

# Sightsavers Programme Partnership Policy

October 2023



# Contents

1. Introduction .....	3
2. Document history and change control .....	3
3. Scope of this policy .....	4
4. Partnership: definition and purpose .....	4
5. Partnership principles .....	5
6. Sightsavers' approach to partnership .....	8
Appendices .....	12
Appendix 1 – Minimum standards for partnership .....	13
Appendix 2 – Partnership Framework .....	14

**Version:** October 2023

**Version Owner:** Ken Moon, Chief Operating Officer

# 1. Introduction

---

Sightsavers' Partnership Policy outlines the principles and approaches that are fundamental to Sightsavers' programme partnerships. Our commitment to partnership and participation as a strategic principle is described in our **Programme Strategy**.

The policy lays out the seven core principles that underpin the spirit and values of partnership and that should be used to guide all programme partnerships. The policy aims to provide a common understanding of Sightsavers' approach to partnership, to promote consistency and coherence in our work with partners.

The policy also provides an overview of Sightsavers' approach to partner due diligence assessments and a summary of Sightsavers' partnership framework and minimum standards for partnership, to inform and guide our partnerships in practice.

Where this policy makes reference to partnership principles, approaches and frameworks, it refers to Sightsavers' **programme partnerships**.

# 2. Document history and change control

---

Date	Change control
Apr 2007	Programme Partnership Policy developed and approved by Trustees. It built on and incorporated parts of Sightsavers' earlier Partnership Development Framework (1999), which it replaced.
Dec 2015	Policy reviewed and updated: <ul style="list-style-type: none"><li>• Partnership principles reviewed and updated (with input from cross-organisational working group).</li><li>• References inserted to the newly-drafted partnership framework and accompanying Due Diligence tool launched in early 2016.</li><li>• Replaced the 5-stage "partnerships in practice" section with an appended summary of the new partnership framework (developed in March 2015).</li><li>• Appended Sightsavers minimum standards for partnership.</li></ul>
Oct 2023	Policy reviewed and updated: <ul style="list-style-type: none"><li>• Rebranded to new template.</li><li>• Text edits and formatting updates throughout, to reflect latest practices.</li><li>• Explicit reference to safeguarding expectations inserted.</li><li>• Approach to localisation / locally led development clarified and inserted.</li><li>• References to Programme Strategy inserted.</li><li>• References to due diligence expectations updated.</li><li>• Appendices updated to reflect recent edits to Minimum Standards for Partnership, and Partnership Framework.</li></ul>

### 3. Scope of this policy

---

Sightsavers' Programme Partnership Policy outlines the principles and approaches that are fundamental to our programme partnerships, to guide and support our work and to promote consistency and coherence in how we operate.

The focus of this policy is Sightsavers' relationships with **programme partner** organisations. These include government ministries and departments, national and international non-government organisations (NGOs), organisations of people with disabilities (OPDs), local community organisations and private sector companies. The policy applies to:

- **All downstream project and programme partnerships**, whether these are implementing or strategic, and whether or not they involve the transfer of funds.
- **All multilateral programme relationships**, including alliances, coalitions and consortia of partner organisations.

The policy **does not** apply to relationships with donors, suppliers or private contractors. However, its principles may still provide useful guidance for managing these types of relationship.

The policy is relevant to all Sightsavers staff who work directly or indirectly on our projects and/or with our programme partners. It provides staff with guidance, direction and a framework for negotiations when entering into a programme partnership.

This policy should be shared openly with all programme partners from the outset of a relationship and must be appended to all MoUs and Project Funding Agreements.

