measures for preventing corruption and sexual harassment, exploitation and abuse within the partnership. This is done by sharing sample Code of Conduct on these two important areas.

Preventing Corruption

Corruption exists everywhere and is deeply rooted in many cultures. It is therefore recommended to engage in dialogue on how to avoid corruption, maintain a policy of zero tolerance towards corruption in all its forms and react promptly in cases of suspected or documented fraudulent behaviour, abuse of funds, nepotism etc.

Such dialogue can be arranged in connection with the discussion of the Governing Rules of the partnership and be formulated as an Anti-corruption Code of Conduct that includes ethics and behaviours in relation to corruption.

Sample Anti-Corruption Code of Conduct*

As partners we are committed to adhere to the ethical principles as defined in this Code of Conduct.

1. We will avoid any conflict – real or potential – between our personal interests and the interests of our organisations and donors.
2. We will not give or accept bribery in any form.
3. We will not for private purposes seek to influence any person or body by using our official position or by using force or threats.
4. We will not use deception, trickery or breach of confidence to gain an unfair or dishonest advantage.
5. We will not misappropriate or otherwise divert property or funds entrusted to us.
6. We will not give, solicit or receive directly or indirectly any gift or other favours that may influence the exercise of our function, performance of duty or judgement. This does not include conventional hospitality or minor gifts.

7. We will not favour friends, family or other close personal relations in recruitment, procurement, aid delivery, consular services or other situations.
8. We will report any evidence or reasonable suspicion of breach of this Code of Conduct.

**The Sample Code of Conduct is informed by the Anti-corruption Policy by the Danish Ministry of Foreign Affairs. For additional inspiration please refer to Danida's [Anti-corruption policy](#).*

In the partnership agreement following corruption clause is suggested:

“As partners we agree that no offer, payment or benefit of any kind, which could be regarded as an illegal or corrupt practice shall be made, promised, sought or accepted - neither directly nor indirectly – as an inducement or reward in relation to joint actions funded under this agreement.

Any serious violations of this clause will be grounds for the immediate cancellation of this agreement.”

Preventing Sexual Harassment, Exploitation, and Abuse (PSHEA)

Sexual harassment, exploitation, and abuse exist in all cultures and potentially affect all sectors of life including Civil Society work. It is an expression of gross misconduct and human rights offences. The presence of sexual harassment, exploitation, and abuse undermines an organisation's overall professional standing and negatively impacts moral and development outcomes. It is therefore advised to engage in dialogue on how to prevent sexual harassment, exploitation, and abuse, maintain a policy of zero tolerance towards it in all its forms and react promptly in cases of suspected or documented abuse of authority.

Such dialogue can be arranged in connection with the discussion of the Governing Rules of the partnership and be formulated as a PSHEA Code of Conduct that includes ethics and behaviours regarding sexual harassment, exploitation, and abuse.

Sample PSHEA Code of Conduct*

As partners we are committed to adhere to the ethical principles as defined in this Code of Conduct. We will uphold a standard of zero tolerance of all forms of harassment and

discrimination and will refrain from abuse of power within our offices or outside especially in dealing with members and beneficiaries.

We will promote the values of respect, fairness, inclusivity and integrity and relate respectfully and equally to all persons irrespective of the type and degree of disability, ethnicity, gender, age sexuality, or social position and abstain from anything that could be interpreted as degrading or putting others down.

We regard Sexual Harassment, Exploration and Abuse a gross misconduct and human rights offences. As partners we agree that:

9. Our management, staff and volunteers must refrain from any form of sexually exploitative and abusive behaviour involving colleagues, members or beneficiaries.
10. Sexual activity with children (persons under the age of 18) is prohibited, regardless of the age of majority or age of consent locally. Mistaken belief regarding the age of a child is not a defence. Exchange of money, employment, goods, or services for sex — including sexual favours or other forms of humiliating, degrading, or exploitative behaviour — is prohibited. This includes exchange of assistance that is due to beneficiaries.
11. Sexual relationships between staff and/or beneficiaries is strongly discouraged.
12. Mandatory reporting: If a staff member has concerns or suspicions regarding SHEA of a fellow worker, whether in his/her own organisation or the partner organisation, he/she must report such concerns through established reporting mechanisms.

