Moving On

Effective Management for Partnership Transitions, Transformations and Exits

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Introduction

Ros Tennyson, Director, The Partnering Initiative

In April 2005, Eva Halper and I were running a workshop on partnering skills for a German Foundation. Towards the end of the session, one of the participants asked the question: *How does one manage an exit strategy successfully?* Caught slightly off-guard I heard myself saying: *By doing everything one would do to build a partnership, but backwards.* This was not a thought through response. Indeed, at the time, I thought myself quite lucky to have got away with it! But on the journey home, we thought further about both the question and my answer.

It was, I believe, that unexpected question on exit strategies, my impromptu answer and our subsequent conversation that prompted this publication.

What I had meant, of course, was that managing the concluding phase of a partner relationship should be conducted with exactly the same degree of care and attention to detail as managing the building phase – so that nothing is left incomplete or to chance. In my imagination (in fact linking it intuitively to the closing phases of my own partnerships – whether professional or personal) it seemed to me that messy endings virtually guarantee that the value of what has gone on before, however good, is seriously undermined and marginalised. I still believe this to be true.

Managing the concluding phase of a partner relationship should be conducted with exactly the same degree of care and attention to detail as managing the building phase – so that nothing is left incomplete or to chance.

Over time, however, other elements intruded my thinking. For example, how does a term like 'exit strategy' play out in a partnership scenario?

In cross-sector partnerships, partners come from business, government and / or civil society organisations. These typically have very different organisational cultures that are reflected both in uses of language and in the ways of articulating (sometimes very similar) ideas. Using plain language and avoiding jargon helps throughout the process of collaboration but it is, I believe, particularly important when partnerships come towards a final stage. So how does this apply to the term 'exit'?

Typically donors (and sometimes partners – especially those providing most of the funding) talk in terms of 'exit strategies'. This implies something one-sided (ie not necessarily mutually agreed), final (ie not assuming a further connection or new horizons) and calculated in advance (ie not co-created as part of the partnership). Our experience of partnerships for sustainable development suggests that the term 'exit strategy' is an unhelpful one, especially as in the best scenarios, partners keep in touch, evolve new initiatives and remain connected well after their initial programme of work is completed.

Since the term 'exit strategy' has the potentially negative implications for a partnership indicated above, it may be that it is simply an inappropriate term.

This is not just semantics. Of course, there comes a point when the initial work is completed, and partners hand over long-term responsibility to a more permanent structure. And, of course, some partnerships actually collapse – having proved unable to hold together under pressures of one kind or another. But it is also true that many partners re-build a partnership to develop new initiatives so a closure has actually led to a new opening. But do all (or any) of these actually qualify as an 'exit'?

Our view is that the term 'exit' is simply too blunt to cover the range of possibilities facing partners and that the term 'moving on' is far more appropriate since it can encompass all the scenarios described above and it does so in a suitably fluid, open-ended and constructive way.

Working on this topic over the past two years in preparation for this publication has given us the opportunity to test this idea, by looking systematically at a number of partnerships undergoing various forms of transition and transformation. Many of those we studied have had uncomfortable moments for those involved – sometimes turbulent would be a more apt description – and that has also given us food for thought.

Our view is that the term 'exit' is simply too blunt to cover the range of possibilities facing partners and that the term 'moving on' is far more appropriate since it can encompass all the scenarios described above and it does so in a suitably fluid, open-ended and constructive way.

Perhaps a partnering approach is never entirely comfortable or safe – nor should it be if it is seeking to challenge and change conventional ways of operating. As partnership advocates and practitioners, perhaps we are all too eager to record only the positive and to imply that there is a simple route map from the presenting problem to the partnership solution.

Actually partnering – like life – can be pretty messy. And perhaps this is the whole point.

Some of the most valuable partnering experiments have failed – at least in terms of delivering according to the original intention, although they have succeeded in challenging the status quo and in contributing to changing the rules of the game. Some of the most innovative and powerful transformations have been triggered by crises in the partner relationships or by the changing context in which the partnership is operating. If, as we firmly believe, partnering is about sharing (not mitigating) risk and about co-creating (not dictating) solutions, the partnering process – including moving on – requires some pretty fundamental changes in behaviour, assumptions and thinking.

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Our observations suggest that partnership is less about imposing a blueprint and more about managing a level of chaos. Partnerships are, at their heart, vehicles for transformation.

We hope that this publication will be a prompt for further discussion around this critically important aspect of partnering – focused as it is less on providing guidelines for closure and more on understanding the evolving processes within and beyond the boundaries of the partnership. If it assists partnership practitioners in adding to their body of knowledge and practise of managing partnerships, that is good, but if it stimulates some radical reappraisal about the fundamental nature of a partnering approach, that is even better!

I believe this new addition to our Tool Book series will play as important a part as the preceding four have done in helping to support partnership practitioners in their work and in building ever greater rigour in the partnership paradigm. I would also like to take this opportunity to thank Eva for her invaluable work on this topic and for her equally invaluable contribution to The Partnering Initiative in her role as its first Development Director.

1

Sustaining outcomes

The starting point

It is surprising how often quite complex cross-sector partnerships for sustainable development are established with very little exploration or articulation of the intended end point except so far as it pertains to the achievement of the agreed project or programme.

Of course, there can be real merit in early stage pre-partnership discussions being very open and exploratory in nature. Indeed, such conversations have been catalysts for the creation of highly innovative partnerships. However, at the point of actually committing to a partnership (usually when some form of partnering agreement is signed) one might expect the partners to have: articulated a clear timeline for their involvement; agreed a plan for sustaining the outcomes of their activities and explored to some extent the potential of the partnership in the longer-term.

Most partnerships are voluntary in nature, and perhaps this means the planning phase is looser and not as rigorous as less voluntary alternatives. Or maybe it is because partnerships are a comparatively new way of operating and so there are still relatively few conventions or rules to follow. Or perhaps the concept of moving on is simply an uncomfortable topic to broach in the early phases of partner relationships.

In any event, it is not uncommon for partners to agree to partner with quite different underlying assumptions and expectations about the longevity and legacy of their collaboration and to be quite surprised to discover this discrepancy at a comparatively late stage in their partnership.

Partnering requires commitment, time and a level of continuous engagement. No one has time to partner for the sake of partnering!

Partnering requires commitment, time and a level of continuous engagement. No one has time to partner for the sake of partnering! A decision to partner is taken when there is a serious expectation that significant results will be achieved more effectively together than could have been achieved through other single sector solutions or ways of working.

Some partnerships may end up evolving into permanent mechanisms for delivering sustainable development goals – in effect they transform themselves into a new kind of institution that no longer operates as a partnership. In other situations partnerships will develop and pilot an initiative with the explicit intention of handing it over, when the conditions are right, to a more mainstream delivery mechanism.

If this analysis is correct, we might begin to conclude that most partnerships for sustainable development are, in fact, temporary arrangements. This means that it is of particular importance that the positive outcomes and impacts of their interventions are sustainable. Sustaining outcomes should, therefore, be a priority for all partners from the start of any partnership, regardless of how the partnership will evolve over time or its ultimate life span.