### 4. Partnership: definition and purpose

---

*Sightsavers defines partnership as a **mutually beneficial and interactive relationship** between two or more organisations, which is undertaken for a specific programmatic purpose, and which works towards a **shared goal** of positive and sustainable programme impact for the people and communities we serve.*

Sightsavers considers partnerships to be of vital importance in the way we work towards achieving our mission. The ultimate purpose of working in partnership is to increase the positive effects for the people and communities we serve. The benefits include:

- Partnership enables us to utilise the considerable experience, knowledge and contacts of **local organisations** already on the ground. By investing in local actors and generating respect for the role they play, we can increase the reach, effectiveness and accountability of our work.
- Partnership facilitates mutual **capacity development**; by supporting local partner organisations to develop their capacities (and by learning from their expertise), we can enable them to become stronger, more independent entities, better placed to operate autonomously and independently after Sightsavers' funding ceases.

- Partnership allows us to deliver sustainable services with existing organisations and service providers (our partners) and to **strengthen the overall system**, rather than setting up parallel services that can weaken and undermine existing systems.
- Partnership allows us to combine our resources and expertise with our partners', meaning that we can **operate more effectively**, and achieve more together than we would if we were working on our own.

## 5. Partnership principles

---

Sightsavers aims to develop relationships based on trust and respect, and will be guided by the following seven principles in its programme partnerships:

### Principle 1: Shared goals and compatible values

Our partners' goals should align with ours and provide a **clearly defined means of supporting our mission** to eliminate avoidable blindness and to ensure people with disabilities participate equally in society. Our partners' vision, values and ways of working should be **compatible with ours**.

A shared commitment towards achieving agreed goals is essential for working together. However, this does not mean that **all** organisational goals must be shared. Sightsavers seeks a level of compatibility but accepts that there may be some areas of difference in organisational goals or policies. So long as these do not represent a conflict of interest for the project or for the relationship, Sightsavers and partner organisations can agree to differ.

Core organisational values are less visible and easy to identify than programmatic goals, but they are equally important because of the way they influence how organisations work. Sightsavers recognises that compatible values are key to developing strong working relationships that will hold together even when facing difficulties.

### Principle 2: Mutual accountability

Sightsavers and our partners should be **accountable to each other and to other stakeholders** (including donors and the communities served by the project) for the partnership's actions, its use of resources, and the delivery of the intended outputs, outcomes and impact of the project.

The mutual rights and obligations between Sightsavers, partner organisations and the communities served by the project, must be established and formally agreed at the outset of a relationship. Although accountability traditionally focusses on funding and financial controls, Sightsavers also acknowledges the need to value and to be accountable for the use of other resources such as information, contacts, skills, experience, local knowledge, materials and equipment.

Some projects will be subject to formal external contracts (usually projects funded from institutional bodies such as FCDO, Irish Aid, USAID). In these instances, Sightsavers is responsible for ensuring that all donor contractual obligations are properly reflected in the project funding agreement (PFA) or an alternative legally binding contract with each programme partner.

Within the partnership:

- All parties are responsible for **providing the agreed inputs**, as outlined in the Project Funding Agreement (PFA) or Memorandum of Understanding (MoU). Inputs could include financial contributions, technical support, or the provision of equipment, staff or training.
- All parties are responsible for **delivering the outputs and activities** ascribed to them and as agreed between them in the results framework and work plan.
- All parties are responsible for **reporting the necessary data and case studies** to demonstrate progress. This must be in line with donor requirements, with any relevant data protection requirements, and with any data attribution arrangements that have been agreed between partners.
- All parties are responsible for ensuring **that expenditure falls within acceptable variance** from the agreed project budget.
- All parties must uphold their responsibilities to **good governance** (in line with the agreed governance structure of the project), ensuring that resources are used efficiently and for the intended purpose, and that the project delivers as much as possible for people and communities it serves.
- All parties are responsible for **assessing the potential risks** to project delivery and must work together to monitor and manage them on an ongoing basis.
- All parties must maintain **appropriate accounting standards** and record keeping, in accordance with legal and contractual obligations, including rigorous mechanisms for the prevention, detection and reporting of any fraudulent activities.
- All parties are responsible for ensuring that **partner due diligence processes** are properly followed within the agreed timeframe, and that any emerging recommendations are monitored and implemented in line with the agreed action plan. *See also section 6.4 below.*
- All parties are responsible for maintaining **appropriate safeguarding standards** and for reporting any safeguarding concerns or incidents in line with the process outlined in Sightsavers Safeguarding Policy and the partners' own safeguarding policy (or equivalent). *See also section 6.5 below.*

Externally there will also be other accountabilities that will need to be complied with:

- Sightsavers is accountable, primarily through its Board of Trustees, to its individual supporters and donors, to the UK Charity Commission and to the people and communities we serve.
- Our partner organisations' accountabilities will be different and may include their members, government, and other funding agencies. Ultimately, they too should be accountable to their stakeholders and the people and communities they represent.

