

# **UNGP Guidance note: Deciding ‘to partner or not to partner’**

## **Table of Content:**

[Intro](#)

[Background](#)

[Process](#)

- [Step 1: Identify a core partnership group](#)
- [Step 2: First partnership assessment](#)
- [Step 3: Preparation and Submission of concept note and partnership prioritization](#)
- [Step 4: Steering Committee meeting and decision making](#)

## **Intro**

Your organization likely has its own process for reviewing and approving its portfolio. This document provides an *example* of such a process which UNGP has experimented with. You are welcome to review and use it as you see fit.

It aims to provide guidance on making clear, effective and informed decisions about whether or not and on what basis to proceed with new partnerships. Ultimately, this guidance aims to ensure predictability in the decision-making process over partnerships for the benefit of both internal and external stakeholders.

The guidance note is for those functions at UNGP that have a responsibility to ensure partnerships align with UNGP Strategy and that UNGP resources are applied to transparently prioritized collaboration.

At UNGP the Leadership Team, the specialized Partnerships Team and Partnership Leads (those who lead partnerships in the organization which can be anyone including the partnerships team itself)- all have a role to play.

When it comes to deciding on new projects: This guidance note should complement other existing organizational processes, project cycles and innovation cycles.

## ***UNGP- steps to deciding to partner or not***

**1**

### ***Identification of core group***

Partnership Lead identifies core group

Partnership Team is always part of the core group

Member of the Leadership Team may not always be present but at least one is identified as champion of a specific partnership

**2**

### ***First partnership assessment***

Core group decides on recommendations to Steering Committee

Assessment criteria: strategic alignment, risk level, additionality and internal readiness, return on investment, sustainability scalability and impact

**3**

### ***Submission of concept note & partnership prioritisation***

Partnership Lead prepares concept note

Partnership Lead submits concept note to Partnership Team 1 week prior to Steering Committee's meeting

Partnership Team makes recommendation on level of priority for the partnership

**4**

### ***Decision-making by Steering Committee***

Partnership Team submits concept notes to Steering Committee 3 days before review date

Partnership Team facilitates Steering Committee's meeting

Partnership Lead is invited to present concept note and address questions from Steering Committee

## **Background**

UNGP is a globally distributed network, with an evolving set of global programmes, and an operating model of working deeply in partnership through multi-disciplinary, project-based teams. Given that every partnership is unique, UNGPs approach to making such decisions needs to be flexible and adaptive, ensuring the relevant people are involved, that UNGP is able to move quickly and responsively, and that decisions are guided by consistent criteria.

**In this document the Partnership Steering Committee is referred to as UNGP's decision making body, you will have your own for your organization and can adapt the process.**

***When does this process apply?*** You may not need to use such a detailed decision making process for every decision or partnership. At UNGP we have tested this process with Partnerships involving at least one of the following:

1. More than one UNGP office involved or otherwise of general interest to the UNGP network.
2. Contributions from partners of over 50,000 USD (regardless if in cash or in kind).
3. High visibility, for example involving a high profile organization, creating both risk and opportunity for UNGP
4. Medium-high risk.

***How are projects considered in this process of approving partnerships?*** Partnerships are often the precursor to (and vehicle for) the development of projects; however, at times the project is conceived or even commenced before the partnership is developed, recognised or formalized. Either of these scenarios still require endorsement and prioritization of the partnership itself. Project concepts can be reviewed as an integrated part of the partnership approval process before proceeding with the project.

## **Process**

The **goal** of this process is to establish internal alignment about a partnership opportunity, and to make a clear decision as to whether to embark on the partnership, to guide the relevant Partnership Lead on a course of action.

### **Step 1: Identify a core partnership group**

The Partnership Lead (ie, someone who is accountable for the relationship development regardless if proactively or reactively) takes the lead in determining the key in-house stakeholders, who will be part of the core team and as such be involved in the initial assessment of a partnership. For UNGP, these are colleagues that may contribute to a partnership based on their technical expertise, may be responsible for the geographic or thematic area related to a partnership or could otherwise support the execution of a partnership.