If, as we suggest should be the case, the partnership is focussed from the earliest stages on how the outcomes of its work will be sustained, partners will have been regularly considering their next steps and the idea of moving on will be embedded in the way the partners plan and move forwards. Where this is not the case, introducing a moving on conversation can be experienced by partners as a bit of a bombshell causing them to revert to earlier 'positions' thereby doing some significant damage to the trust that has been established between the partners over their time of working together.

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Moving on is complex for many reasons. Firstly, the cross-sector (Government, Business, NGO, International Agencies) and multi-stakeholder nature of the collaboration can itself create misunderstandings – each sector having different priorities, attitudes and approaches. For example, in business, moving on is a natural part of doing business.

Secondly, the different role of each organisation (funder, facilitator, implementer – and even beneficiary) in the partnership will also affect how that organisation views moving on. Anyone can initiate the moving on process – but everyone will be affected by it, albeit in different ways.

Furthermore, all kinds of psychological factors come into play when partners think about moving on.[1] Therefore managing the discussions with emotional intelligence is important.

(See Tool 1 Prompts for a moving on conversation)

Where partners are dedicated to ensuring that the outcomes of their work will be sustained, they will want to be confident that whatever long-term management is in place it will be:

- Capable of providing the leadership, resources, skills, infrastructure needed
- Able to secure and sustain the 'buy-in' of relevant key players / stakeholders
- Confident in its implementation capacity
- Willing to recognise and attribute the work of the original partnership

It is hardly surprising that partners will need to plan and prepare for long-term arrangements to sustain the outcomes of their partnership activities and interventions.

[1] For an interesting discussion of exiting in a business context see *Learning to let go: Making better exit decisions*, John T Horn, Da P Lovallo and S Patrick Viguerie in The McKinsey Quarterly 2006 No. 2

TOOL 1

PROMPTS FOR A MOVING ON CONVERSATION

1

GROUND RULES FOR 1-2-1 CONVERSATIONS	• Choose your timing well – is this the best moment for such a conversation? • Decide who would be the best person with whom to discuss the issue (not necessarily the most obvious one – such as the broker) • Set the scene – explain your perspective and what is prompting this conversation • Present your opening statement or question objectively – take care that the person you are talking to does not take your remarks personally • Refer to the history of the partnership and present your questions / views in the context of the relationship and the partnership's goal and objectives • Invite early responses – don't try and push the conversation too far too fast • Adjust your position and approach in light of the response you get – make sure it is a genuine conversation, not a monologue • Ask the person you are talking with to suggest ways of taking the conversation further and in what timeframe.
HANDLING GROUP CONVERSATIONS	It is a good idea to focus on forward-looking issues and to ask open questions that will encourage wide-ranging answers and positive contributions. These could include questions like: • What do you / we think are the most important elements of this partnership and how can they be protected / enhanced? • What are you / we most proud of in the partnership's achievements so far and how can these things inform our moving on decisions? • What kind of potential moving on options do you / we think there are and how can we explore each of these to arrive at the best one for all concerned? • How will our colleagues (in the different partner organisations) and other stakeholders understand / react to our moving on decisions and how can we check out their views? • Is there a need to make a decision? If so, is this 'non-negotiable'? Is there a specific deadline for the decision and its implementation and do we agree / accept this? • What more do we need to know to inform our decision(s)? How will we find these things out and share them with the group? • How will we take this conversation further? Who else may need to be consulted / involved? To keep the conversation lively, open-ended and constructive, it may be worthwhile to hold a workshop in which the partners – and other key stakeholders if necessary – can do some 'option mapping' or 'scenario planning' probably with a facilitator drawn from the group or brought in from outside the partnership specifically for the purpose.
NAVIGATING THE CONVERSATION	A moving on conversation can be planned or it can simply arise naturally. In either case, usually it is a topic that needs to be handled with care for a number of reasons: • Individuals may be reluctant to reveal too much about their wishes or plans, there may be a level of 'sitting on the fence' until the views of others are clearer • If the conversation has been planned and introduced by one partner, they will need to be careful not to force the pace or push their own view too strongly so as to avoid other partners feeling resentful…especially if the initiating partner is the one providing a substantial amount of resource • Some partners may be representing a 'non-negotiable' position on behalf of their organisation (eg a fixed deadline for needing to move on from the partnership) so it would be desirable for partners to know this early in order to avoid spending time debating something that cannot change • Some may feel isolated from the rest of the group because they have a very different

PROMPTS FOR A MOVING ON CONVERSATION continued

NAVIGATING THE CONVERSATION continued	perspective and this can begin to undermine an otherwise good working relationship so it is important to ensure every partner has an opportunity to present their situation or views. Others may feel that deals have been done behind the scenes and feel excluded • Several of the individuals involved may feel quite emotional about the moving on issue – having formed a real attachment to the other partners and / or to the project so it is important to acknowledge that moving on involves emotions as well as practicalities. Navigating moving on conversations requires as much tact and sensitivity as is needed in the early relationship-building phase of a partnership – perhaps even more. This includes being genuinely interested in the perspective of others, listening well to their ideas and concerns as well as being prepared to re-think your own views. Sometimes the conversation can be productive and rapidly reach conclusions that are satisfactory to all – though these will need checking out more thoroughly within each partner organisation. Sometimes the conversation may cause dissent and fragmentation – in which case it is advisable to agree to meet again at a later stage, perhaps allocating tasks (for example, further information gathering) or suggesting sub-conversations on a specific topic prior to the next meeting. Sometimes just with a bit of breathing space, some difficult issues will resolve themselves or partners will return to the table bringing with them some new solutions.
THE CONVERSATION ENVIRONMENT	If you are initiating an important conversation on this topic – at whatever stage in the partnering cycle and whether with an individual or a group of partners – it is important to choose a congenial environment and think carefully about the approach. Perhaps the first discussions need to take place over a meal or a drink, whilst taking a walk or during a project visit. Once the partners are ready to work out the moving on process, it is a good idea to locate a meeting place for this conversation away from day-to-day distractions. A setting which is peaceful and where those involved feel at ease in an informal atmosphere can make a real difference by providing an appropriate backdrop for reflection. The intention is to provide a sense of 'time out' and an opportunity to discuss views relatively objectively. In general terms, a space that is noisy, claustrophobic and / or cluttered will have an immediate impact on everyone – although some will be more conscious than others that this is the case. Little details demonstrating that care has been taken will set a good tone for the conversation's starting point. It may not seem obvious that rooms / environments have significant influence on conversations but they do. And a conversation about moving on may be a particularly sensitive one so you need all the help from the surrounding environment that you can muster!
RECORDING THE CONVERSATION	Finding a way to capture moving on decisions is important so that all the key players agree with what has been decided and feel that they have the clarity necessary to take the decisions back into their own organisations or to other stakeholders. This will help reduce the risk of several different versions of the moving on conversation causing confusion (at best) and relationship breakdown (at worst) either within or beyond the partnership.

