The Nature Conservancy.
Protecting nature. Preserving life.

**PARTNERSHIP PERFORMANCE
MONITORING TOOL**
Mesoamerica and the Caribbean
Conservation Partnership Program

*By 2015, The Nature Conservancy will work with others to ensure the effective conservation
of places that represent at least 10 percent of every major habitat type in every
biogeographical realm on Earth.*

For The Nature Conservancy (TNC), partnering is one of the fundamental strategies to achieve the 2015 Goal. It is chiefly through partnering that TNC implements projects to accomplish its conservation objectives.

Hence, monitoring and evaluation of our partnerships is of paramount importance since it helps us identify necessary improvements to achieve the conservation objectives. Moreover proper monitoring and evaluation, foster mutual trust (Lusthaus, 2006)[2] and learning.

The following tool monitors the relationship performance between TNC and a partner[3]. It is designed around a methodological framework that includes three partnership monitoring and evaluation components (Charles and MacNulty, 1999):

1. Partnership impact on work being done, project partners, and society

2. Institutional capabilities of both partnerships

3. The relationship development between the partners.

This tool specifically addresses the third component.

What is the monitoring tool for?

This tool supports *TNC staff in improving the relationship with each partner organization in order to best achieve current and future project goals.*

It specifically contributes to:

- Encourage periodical analysis between TNC and the partner on the development of the partnership relation.
- Identify areas of improvement
- Develop a plan to improve the relationship

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[1] The first version of this tool was developed by International Conservation Leadership.
[2] Trust is a key element for partnership sustainability (Lusthaus, 2006).
[3] In 2005, TNC and several partners developed the Coalition tool for the conservation of protected areas: *Assessment and Strengthening Guide*. This tool has been designed to assess multilateral relationships.

> The tool creates a dialog space about the relationship development of TNC and a partner organization. It also encourages the systematic analysis of the attitudes and behaviors of both organizations that influence the relationship.

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Who uses this tool?

People who use this monitoring tool are:

- Site Managers (In the event that another person manages the partner organization relationships, he/she will use the tool)
- Partner representatives in charge of the relationship with TNC, who, therefore, know this relationship very well.

Two suggestions for the use of the tool:

- Ask the partnership specialists for support
- In the event of serious conflict the partner organization, look for   external mediation services.

When to use this tool?

We suggest using the monitoring tool at least once a year in combination with other project monitoring tools that may exist. If you do not have a monitoring schedule, establish one, soon, with each partner organization.

When to use this tool will depend on the relationship history with each partner.

- For new relationships we suggest implementing within six months to one year after the relationship has started.

- If working with organizations that already have a partnering record with TNC, use the tool for the first time at the beginning of a new project.

In both cases, if the project started more than one year ago, try to include the tool in the next closest monitoring activity.

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[4] This tool is part of a monitoring and assessment system that is under construction. Once this system starts working, the appropriate time to use it will be defined.

How is the tool structured?

The tool has three matrixes for the assessment of six relationship areas and the development of a strengthening plan, between TNC and the partner organization.

Matrix 1   **Relationship Condition Assessment:** Helps frame the conversation on the six relationship areas: communication between partners; trust; respect; interdependency and shared resources; mutual feedback and learning; negotiation; and conflict resolution. Each area has several items that pose ideal situations in the relationship. The areas and items come out of the TNC partnering principles as described in the document "Partnerships: A Conceptual Approach"

Matrix 2   **Identification of Areas that Facilitate/Obstruct Relationship Development.** Identifies the areas in the relationship that need improvement; and, it identifies the relationship' strengths. It contains the same relationship areas as matrix 1

Matrix 3   **Relationship Performance Strengthening Plan.** A format for documenting actions, dates, and people in charge, as jointly agreed, to strengthen the relationship.

How to use the tool:

The following are the monitoring management step suggested:

Step 1   Invite your partner to participate in the partnership relationship monitoring process. Explain the purpose of the procedure   and send him/her a copy of this document.

Step 2   Appoint a meeting (three-hour at least) with representatives from both partnerships (See *Who uses this tool?)*

Step 3   At the beginning of the meeting, insure that participants clearly understand the purpose of the discussion and the use of the tool.

Step 4   Together with your partner, modify those areas and items in Matrix 1 that need to be adapted to your specific situation, and add up those that are missing. This is a fundamental step to promote appropriation and increase this tool performance for both parties.