The Code of Conduct expresses the commitment of management and staff members in both organisations to adhere to and to promote high ethical standards. Managers at all levels have a particular responsibility to support and develop standards that promote an environment of zero tolerance of all forms of harassment and discrimination.

We expect that every board member, manager, staff member, assistant, volunteer and consultant involved in partnership activities to read and understand the Code and abide by its guidelines.

*The Sample Code of Conduct is informed by the SHEA Toolkit from Chemonics.

For more information, please refer to the UN Secretary-General's bulletin for [addressing discrimination, harassment, including sexual harassment, and abuse of authority](#) and the [SHEA Toolkit](#) from Chemonics.

In the partnership agreement following PSHEA clause is suggested:

"As partners we agree that Sexual Harassment, Exploitation, and Abuse is gross misconduct and human rights offences. We will uphold a standard of zero tolerance of all forms of sexual harassment, exploitation and abuse, and address the abuse of authority by any of our leaders, staff or volunteers in a timely and consistently manner.

Any serious violations of this clause will be grounds for the immediate cancellation of this agreement."

Annex 5: Template for Partnership Assessment Format

The following format will help you to examine the status of your partnership; to determine if it is strong and meets the key partnership principles or whether there are areas where you can enhance cooperation.

The format can be filled as a preparation for a partnership consultation/workshop.

COMMON VISIONS & AREAS OF COOPERATION	YES	PARTIAL	NO
Do you know the history and activities of your partner?			
Are the goals of the partnership cooperation clear?			
Are key areas of collaboration and expected achievements clearly defined?			
Do you feel that the principles set to govern the partnership are respected?			
Is there an appropriate balance between joint actions and the capacity and the size of your organisations?			

EQUALITY & RECIPROCITY IN THE COOPERATION	YES	PARTIAL	NO
Do you make decisions on essential partnership issues and joint actions in common?			
Are the partner's roles and areas of responsibility clearly defined?			
Are the partners contribution to the cooperation mutually acknowledged?			
Do you meet regularly to carry out joint actions/monitoring or to plan new initiatives?			
Are both parties' wishes, ideas for cooperation taken equally into account?			