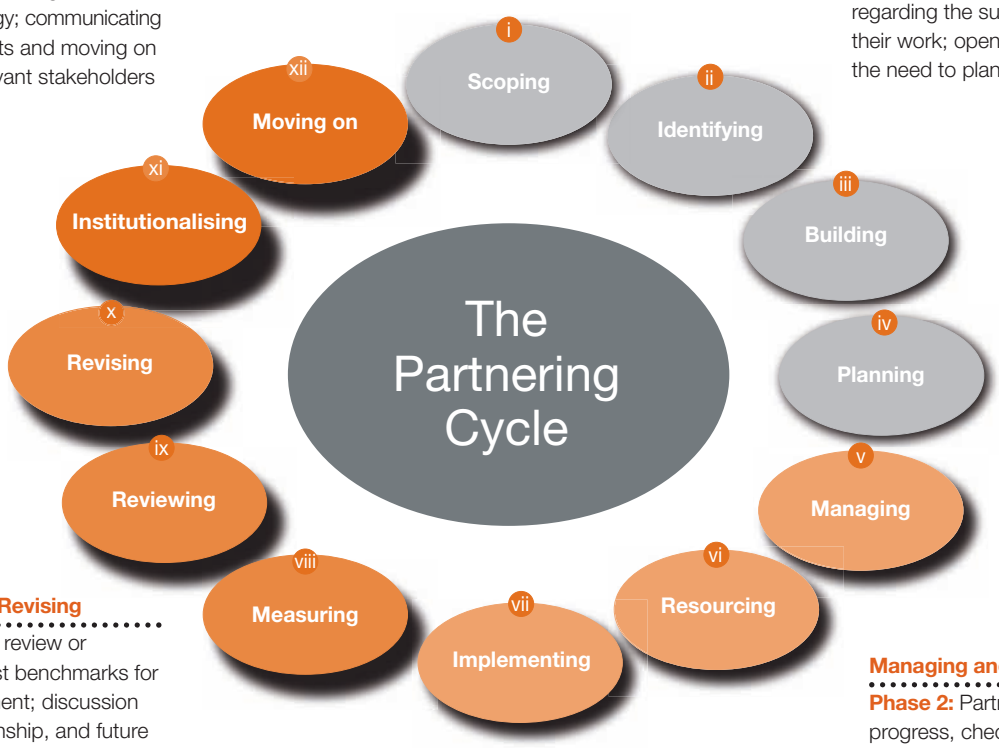
2

The Partnering Cycle

As moving on conversations are (usually) intricately linked to the issue of sustaining the outcomes of the partnership's activities, they can be held at any stage in the life of a partnership. The 12-step Partnering Cycle[2] can itself provide a simple but useful framework to consider sustainable outcomes (and, by default, moving on ideas) from the beginning. We can refer to the Partnering Cycle to see how moving on can be built into the partnering process from the outset and in each phase:

Scoping and Building
Phase 1: Partners discuss expectations for the future regarding the sustainability of their work; open recognition of the need to plan for moving on

Sustaining Outcomes
Phase 4: Implementing the moving on strategy; communicating partnership results and moving on decisions to relevant stakeholders



Reviewing and Revising
Phase 3: Formal review or evaluation against benchmarks for project achievement; discussion of partner relationship, and future options

Managing and Maintaining
Phase 2: Partners track progress, check the 'health' and expectations of the partnership, respond to changing context and informal discussions about the future

[2] This has been developed by The Partnering Initiative and is used as a basic schematic framework in many of our training programmes and publications. For more information about The Partnering Cycle, please see: www.ThePartneringInitiative.org

Phase 1: Scoping and building

The first phase in the Partnering Cycle provides an opportunity to identify appropriate partners; agree a vision and objectives for the collaboration; establish a good rapport; co-create ground rules for the partner relationship and begin to plan the activities to be undertaken and the resources required. But it is also an opportunity to set out expectations regarding the potential impacts of the partnership's work (and the indicators that will help partners identify those impacts), the sustainability of the hoped-for outcomes as well as the intended duration of the partnership.

This means establishing from the start an acceptance that the partnership will evolve and change during its life cycle and that at some stage partners and / or the partnership will move on. However, this must be done with sensitivity and with the purpose of fostering transparency.

There are advantages and disadvantages of bringing up the subject of moving on at this stage: on the one hand, the 'end' may be far enough in the future that it can be discussed in a non-threatening manner, on the other, partners may feel that it is inappropriate to think about the end before any work has truly begun.

As with most things, the manner of communicating is as important as the message itself: a 'light touch' at this stage would be sufficient, with recognition that partnering is an iterative process subject to internal and external influences. Partners may wish to have an agreement (perhaps recorded informally as a ground rule) to be transparent and establish a mechanism, such as a 'regular health check' about how they feel the partnership is progressing and how this may affect the future.

At this stage it is advisable to:

- **Dedicate enough time** to forming the partnership so that there is a strong foundation to the partner relationships
- **Build a common understanding** that all partnerships move on at some stage and that a range of options may be worth considering
- **Pay attention to each partner's cultural context** as the relationship is built over time, since this will be useful later when considering how to best manage moving on from different cultural perspectives
- **Explore the drivers** that might lead one or more partner to make a 'deal breaking' ultimatum
- **Discuss the concept of partnership as a temporary phenomenon** which is time-bound and oriented towards achieving sustainable outcomes
- **Establish an appropriate mechanism for accountability** that includes regular health checks and reviews that may help to identify choices or timetables for moving on in the future
- **Agree the partnership's objectives and milestones** to be able to measure progress towards the moving on point.

Phase 2: Managing and Maintaining

In this phase partners will shift their focus from building their working relationship to the development and delivery of projects. This means they will be dealing with the day-to-day demands and challenges in relation to managing and maintaining the partnership whilst also implementing activities.

Under the pressure to develop and deliver activities it is easy for partners to lose sight of the sustainability issue. Throughout this phase partners should consider conducting informal health checks at regular intervals to explore a range of issues to do with the partnership's management and effectiveness.[3]

In parallel with the on-going programmatic work, it is equally important to be exploring long-term options while building capacity and strategic relationships that carry the work forward longer-term. The kinds of questions partners are advised to consider during Phase 2 of the Partnering Cycle to address this include:

- Are there any potential capacity issues that will affect sustainability?
- Is the partnership addressing capacity-building activities necessary to achieve sustainability of the work beyond the life of the partnership?
- Are there others who could be involved in building capacity for sustainability who could work alongside (or even within) the partnership?

Phase 3: Reviewing and Revising

When the partnership's work has reached a more formal review and evaluation stage, partners typically focus on evaluating the **impacts** of their interventions. They typically focus less on the **sustainability** of their interventions. If partners seek to move on once their programme of work is complete / handed over, the issue of sustainability needs to be built in to evaluations and reviews of the partnership and its interventions.

Phase 3 also provides a useful opportunity to map out a number of Phase 4 scenarios (some of which are outlined below). This will help partners prepare both practically and psychologically for making the right moving on decisions and implementing them in Phase 4 when the time is right.

Any consideration of the 'what next?' question should involve consideration of:

- Ideas for the sustainability of the work and any related capacity issues
- The impact on all stakeholders of different moving on options
- How and when to communicate with and /or engage with different stakeholders (recipients, donors, partner organisations and others).