At this initial stage of assessment, the Leadership Team should not be involved as a group but it is recommended that a specific member of the Leadership Team should be always associated as a *champion* of a specific partnership.

If your organization has a specialized partnerships team- it should be regarded as part of the core group.

Core group- are we involving the right people?

This is a step often ignored, where people jump directly into making the decision (as to whether to partner or not) without consideration of whether the right people are involved in the decision, leading to a situation where ill-advised partnerships may be pursued based on incomplete information, placing pressure on resources, yielding little value and creating unnecessary risk.

Step 2: First partnership assessment

The Partnership Lead convenes the core group to discuss the selection criteria for a partnership. At this stage a partnership concept note may not have been developed but some background work on the partnership should have already been conducted by the Partnership Lead in order to ensure an informed discussion with the core group.

If your organization has a specialized partnerships team they may be available to facilitate the process of initial assessment, thus leaving the Partnership Lead to focus on content about the partnership.

Process of initial assessment:

- A. The Partnership Lead presents the group with key information/synopsis to build shared understanding within each of these parameters. This may include background on the relevant partner organizations and discussions so far, early ideas of the nature of the partnership and potential shared interests/contributions/activities, wider UNGP team considerations (e.g. similar/duplicative/conflicting partnerships; resources available/constraints), development of reasons for/against the opportunity.
- B. The Partnerships Team facilitates the group discussion and exchange of perspectives, using different methods and tools to support hearing diverse perspectives, transparent scoring against criteria, determining the level of alignment amongst the group on the way forward, co-creating recommendations.
- C. The group outlines the agreed proposal to be put to the Partnership Steering Committee.
- D. The Partnership Lead documents the outcome of the decision by integrating considerations in an internal concept note (see UNGP's concept note template for inspiration), embarks upon the recommended plan and prepares a fully-fledged concept note for submission to the Partnership Steering Committee.

### ***Group process for scoring and consent-based decision making***

An example of a scoring and proposal development process:

- Upon the presentation of the key information about the partnership, the core group members each individually score the decision parameters, by allocating a score (from 1-7, where 1 = least desirable end of scale, eg highest risk, lowest value, lowest readiness, lowest strategic alignment. Note: Scoring risk is about 'Acceptable degree of risk' so that 7 will be a favourable score, i.e. the risk is low/acceptable.)
- Scores for each parameter are averaged to show the variance across the parameters.
- Once scoring is complete, the group members take some time to reflect on the information, discussion, and the scoring and offer their individual proposal of a way forward/decision recommendation. The group listens to/reviews each individual proposal and looks for what is emerging with sufficient alignment across the group.
- The group then practices a consent-based<sup>1</sup> approach to decision making to co-create a recommendation for approval by the Partnership Steering Committee. This type of decision making has a distinct difference from consensus where we ask everyone 'do you agree?'. Here instead, we ask 'do you object?' which gives us much more room to move, and more likelihood of reaching a decision.

### ***Is it a yes or no?***

The desired outcome is multifaceted guidance on how to proceed in engaging with the partner about the new opportunity, in the interests of positioning UNGP as a responsive, transparent partner, seeking strategic and mutual-value partnerships. It may not always be a certain yes/no, rather it may involve further questions to the partner, exploration of options that would be perceived as valuable to UNGP or circumstances where UNGP would not wish to proceed, and clarity on the nature of resources / contributions UNGP is able/unable to make available for the partnership.

### **Step 3: Prepare and submit concept note and partnership prioritization to your decision making body**

In this stage the internal concept note prepared by your partnership lead will be submitted to your decision making body in your organization. If you have a specialized partnership team, they can help recommend the level of priority of the partnership- given they will have an overview of the entire partnership portfolio.

### **Step 4: Steering Committee meeting and decision making**

The Partnership Steering Committee referred to is a decision-making body for vetting and prioritizing partnerships at UNGP, you will have our own, and they will have their own terms of reference.

The decision should include considerations on the clear allocation of financial and human resources to ensure realistic expectations are met, the right people are involved, and ultimately you deliver on your partnership commitments.

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<sup>1</sup> For more information on consent based decision making see:  
<https://www.sociocracyforall.org/consent-decision-making/>