Step 5   Using Matrix 1, try to agree on the frequency of occurrence of expected situations as described by the items in each area. In Column 2, write down the following qualifying terms according to frequency: *never, seldom, regularly, always.* In the event that you do not agree on the frequency of occurrence, write down the terms that best fit your own situation. In Column 3, explain your answers

Step 6   Using Matrix 2, check if each area is inclined to facilitate or obstruct the relationship. In the second column, write down an F for facilitating and an O for obstructing the relationship. Write down your comments in the third column.

Step 7   Using Matrix 3, write down the areas that obstruct the relationship development. Under each area, write the necessary actions to improve the relationship. These actions may include competence strengthening (skills, knowledge, attitudes) and changes in TNC as well as each partner's work procedures. In the second column, record the implementation date for each action; in the third column, record the name of the person who will be in charge of implementing actions.

Step 8   Send a copy of the matrixes with the complete information to the partnership specialist so that he/she can assist with follow-up to the partnership strengthening plan.

Step 9   Send a copy of the complete matrix to the partner representatives so that they can also track follow-up actions.

Bibliography

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Lusthaus, C. con C. Milton-Feasby. 2006. *The Evaluation of Inter-Organizational Relationships in the Not-for-Profit Sector: some observations.* Universalia Management Group. www.universalia.com/files/inter.pdf

Suggested Readings

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Halliday, J., S.N.M. Asthana and S. Richardson. 2004. Evaluating Partnership: The Role of Formal Assessment Tools. Evaluation 10(3): 285-303.

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Matrix 1: Relationship Condition Assessment

Area/Item	*Frequency* (never, seldom, usually, always)	*Explain your answer*
COMMUNICATION		
Formal communication frequency between the partners is enough to achieve the project's goals.		
There are enough informal communication spaces (unplanned) to achieve the project's goals.		.
Communication is clear; therefore, each partner's expectations are clear to both parties.		
The time partners devote to communicate is enough to achieve the project's goals.		
The partners use and respect the existing communication channels.		.
Additional Item: Dates are set in advance for partners to get together and discuss project progress		
TRUST AND RESPECT		
The partners mutually express their opinion openly and constructively.		
Each partner informs the other about any relevant action or statement that might affect the other.		.
None of the partners criticize the other negatively in the presence of other organizations.		
Each partner respects the procedures implemented by the other.		
Each partner understands and respects the mission, the goals, and regulations of the other.		.
Additional Item: The partners agree on joint procedures to achieve the project's goals.		
MUTUAL DEPENDENCY AND SHARED RESOURCES		
Each partner states, privately and publicly, that it values the contributions from the other party to achieve joint success.		
The partners offer the necessary help and support to achieve joint success		
Additional item: The partners jointly determine the use of resources		

Area/Item	Frequency (never, seldom, usually, always)	Explain your answer
MUTUAL FEEDBACK AND LEARNING		
The partners provide feedback to each other constructively.		
Each partner acknowledges what it has learned from the other.		.
Additional Item: The proper and established channels are used for providing feedback		
NEGOTIATION		
During negotiation, the partners put forth their best effort to listen to the other and understand each others points of view.		. .
The partners try to get to agreements by considering each other's interests on relevant aspects of the project.		
When the partners understand the objectives clearly, they are flexible in terms of selection or modification.		.
Additional Item: Roles and responsibilities are clear and understood by all		
CONFLICT RESOLUTION		
The partners recognize that conflicts are inherent in the development of any relationship.		.
The partners identify and confront existing conflicts.		.
The partners work toward the identification of creative conflict solutions.		
The partners comply with their commitment to overcome the identified conflicts.		
Additional Item		
END OF THE PARTNERSHIP		
The partnership has defined procedures for a successful termination of the relationship (exit strategy)		.
Other Areas:		
Additional Item:		

Matrix 2: Identification of Relationship Development Facilitating/Obstructing Areas

Area	Condition (F=facilitate O=obstruct N=neuter)	Comments
Communication		
Trust and Respect	.	
Mutual Dependency and Shared Resources		
Mutual Feedback and Learning		
Negotiation	.	
Conflict Resolution		

Matrix 3: Relationship Performance Strengthening Plan

Improvement Area/Agreed Action	*Verification Date*	**Manager**
Area:		
Action 1		
Action 2		
Area:		
Action 1		
Action 2		
Area:		
Action 1		
Action 2		