[3] See *Getting Better – Tools for Proving and Improving the Value of Cross-sector Partnerships for Sustainable Development* – published by The Partnering Initiative, April 2009

Phase 4: Sustaining Outcomes

We believe that there are at least seven possible reasons why partners may individually or collectively decide to move on in a partnership. These are summarised below:

Driver	Action by partners	Moving on characteristics
1 Reduction in or withdrawal of resources	Re-design the project and / or the partnership configuration	Partners move to a new mode of greater self-reliance as a partnership – for example, by becoming more efficient or new partners bringing different resources to the table
	Abandon the partnership	Partnership concluded – partners move on by leaving project or handing it over
2 Project(s) completed	Conclude / move on from the project and / or the partnership	Partnership wound down – partners publicise success and internalise / share lessons. Partners may or may not wish to continue to collaborate on something new
3 Project(s) continue(s) beyond the original timescale	Maintenance	Partnership continues – may require some adjustment (perhaps new partners)
	Hand over	Partners hand over to mainstream delivery system or create a new mechanism (transition or transformation)
4 Project(s) failed	Choice is leave or handover if there are some outcomes, others take over the activities	Partnership concluded – partners move on by reverting to 'business as usual'
5 Seeing new partnering potential	Begin a new partnering cycle	Partnership reviewed and renewed / renegotiated and takes on new activities – may also invite new partners
6 Changing partner priorities	Some or all partners move on and away	Partners separate and move in different directions or some of them may continue on with or without new partners depending on the work achieved to date and required in the future
7 Changing context – political, social, economic[4]	Adjust / terminate partnership	Partners review partnership and assess their actions in the light of the new scenario

Whichever reason prompts a change in action from the partners, what matters most is that the outcomes from the partnership be recognised (there can be achievements even in a 'failed' partnership) and supported through mechanisms for sustainability that have been put in place and function well.

No one knows at the start of a partnership how it is likely to evolve or end. Partnerships are by their nature fluid and complex, so partners should anticipate that any moving on discussions are likely to yield different opinions and suggestions throughout the life cycle of the partnership. **(See Tool 2 Checklist for 'sustaining outcomes' questions).**

If, as in the majority of cases, the focus of the partnership is on reaching a sustainable outcome, keeping this notion at the forefront of partnering conversations, plans and reviews will help to ensure that partners are prepared psychologically and in practical terms for when one or all of them moves on.

[4] See Tool 3 – Assessing the Situation – page 15

TOOL 2

CHECKLIST FOR 'SUSTAINING OUTCOMES' QUESTIONS DURING THE PARTNERING CYCLE

The purpose of this tool is to build commitment to and focus on sustainable outcomes as a main goal of any partnership.

PHASE 1 Scoping and Building

Activity	Sustaining outcomes questions
Scoping	What are the possibilities of creating programmes that will be sustainable medium to long term in this particular context? What will have to change in the enabling environment to ensure sustainability? Will a partnership approach help bring about such changes?
Identifying	How do each of the potential partners understand / interpret the concept of sustainability? Are the partners committed to a focus on activities that will lead to sustainable outcomes beyond the life of the proposed partnership? Are there potential partners who should not be involved because their commitment to sustainability is so poor?
Building	How can partners embed the principle of sustainable outcomes into the partnership and partner relationships? Are there examples of partnerships that have been successful in achieving sustainable outcomes that provide good learning? Can others who are believed to be crucial to sustaining outcomes be involved from the beginning and in what capacity (as advisory partners, observers, non-partner allies?)
Planning	Can sustainability be woven into all aspects of the outline plan? Can partners use the pre-agreement planning process to build commitment to sustainability? How can partners incorporate a capacity-building aspect to the partnership's activities where it is needed to ensure sustainability? How will partners recognise or measure sustainability?
Reaching agreement	How can partners enshrine the commitment of the partnership to sustainable outcomes?

PHASE 2 Managing and Maintaining

Activity	Sustaining outcomes questions
Structuring	How can the partnership be structured to promote greater local self-reliance and build capacity to sustain programmes medium to long term?
Mobilising	To what extent can the partnership's resources be drawn from local sources and / or how can the partnership develop other self-sufficient approaches as part of it's activities?
Delivering	How can the partnership best engage with / help to improve the local / mainstream systems to ensure long-term delivery and sustainability of outcomes?

2 TOOL 2

CHECKLIST FOR 'SUSTAINING OUTCOMES' QUESTIONS DURING THE PARTNERING CYCLE continued

PHASE 3 Reviewing and Revising

Activity	Sustaining outcomes questions
Measuring	To what degree are the partnership / project outcomes sustainable? And what are the indicators for this?
Reviewing	What needs to be built into the partnership's review procedures to ensure sustainability remains at the forefront of the partnership's work and the partners' priorities?
Revising	If there is slippage in meeting sustainability goals how will partners ensure time is spent revising the partnership's activities and ways of working to get back on track?

PHASE 4 Sustaining Outcomes

If the approach outlined above is followed, by the time the partnership gets to Phase 4 in the Partnering Cycle it will be a case of simply finalising measures to ensure the sustainability of activities. There are various scenarios for sustaining outcomes, including considering the establishment of a new freestanding organisation – but more commonly the partners will hand over the project to an organisation with the appropriate capacities to sustain it.

At this point we recommend looking at Tool 4: Handing Over Check List (page 20).

The partnership may wish to undertake a final piece of work to record the implementation of Phase 4. This can help provide a 'license' to move on for the partners. It also enables the partners to share their partnering experience with other practitioners so others can benefit from useful learning.[5]

[5] See *The Case Study Toolbook: Partnering Case Studies as Tools for Change* – this covers the issue of transferring partnering knowledge and experience as well as a consideration of what makes a 'learning organisation'.

3

Transitions and transformations

Cross-sector partnerships for sustainable development are typically designed to address, challenge or change an unsatisfactory economic, social or environmental situation. They are a highly collaborative, non-traditional approach to what may have been seen until that point as an intractable situation. It is the non-traditional or 'out of the box' approach that offers the possibility of something original and, hopefully, transformative.

A transformation has occurred when a situation is recognisably altered to become something new.

Partners who hope for and / or understand the transformative potential of their collaboration are likely to ask themselves the following kinds of questions:

- What is wrong and how can we turn the situation around?
- What would make a difference in helping us achieve the change that is needed?
- How will we know things have actually changed for the better?
- Do others see (whether within or beyond the partnership) that transformation is needed? If not, how will we convince them?
- In an ideal scenario, how would this situation look in 10 years time?

In our view, the potential of partnering to transform a situation is high – indeed, it is one of the factors that make a partnering approach attractive despite the evident challenges and transaction costs. In considering if / when / how to move on, partners could be encouraged to consider whether or not they have achieved the level of transformation needed or possible.

In addition to this, as we have discussed earlier, partnerships are, typically, voluntary arrangements taking on new collaborative approaches to challenges that have failed to be addressed successfully by single sector approaches. They are not new forms of permanent institutions operating independently of the mainstream[6] – though some partnerships can behave as if they are. Rather, they are more like forms of temporary or transitional communities.

