



Tools and Templates

WWF RELATIONSHIPS AUDIT TOOL

An assessment tool from WWF's Programme Standards for periodically reviewing key relationships and considering how they could be improved.

Source: Casturo, C. and E. Swanson. (2007). *Step 3.4 Partnerships and Partnership Management*. Resources for Implementing the WWF Project & Programme Standards. WWF. Accessed October 20, 2010 from http://assets.panda.org/downloads/3_4_partner_management_may_20_2007.pdf

Annex B. Relationships Audit Tool

To maintain strong relationships with partners and other stakeholders, it can be helpful to periodically review or “audit” some of your key relationships and consider how they could be improved.

A simple “Relationships Audit” tool that can help you do this is provided below (adapted from a Relationships Foundation audit tool). Basic instructions follow:

- 1) Preferably complete the audit in discussion with your counterpart (e.g. partner, project team member, other stakeholder). All parties need to be willing to give and receive feedback for this to be possible.
- 2) Where possible fill in two scores, one for you scoring the counterpart, the other for the counterpart scoring you.
- 3) As well as giving scores, comment on the reasons for scoring high or low. This can accompany the audit tool as explanatory text.
- 4) Examine the scores and consider why scores may be low and what important messages come out of the assessment. Try to share views openly with each other (verbally and/or in written comments).
- 5) Consider what action you will take:
 - How can you keep the high scores high?
 - How can you improve on the low scores?
 - What priority actions will you take as a result?

Relationships Audit		1	2	3	4	5	6	
A	Access and responsiveness - Access to my counterpart is difficult and getting a response is difficult even when they are in							The lines of contact are open and work quickly. I can rely on getting a quick response when needed.
B	Mutual Understanding - We only have a superficial understanding of each others' objectives, what each other does, how they work, the issues they face, and how these may affect our work together.							We have discussed how our work together fits in with each others' objectives and understand the challenges each of us faces.
C	Parity and participation - I have little influence in the relationship. I am rarely consulted before key decisions are made, and input I give appears to be ignored.							I have the opportunity to contribute to my counterpart's decision-making processes when this will affect me. My input is received and valued.
D	Delivering the basics – My counterpart does not deliver on time on the basic process requirements of the contract/ relationship							My counterpart delivers on time on the key requirements of the contract/ relationship
E	Technical Support and Learning - My counterpart has provided little useful technical support (to help build skills and/ or knowledge). We do not learn from each other or share lessons.							My counterpart has provided an important technical support in line with our needs. We are willing to learn from each other and share lessons.
Overall rating (sum of scores/5)								