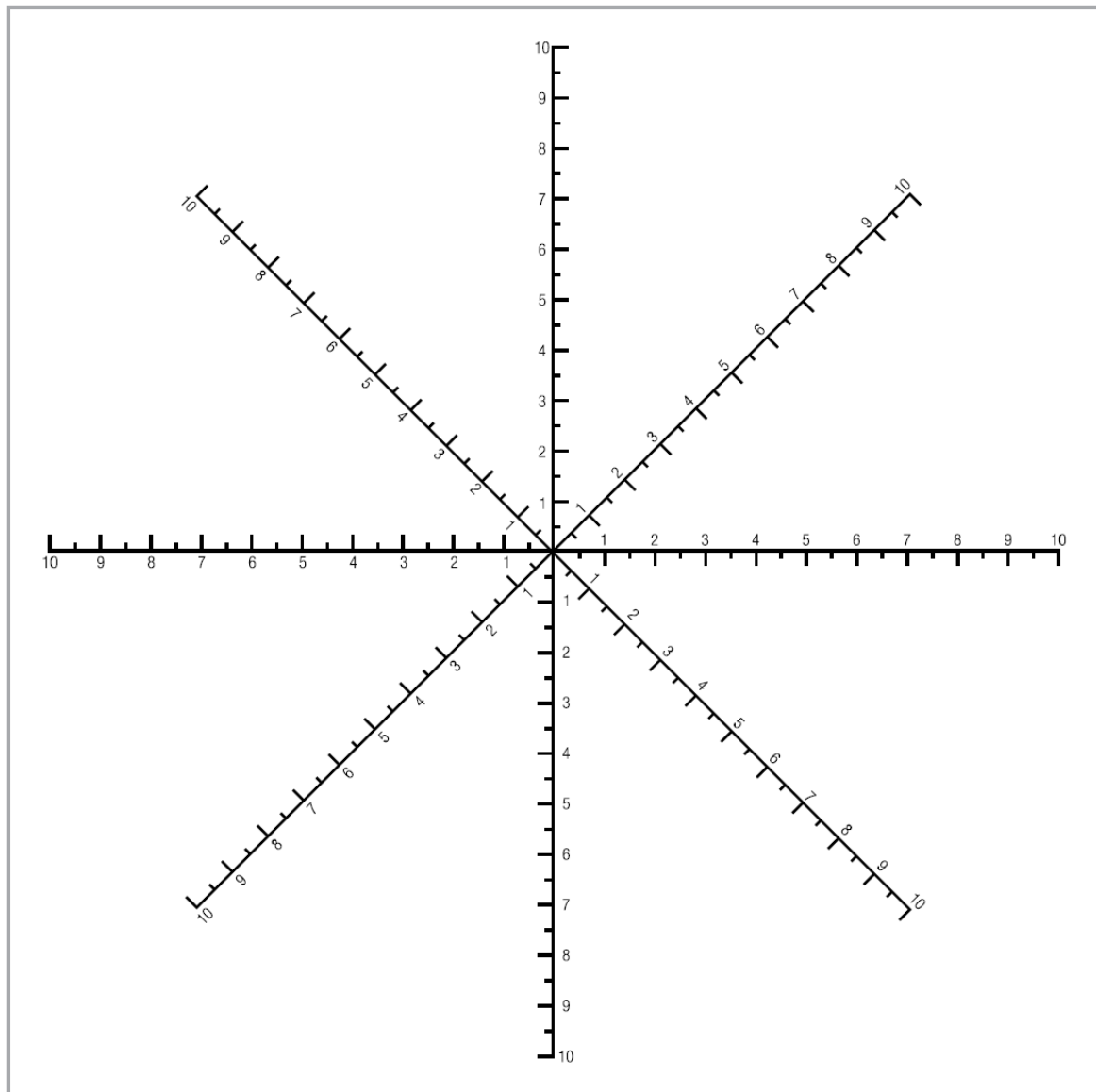
RESPONSIBILITY & OPENNESS IN THE COOPERATION	YES	PARTIAL	NO
Do you have regular contact with your partner?			
Are planned activities implemented and reported within the agreed timeframe?			
Do you always provide the agreed feedback to communication from your partner?			

Do you always receive the agreed feedback from your partner?			
Do you know if your partner is partnering/working with others?			
Do you know the funding sources of your partner?			
Do you feel that you can openly share your challenges with your partner?			
Do you trust your partner?			

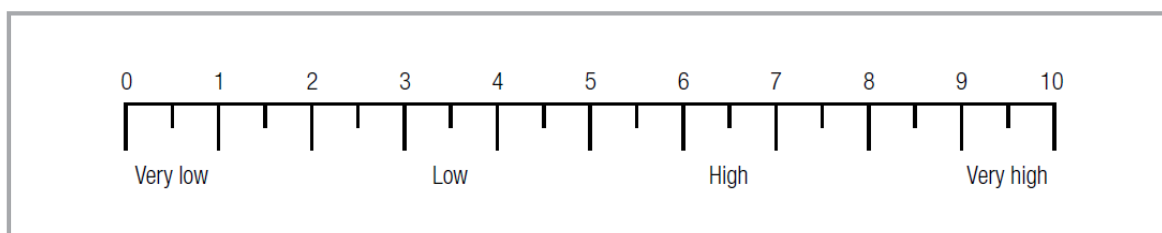
LONG-TERM & SUSTAINABLE COOPERATION	YES	PARTIAL	NO
Have both parties committed themselves to a long-term cooperation?			
Does the partner in the Global South have adequate capacity to continue its work if the partnership terminates?			
Have you agreed on the timeframe for the cooperation?			
Do you have a phase-out strategy/plan for the cooperation?			