If this is a useful and accurate perception, then managing a partnership is inevitably a process of managing change and transition – whether over a shorter (months) or longer (years) period. The tendency is for those involved to expect their partnerships to operate like conventional organisations with all the frustrations that arise when they patently fail to function as such.

[6] We are differentiating here between a partnership and a new mechanism formally registered as an organisation that may have been initiated by a partnership but is now operating as an independent entity.

It is possible that none of us working as partnership practitioners have, to date, invested anywhere near enough time in considering partnerships as 'transitional communities' with all the implications that has for greater: flexibility in management approaches, innovation in ways of working together and focus on accommodating behaviour.

It is possible that none of us working as partnership practitioners have, to date, invested anywhere near enough time in considering partnerships as 'transitional communities' with all the implications that has for greater: flexibility in management approaches, innovation in ways of working together and focus on accommodating behaviour.

This is an internal challenge to those involved in partnering and, perhaps, worthy of a more radical approach both from the organisations and the individuals when acting as partners.[7] Perhaps partnerships in general should be encouraged to think more about their transformational role – the potential for transformation being increased by the pressures of being temporary and transitional.

Apart from this, partnerships – however temporary in character – are faced with a further challenge.

Perhaps understandably, partners easily confuse a commitment to collaboration with an assumption about inclusiveness. But these two things are not synonymous. Partners sometimes behave as if their partnership operates in a vacuum with almost no reference to the wider operating environment. Where this is the case, the partnership is highly likely to fail. At its worst, a partnership can become – and can be perceived as – an exclusive 'club' with impenetrable boundaries where it is unresponsive to the context in which it is operating and insensitive to its potentially negative impacts on others outside the partnership.

Partners can easily confuse a commitment to collaboration with an assumption about inclusiveness. But these two things are not synonymous. Partners sometimes behave as if their partnership operates in a vacuum with almost no reference to the wider operating environment. Where this is the case, the partnership is highly likely to fail.

But the challenges of being 'transitional' and / or 'insular' are not the only issues here. Partnerships – however temporary – are also subject to a wide range of external influences. In addition to dealing with the internal challenges of temporariness, partners inevitably have to adjust their expectations and plans in response to the prevailing circumstances in which the partnership is operating.

A situation assessment is a good way to consider the global, national and local contexts alongside the specific – and possibly changing – circumstances of the partnership as a whole, the projects and the individual partner organisations **(see Tool 3 Assessing the situation).**

[7] This is explored in more detail in *Fit for Purpose: Building Organisational Capacity for Partnering* – published by The Partnering Initiative in May 2009.

TOOL 3

ASSESSING THE SITUATION

3

Context	Issues that may impact moving on decisions
THE GLOBAL / NATIONAL CONTEXT	• Political situation • Economic situation • Environmental conditions • Level of social stability in the wider operating context • Cultural issues / tensions / considerations • Other?
THE LOCAL CONTEXT	• Level of local engagement / appreciation / perception of need for the partnership • Willingness of others (individuals / organisations) to take over some (or all) of the partnership's functions • Stability of local relationships (ie do the key organisations work well together)? • Availability of effective local public sector systems to support the work beyond the life of the partnership? • Other?
WITHIN THE PARTNERSHIP PROJECT	• Project status (ie timetable for completion, transfer, expansion)? • Capacity of project staff and beneficiaries to carry on the work – either in the current structure or a new one? • Availability of resources / income-generation potential for outcomes to become sustainable • Potential for leadership / expansion / sustainability • Recognition from key stakeholders / influencers / policy makers? • Other?
WITHIN THE PARTNERSHIP	• Quality of the partner relationships • Efficiency of the partnership management processes • Level of continuing commitment of the partner organisations and / or key individuals (ie willing to give time and attention)? • Sustainability of the partnership for as long as it needs to function? • Availability of an alternative delivery mechanism provided by one or more of the partners or an external source, if desired? • Other?
WITHIN INDIVIDUAL PARTNER ORGANISATIONS	• Level of 'buy in' to the partnership? • Level of support from leadership / senior management? • Satisfaction with the partnership to date? • Continuing fit with current / changing organisational priorities? • Willingness to continue to invest resources? • Other?

Whilst partnerships are always impacted by the context in which they are operating, they can in turn have significant impact on those contexts. Some of the best partnerships actually articulate this as an additional goal of their partnering endeavours – actively seeking to influence organisations, systems and policies in ways that will ensure the sustainability of good outcomes.

Partnership – even many of those operating at very grass roots levels – are increasingly seeking not just to expand their **activities** but also to expand their **influence**.

This is perhaps best illustrated by understanding the potential of any partnership to operate at three levels:[8]

Level 1	**Providing…** **…practical solutions to development challenges**	Most partnerships operate at this level – co-creating, developing and delivering collaborative projects
Level 2	**Influencing…** **…individuals, organisations and systems**	However, all 'level 1' partnerships – when they work well – will inevitably begin to impact and influence more widely and deeply
Level 3	**Changing…** **…policy and practice**	In due course, even the smallest partnership can provide the stimulus and inspiration that leads to a significant change in the 'rules' by impacting policy, legislation and scale

[8] This is adapted from a presentation made by Simon Zadek – a pioneer of partnerships for sustainable development – at the Post-graduate Certificate in Cross-sector Partnership, University of Cambridge, in 2004 (See: www.accountability.org)

4

Managing the moving on process

A partnership, as we have suggested above, is a voluntary collective activity. In that sense, moving on should be seen as inevitable. But this does not mean that it is easy to move on. Partnering arrangements can easily take on a life of their own and it is not unusual for partners to prefer to keep a partnership in tact and unchanged rather than to address the moving on issue.

This may be due to genuine attachment to the:

- partnership's work and fears for the future if the partnership changes
- partnering experience – individuals enjoying operating differently and away from their more conventional day-to-day work
- partners as individuals with whom a strong working relationship and mutual respect has been established.

If this level of attachment is seen as a good thing, partners may simply decide to continue to collaborate by restructuring the way in which they work together and / or to re-focusing the nature of their work together.

This is a case of moving on without moving away.

In such circumstances, it may be a good idea for partners to return to the first phase of the Partnering Cycle (see page 7) to re-scope and re-plan the partnership and its future activities. This should be a quicker process since, by this stage, there will be established working relationships and a track record of working together.

Some key questions to be asked when re-negotiating are:

- What is the new focus? What are the new partnership objectives?
- Do the operational / management arrangements need to be changed?
- What are the new resource requirements? How will they be identified / agreed / secured?
- What are the new performance indicators, benchmarks and review processes?
- Will any / all of the current partners be involved and, if so, in what way(s)?

Example case

A successfully re-negotiated partnership

A multi-national corporate and an international NGO agreed to partner on a social development project. The partnership was based on the company giving donations of much-needed products for immediate distribution and use within the NGO's constituencies in poor rural communities. It quickly became clear during early implementation of the project, that the products were not as suitable or as welcome as had been envisaged. The NGO chose not to communicate this to the company as they valued the relationship for quite different reasons (mainly as a model for engaging and mobilising other corporate resources) so did not want to jeopardise the partner relationship.

At a slightly later stage, the corporate conducted an internal review of its CSR activities and decided that the partnership was not adequately in line with its own business priorities. When they made this known to the NGO, both parties were surprised to discover how very different their perceptions of the purpose and value of the partnership were.

The change proposed by the company generated initial resistance within the NGO – particularly as it would involve some re-negotiating of the partnership. To avoid deterioration of the relationship, the company suggested they should hold an off-site meeting (in a neutral environment) with a facilitator (internal to one of the organisations but accepted by both). All the key players participated in a 'let's talk and understand each other' conversation and they also participated in a 'blue skies' thinking exercise.

The company was careful not to dominate the proceedings. The NGO decided to be honest about the fact that the products donated had not been appropriate. Ideas were exchanged on the definition and development of roles and responsibilities. The initial agreement (including the partnership's goals, decision-making procedures and communications) was reviewed. A number of new decisions were made that formed the basis of a new partnering agreement and the partnership moved on with a new focus and clear, shared goals.

This approach – to create space or 'time out' – was highly successful. It offered the opportunity to both parties to share views and to jointly explore other options as a partnership – rather than unilateral decisions being made separately.

If more attention had been given to the partnership-building phase, much time could have been saved and the risk of the partnership failing would have been significantly reduced. However, the lesson here is that it is never too late to consider a radical new approach and to re-establish a useful partnership capable of delivering sustainable development outcomes on a stronger foundation.

Over the course of the Partnering Cycle, there will invariably be changes in the nature of the partner relationships and partners will need to adjust their thinking and behaviour in the light of such changes. In the following case study the remarkable thing to note is that although the key donor / partner relationship changed three times in a comparatively short space of time, both the donor and the partners learnt how to adapt their expectations as the basis of the relationship changed.

Example case

A changing partner relationship

A corporate foundation established a flagship partnership programme bringing together three NGOs and decided to encourage them to work together as a partnership to maximise the funding being offered. The foundation – as the partnership's main donor – took a lead role in building the partnership between the three NGOs that had until then been competitors for the foundation's available grants.

After initial reluctance the three NGOs began to enjoy working together and to value the diversity of approaches and the complementary nature of the way they worked on similar social issues. At this stage the foundation became an informal partner and participated at the partnership meetings, co-creating projects and programmes on an equal basis with the NGOs. This worked remarkably well and the foundation itself was increasingly seen as a pioneer in its approach to supporting social development partnerships.

In the third phase, as the partnership approached the moving on stage, the foundation reverted to being a funder by launching a new call for proposals for the next flagship programme. This time it decided to make a larger donation to a ready-formed partnership. There was a danger that the current partners, wishing to re-apply for flagship status, would revert to a competitive relationship but this was avoided due to solid and transparent relationships. Furthermore, the foundation decided to offer an additional year of funding specifically for developing and implementing their moving on strategies with a focus on sustainability of their work.

At the end of the year the partnership was concluded but the relationships remained in tact as each entity moved on to new activities and new partnerships.

As we have noted elsewhere, the most successful and productive partnerships are those that do not resist change by trying to contain the partnership in a fixed format but rather accept, manage and even thrive on change as a key element in their partnering approach.

Many partnerships will hand over their programmes of work to a mainstream delivery mechanism – often, but not always, to an improved public sector institution or agency. A system of structured early contact and dialogue with the selected institution or agency is important to ensure that they are prepared for such a handover in terms of capacity, resources and commitment.

In other situations, partners agree that one of the partner organisations should simply continue to operate the programmes as an expanded part of its mainstream activities. This can work well, since the organisation will obviously know the programme well and will, presumably, be able to move into the new role fairly seamlessly.

A further option – and one that is becoming more common – is to create a new entity or organisation that will be purpose-built to deliver the programme of work indefinitely – inspired, but no longer controlled by, the original partnership.[9]

When planning the chosen moving on option – whichever it is – it may be useful to create a checklist of factors that will ensure a smooth and trouble-free implementation. Such factors include:

- Differences in the cultures of the partner organisations around change or termination
- Potential impact of the moving on strategy on all stakeholders
- Sustainability issues associated with the programme – especially if the moving on strategy reduces the resources previously available from partners
- Any implications for – or impact on – the local economic and social environment in which the partnership has operated
- An agreed external relations position – partnerships can be damaged retrospectively by poorly handled or poorly communicated moving on strategies.

Whatever arrangement partners may put in place, the handing over process will need to be managed sensitively and systematically **(See Tool 4 Ground rules for handing over successfully)**.

[9] This is explained in outline in *The Partnering Toolbook* and more fully in *Fit for Purpose*

4

TOOL 4

TIPS FOR HANDING OVER SUCCESSFULLY

It can be easy to manage moving on strategies clumsily. Most practitioners have far more experience with starting and managing partnerships than with transitioning or closing them.

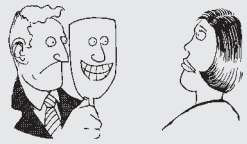
Some useful tips include:

BE INCLUSIVE	• Involve as many key stakeholders in the process as possible • Engage support of senior management (of the partner organisations and those to whom the work is being handed over) • Share responsibility for managing the hand over process as widely with partners as possible • Allow people to express emotions (including anger) – it is usually an indication of the fact that they really care about what is happening
BE TRANSPARENT	• Discuss the handing over process openly and avoid 'secret' conversations • Remember to record the moving on decisions and the handover process • Be honest about difficulties or bad news – don't bury it and hope it will go away!
BE CLEAR	• Clarify what is happening to those who need to know • Be sure that partners are handing over based on accurate and verifiable information – not simply on impressions or feelings • Articulate and address any risks involved in the handover process
BE PATIENT	• Allow enough time for the moving on process – if you rush, important things may be neglected • Expect that some partners will take more time than others – don't expect everyone to adopt the proposed changes at the same pace • Don't make decisions in the heat of the moment – they will invariably be bad decisions! • Take 'time-out' with those involved to explore views and manage conflicts if necessary
Last but not least… BE A GOOD ROLE MODEL	• Behave considerately in all your dealings with partners and those you are handing over to • Be diligent about completing all your handover tasks and responsibilities • Be prepared to let go of something you care about when the time comes.

There are inevitably risks associated with the moving on stage in a partnership. Indeed, it is not uncommon for what were previously good partner relationships to unravel at this stage as partners revert to their primary organisational or personal priorities. Ideally the partnership will have an established commitment to a number of principles and / or behaviour ground rules and these should be invoked and adhered to during this time.

Whilst there are limitless models / types of partnership, there are core principles that can be regarded as universal for any good partnership of whatever type and in any cultural context.