Annex 6: Template for Spider Diagram

The following is a template for the spider diagram used in Tool 4. The template can be used for making the handouts for the exercise.



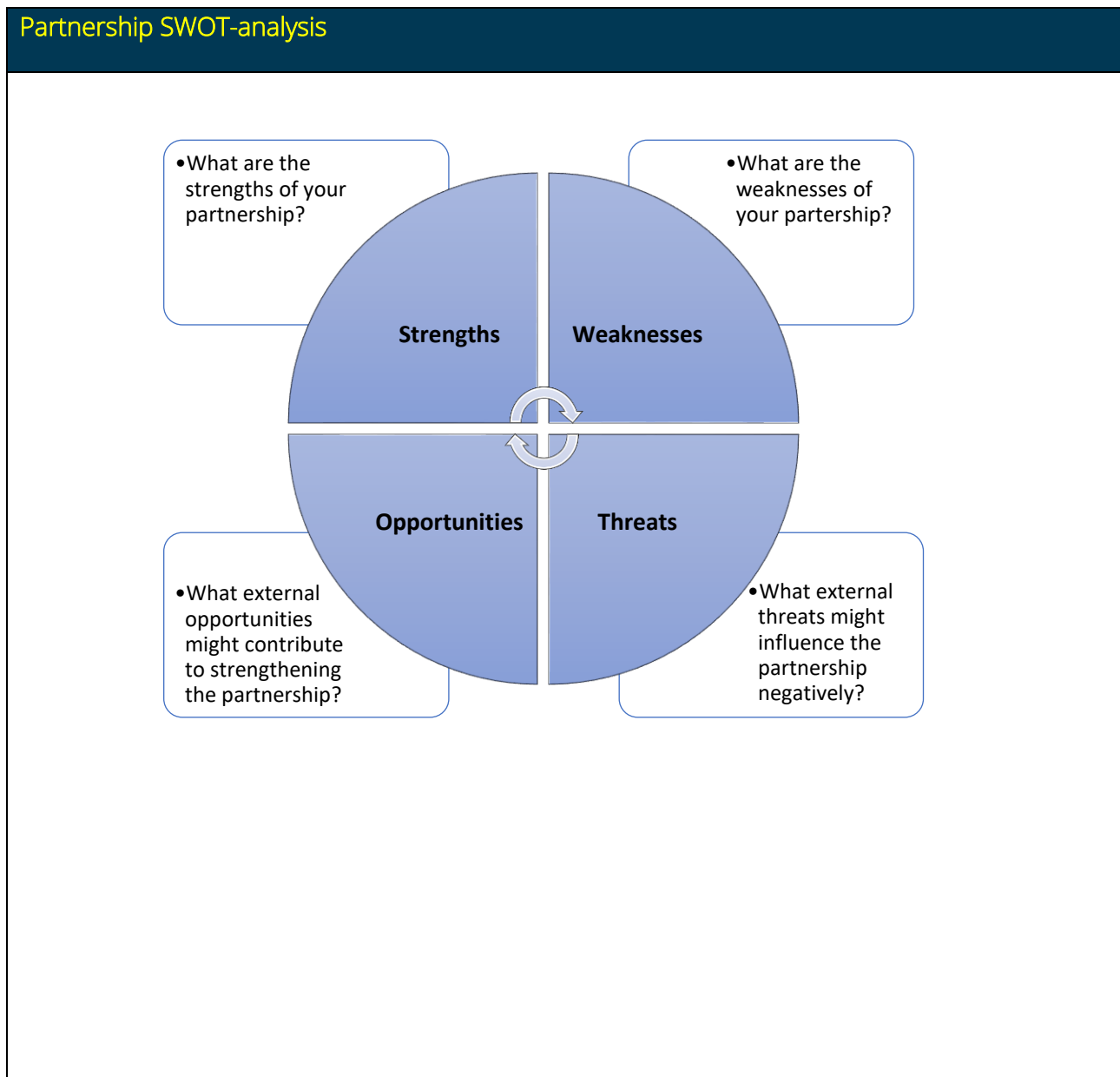
Key



Annex 7: Partnership assessment - SWOT-analysis

The SWOT-analysis can also help you to examine your partnership. As with the SWOT analysis of organisational capacity, you begin the analysis by brainstorming on the question in the upper left corner of the figure: *What are the strengths of your partnership?* Write down all the strengths on separate pieces of paper and placed them so that they can be seen and read by everyone. Continue clockwise to the next question.

The partnership SWOT analysis should ideally be conducted jointly by partners, to provide a “snapshot” of the current strengths, weaknesses, opportunities and threats of your partnership. Use the snapshot to discuss (and make a plan) how you can eliminate or minimize the identified weaknesses, exploit the opportunities, protect you-self against threats and maintain forces.



Annex 8: Example of an exit matrix

Timeframe	2021 - 2024	2025 - 2026
Components	Overall benchmarks for a sustainable exit	
Operation of the organisation - organisational and financial sustainability	<ul style="list-style-type: none"> • Proven ability to comply with own statutes. • Representative of its members in terms of age, gender and geographical coverage. • Proven ability to organize and govern members in a democratic manner. • Ability to show concrete results of advocacy work for improved life conditions of PwDs. • Forms part of the national disability movement 	
	<ul style="list-style-type: none"> • Proven ability to finance all expenses related to board meetings and transport to general meetings of the local branches. • Proven ability to cover at least 50% of the costs of participating in international events. • The Danish partner finances maximum 50% of the costs of general meetings. • At least 50% of the administrative costs of the organisation is financed by sources other than the Danish partner. 	