The key principles promoted by IBLF / The Partnering Initiative[10] and applied in many partnerships over the past 15 years are 'equity', 'transparency' and 'mutual benefit'. We see no reason that these should not be used to underpin the 'moving on' process as outlined below:

Core partnering principles	Why this is so important	How to maintain during the moving on phase
	Equity – where each partner contributes to the whole and their contribution is properly valued – is essential to building respect for the priorities of each of the partner organisations	• Continue to consult and include all partners in moving on discussions • Ensure that all perspectives are invited and heard; arrive at decisions by consensus • Keep checking that those who are silent are in agreement with what is happening
	**Transparency** – where partners behave openly and honestly with each other with no 'hidden agendas' – is essential to building trust between the partners to support the day-to-day working relationship	• Determine what kind of discussions are required and when. 1-2-1 conversations may not be acceptable as others may feel excluded • Decide how much can be shared with other stakeholders during the moving on discussions • Agree what should properly remain confidential
	Mutual benefit – where it is accepted that each partner organisation has the right to gain value from the partnership – is essential to ensuring the partnership's own sustainability as long as it is needed	• Keep the focus on the partnership's achievements and the benefits enjoyed by the different partners so far • Consider how moving on decisions will add further benefits • Be generous in acknowledging all roles and contributions to the partnership

These principles may seem obvious but they are easily overlooked – especially when partners begin to take each other for granted and relegate to second place relationship management over the partnership's project(s) or their individual organisational priorities.

[10] See: *The Partnering Toolbook*, page 6

Example case

Partnering principles being ignored

A major national telecommunications company worked in partnership with a national NGO to set up a 24-hour telephone counselling service (Help Line) for vulnerable young people. The project grew over 10 years and became a highly regarded and well-used national service.

From the start of the partnership, the company indicated that it would commit to a 5-year investment and engagement. After 5 years it took on a further 5-year commitment but made it clear that this would need to be phased out during the last 2 years. Towards the end of the ten-year period, the company representative tried repeatedly to discuss and agree the moving on terms, handing over its role and even offering to help secure another corporate partner to take over the resource commitment and engagement.

In spite of the company being entirely transparent about its intentions throughout the life of the partnership, there was a media storm against it orchestrated by the NGO. The NGO also lobbied national government very hard to persuade ministers to intervene to force the company to remain as a partner. The story was presented as if the company was simply neglecting its social responsibilities and no attempt was made to present the company's perspective, including its strategic decision to move into new forms of social investment that would have even greater social impacts than the Help Line.

The company was pushed into a corner. It received an avalanche of bad publicity – virtually demolishing its reputation for the achievements in the partnership over 10 years. It refused to be bullied into remaining a partner and in any case felt that it would now be unable to work constructively with the NGO. This created a huge rupture between the partners and significantly damaged the NGO's own reputation and future partnership potential. By the end of a further three-year period, the NGO had failed to secure any other corporate partners – it was, in effect, blacklisted by other companies for having behaved so poorly.

Most importantly of all, the Help Line was forced to close.

When only one partner organisation moves on from the partnership – for whatever reason – the remaining partners will need to assess the impact on the partnership and its project(s). They will need to agree whether or not to seek a new partner organisation or simply to review and adjust the partnership to function with a smaller number of partners.

Post-departure scenarios are times of change and invariably generate some sense of loss (even when the departure is entirely positive and welcome). But a departure also always leaves an open space for something or someone new to arrive.

Even where partners have discussed a moving on strategy throughout the Partnering Cycle and it seems that the notion is well accepted by the partners, there will inevitably be mixed feelings and some challenging moments during its implementation.

It is common at this stage for partner organisations to suddenly revert to a much more unilateral and 'positional' viewpoint. It is also quite common for partners to exhibit some really poor partnering behaviour quite unexpectedly and, apparently, out of character – for example seeking to secure allies with one or other partner and moving away from the previous transparent and open way of working with the partner group as a whole.

Such behaviour can come as a shock and partners may feel that the situation could benefit from some additional professional support to help them navigate through any stormy waters successfully. Where partnerships already have a designated 'broker' or relationship manager in post (either drawn from one of the partner organisations or an external appointment), it will be natural for that individual to help manage the moving on process.[11]

When a partnership is unable to manage the moving on process on its own and there is no obvious person to step into a brokering role, partners may wish to appoint an external facilitator to help. In this scenario, it is very important that all partners agree on:

- the need for a facilitator
- the parameters of their proposed role
- how the facilitator will be funded
- how the facilitator will be briefed and by whom
- how much background knowledge they need to have.

[11] The role of the partnership broker is fully described in *The Brokering Guidebook* and includes a section on how a broker can assist partners in managing moving on strategies as well as any exits and entries that occur during the life of the partnership.

Whatever the drivers for implementing a moving on process, it is important to record the positive things that have happened, to give credit where it is due and to celebrate achievements (in the case of a failed partnership, even where these achievements may be quite small). Everyone will be glad to feel their own and their organisation's efforts and contributions have been appreciated.

In any case, it may not be entirely clear until sometime later whether the partnership has had unrecorded or lateral benefits. Partners should try to avoid being too quick to judge the partnership and its achievements or disappointments. It is not always obvious who has contributed most and who least. Nor is it always obvious what qualifies as a 'success' and what constitutes a 'failure'...

Example case

Perceptions of success or failure…

Set up as a voluntary collaboration between businesses, the local government, local NGOs and the university, a City Development Forum coordinated and promoted a number of highly successful partnership-based initiatives addressing a range of inner-city challenges. Over a five-year period and with some 90 individual and organisational members, there were a number of self-managing programmes established to: clean up the city, build a green tourism infrastructure, build a stronger culture of entrepreneurship and opportunities for inward investment and to renew the city's cultural heritage.

During the five years, as these programmes of work were successfully completed, the character of the city visibly changed and its environmental status, prosperity and social stability markedly increased. Furthermore, under the influence of the partnership, the city council slowly began to offer similar support functions to those that had been offered by the Forum.

It became increasingly clear that the Forum had in some sense completed its task. Since the organisations had some emotional attachment to the Forum and it was a structure based on collaborative leadership, no-one seemed to be willing to raise the issue of whether or not the Forum should be closed down.

In the event, Forum members simply stopped coming to meetings and the energy for the Forum as an entity dissipated until there was little left in place. The impact of this un-managed closure was that despite its many notable achievements, it is now remembered as an organisation that failed rather than a temporary partnership that succeeded in achieving highly significant outcomes and goals.

Whatever the reasons or circumstances for moving on, and whatever the nature of the partner relationships, it will be important for everyone to have a sense of satisfactory 'closure' of that phase of the relationship or of the partnership as a whole. It will also be important to communicate well with all those who have the right or the need to know what is happening and why. **(See: Tool 5 Moving on – communication guidelines)**.

5

TOOL 5

'MOVING ON' – EXTERNAL COMMUNICATION GUIDELINES[12]

COMMUNICATING BEYOND THE PARTNERSHIP

Who outside the partnership needs to know what?

Who?	What?
Project staff and beneficiaries	
External donors	
Other external supporters	
Partner's own networks	
Policy makers or government officials	
Wider public	
Other?	

Who is the best person / partner to do the communication?

This is an important issue. Communication responsibilities should ideally be shared between the partners as appropriate. In allocating specific communications tasks, an assessment should be made about whether the selected individual:

- will be perceived as speaking on behalf of the partnership (as opposed to their own partner organisation)
- will be able to give the time and attention the task needs
- has the pre-requisite communication skills to transmit the information effectively

What communication options are there?

Of course there are many communication options available. The important thing is to match the option as well as possible to the communication preferences and needs of the target audience. External donors may want a report of activities and impacts; local communities may prefer a site visit and a story – or these requirements may be the exact opposite! Check out what is wanted before making too many assumptions and always err on a preference for the face-to-face and personal rather than the written and impersonal.

Partnering is a thoroughly human activity based on relationships and conversations, communicating about it should preferably have the same characteristics. What most people want is something genuine rather than slick.

What should a good communications strategy ensure?

We believe a detailed communications strategy should be built into the partnership from the beginning – enshrined in the initial Partnering Agreement and refined throughout the partnership's life cycle. Issues to consider include:

- Agreement on what should be in the public domain and at what stage
- Respect that some partners need some information to remain confidential
- Awareness of who might need or want to know what, and why
- Understanding the value to the partnership and / or the projects of communicating to the right people well
- Recognition that not communicating is also a form of communication – it is likely to be interpreted as the partnership lacking transparency or being exclusive

Is there a wider audience for the lessons from your partnership?

All moving on situations provide fertile ground for learning: partners will have invested time and resources into the partnership and their experience (good or bad) will be valuable for others. Apart from media coverage (which may have a wide reach but tends to be superficial) partners may decide to commission a 'learning case study'[13] of the process or publish a well-written and illustrated story of the partnership and its activities. Such pieces can be appreciated by the partner organisations and other stakeholders as well as providing inspiration for others undertaking partnership work.[14]

[12] See *Talking the Walk – A Communications Manual for Partnership Practitioners*, 2008
[13] ibid
[14] See *The Case Study Toolbook*, 2007

Communications[15] during the moving on process are particularly important – both for internal good management and external reputation reasons. Partners are well advised to take all forms of communication especially seriously at this point in their partnership.

Moving on communication tips for partners

During the moving on process, good communication practices by partners should ensure the following elements:

- **Open questions, active listening and dynamic conversations**
- **Record keeping (written, oral and visual)**
- **Information-sharing (written and verbal)**
- **Anxiety management (as per any change process)**
- **Acknowledgement and celebration (of achievements, effort and contributions)**

It may be worth nominating an individual to act as the facilitator / partnership broker with specific communication responsibilities since others may be too busy planning their own moving on strategies to be able to give adequate attention to the wider communication challenges.

Moving on communication tips for a facilitator or partnership broker

If someone has been asked to facilitate the moving on process, it is important that he or she:

- **Persuades partners to agree and implement an external communications strategy**
- **Helps partners be constructive and communicate well throughout the process**
- **Is transparent in their own behaviour and encourages transparency between partners**
- **Captures and shares knowledge from the partnership appropriately**
- **Assists partners in identifying and celebrating the partnership's achievements**
- **Spends time debriefing with partners and other stakeholders**

Our conclusions from our work in preparing this publication are that moving on is not necessarily straight forward. Making the right decision is challenging, and implementing that decision – whatever it is – can be equally challenging.

We come back to where we started – implementing a moving on strategy should be done with as much (possibly even more) care as putting in place the building blocks in the creation of a new partnership.

We hope this toolbook has raised lots of questions and suggested answers for at least some.

Partnering is a new 'science' – let's use our partnerships as genuine experiments and see how we can test things out and learn from what has happened (good and bad) in order to do (even) better next time.

Partnering is also a new 'art' – let's make sure we illustrate and celebrate the opportunities and benefits that the partnership has brought us, as well as other partners.

By sharing our learning, celebrating our partnering achievements and moving on creatively and constructively we are all playing our part in building effective collaboration for a more sustainable future.

[15] Please see: *Talking the Walk; A Communication Manual for Partnership Practitioners* for a very full exploration of the vital importance of communication in a partnership and advice on how to plan and deliver an effective communication strategy.

Further resources

The Partnering Toolbook, IBLF 2007. Available from www.ThePartneringInitiative.org

Talking the Walk, IBLF 2008. Available from www.ThePartneringInitiative.org

Case Study Toolbook, IBLF 2006. Available from www.ThePartneringInitiative.org

Why and when to end a community-business partnership www.ourcommunity.com.au

Learning to let go: Making better exit decisions, John T Horn, Da P Lovallo and S Patrick Viguerie in The McKinsey Quarterly 2006 No. 2

Succession Planning: Toolkit for Execution
http://www.researchandmarkets.com/product/18c172/succession_planning_toolkit_for_execution

Supporting the Capacity of Organisations at Community Level: An Exploration of Issues, Methods and Principles for Good Practice, Author: Katie Wright-Revolledo Series: Occasional Papers Series ISBN: 1-905240-05-8 Publication date: 08/01/2006 Publisher: INTRAC
http://www.intrac.org/publications.php?action=edit&id=102

EQUAL Guide for Development Partnerships, European Communities, 2005
http://europa.eu.int/comm/equal

For moving on as a partnership broker

Brokering Guidebook, IBLF 2005. Available from www.ThePartneringInitiative.org

Managing Transitions: An experiential learning approach to handing over the partnership brokering role (Amanda Gardiner, PBAS final project 2007) available on www.partnershipbrokers.org

For moving on as a foundation or donor agency

Exit strategies: transitioning from International to Local NGO Leadership, PACT, April 1997 ISBN 1-888753-08-0

The vexed question of exit, Nilda Bullain in Alliance Vol 9 June 2004

Twelve commandments for exiting foundations, Andrei Kortunov in Alliance Vol 9 June 2004

Negotiating goodbye while saying hello, Alan Fowler and Joe McMahon in Alliance Vol 9 June 2004

Acknowledgements

As readers of our earlier publications in our Tool Book series will know, The Partnering Initiative always seeks to build knowledge about partnering from participative research with a range of organisations and practitioners. We see our role as synthesising information and experience in order to be able to disseminate it as widely as possible to practitioners everywhere.

This publication is no exception.

Vodafone UK Foundation's Sarah Shillito not only provided funding to cover the costs of publication but also, more importantly, offered us the opportunity to study the issue of moving on with reference to their own partnership projects. This has provided the best possible learning opportunity and we hope we have been able to add value to their partnerships in the process.

We have also been able to draw on the original work of many other partnership practitioners from diverse sectors and cultural contexts, many of whom have completed one of the partnership courses that The Partnering Initiative has developed in collaboration with other organisations.[16] Their stories, case studies, log books and written papers – building from what is often cutting edge practice in critical situations – are inspirational as well as practical. We are grateful to them (too many to name individually) for their generosity in sharing their ideas, experiences and views with us so we could share them with others.

This publication has also benefited from some of the early desk research and case study analysis undertaken on our behalf by three students from the London School of Economics as part of their post-graduate studies in 2007.

Last but not least, we are fortunate that our small staff team at The Partnering Initiative works with a growing number of international associates – independent partnership advisors, brokers and trainers. Without exception, they are as passionate about cross-sector partnering as a sustainable development mechanism as we are and their willingness to offer constructive critique to this project has been completely invaluable.

[16] The Partnership Forum is an online forum to support practitioners in their professional development and their efforts to build and run effective cross-sector partnerships for sustainable development. The Forum will also facilitate a collective voice for partnership practitioners and the partnership movement generally. www.partnershipforum.org

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www.ThePartneringInitiative.org