<ul style="list-style-type: none"> • Proven ability to finance all expenses related to board meetings and transport to general meetings of the local branches. • Proven ability to cover all costs of participating in international events. • The Danish partner finances maximum 25% of the costs of general meetings. • At least 75% of the administrative costs of the organisation is financed by sources other than the Danish partner.
Joint actions	<ul style="list-style-type: none"> • Funds for joint actions do not exceed the income the partner has from national 	<ul style="list-style-type: none"> • Funds for joint actions do not exceed 20% of the partner's total income.

	<p>sources (government, own resources, private companies and other institutions)</p> <p>OR</p> <ul style="list-style-type: none"> • Funds for joint actions do not exceed 30% of the partner's total income. • Expenditure on staff and administration for joint actions do not exceed 35% 	<ul style="list-style-type: none"> • Expenditure on staff and administration for joint actions do not exceed 20%. • The partner covers all investment costs.
Services to PwDs	<ul style="list-style-type: none"> • The percentage of support for service from the Danish partner does not exceed 25% of the budget for services. • Support to the following service is phase out: scholarships, accessibility in private homes and sporting events. 	<ul style="list-style-type: none"> • The percentage of support for service from the Danish partner does not exceed 10% of the budget for services. • The partner or other stakeholders have taken over the responsibility for continuing service programs such as scholarships, labour market integration and accessibility in own homes, and sporting events.
Local resource mobilization	<ul style="list-style-type: none"> • A fundraising strategy in place. 	<ul style="list-style-type: none"> • Ability to show results of local resource mobilization / fundraising.
Post exit		<ul style="list-style-type: none"> • A plan specifying the terms for and content of a continued relationship.