### Principle 3: Ownership

Ownership of the programme, its goal, and intended outcomes should be **shared** among all partners, including local service providers and civil society bodies. Partners should take **joint and appropriate responsibility** for the programme and consider that it belongs to them.

Programme ownership by partner organisations and/or the communities involved is essential for motivation and for the sustainability of key activities in the long-term.

## Principle 4: Openness and understanding

.....  
The partnership should foster an **open and participatory dialogue**, with an emphasis on consultation and sharing of information from the earliest stages of the partnership. Partners should be able to discuss their concerns openly and without fear that it may affect the flow of funding.  
.....

Sightsavers believes that openness and honesty are essential in a working relationship in order to develop understanding and to build trust. If challenges occur, partners should adopt a positive approach to problem solving, focused on understanding what went wrong and how they can work together to get things back on track, rather than attributing blame.

Sightsavers believes that all members in a partnership need to:

- take the necessary time and effort to get to know and understand other partners.
- share information and opinions on matters of joint interest.
- be transparent on financial matters.
- have the right to speak out.
- respect each other's opinions.
- treat difficulties as shared problems and discuss them constructively.
- agree conflict resolution mechanisms at the outset.
- be willing to be flexible and adapt to each other.

## Principle 5: Joint learning and mutual support

.....  
The partnership must be **committed to learning** from its actions, its successes and its mistakes. Sightsavers and partner organisations should provide the necessary time, space and environment to facilitate formal and informal learning, and to ensure that all parties act upon lessons learnt.  
.....

Sightsavers recognises that learning is a crucial element in any successful partnership. All partner organisations need to work together to create a mutually beneficial learning environment and take the time to reflect on their own practices, share their experiences openly, and act upon any learnings that emerge.

Sightsavers is committed to strengthening learning practices and to supporting a structured approach to learning that provides opportunities for reflection, joint learning reviews and that facilitates learning processes between our partner organisations.

Through learning together, and through changing our actions and behaviour as a result of lessons learnt, we can improve relationships with and between partner organisations and improve the positive impact on the lives of the people and communities we serve.



## Principle 6: Respect

.....  
All partners have a right to be at the table and must have **mutual respect** for all other members of the partnership, irrespective of the size or power of any individual partner. The partnership should not be dominated by any one organisation and all partners should expect to be **treated fairly**.  
.....

Sightsavers and partner organisations must respect each other's mandates, obligations, principles and independence. Partners should be aware of the power dynamic within the relationship (for example, with regards to control of resources), but must work to ensure this does not become a form of control. Partners need to have confidence that the partnership will not be dominated by any one organisation, and that everyone's voice will be heard.

A strong relationship requires that partners should be recognised for **all** of their contributions; not simply those that are measurable in terms of cash value or public profile.

## Principle 7: Integrity

.....  
Sightsavers and partners should conduct all business and professional matters of the partnership and programme with **honesty, truthfulness** and **sincerity**, while remaining **fair** and **ethical** in all situations.  
.....

Both Sightsavers and its partners have an ethical obligation to each other to accomplish their tasks with integrity and in a responsible and appropriate manner.

Sightsavers has a set of minimum standards for partnership (see Appendix 1) and will not enter into partnership with organisations that cannot meet them. The list of thirteen criteria ensures that Sightsavers does not work with, for example, organisations that are not legally registered, that are linked to terrorism, that have an unacceptable approach to safeguarding, or that have a history of fraudulent or illegal activity.

## 6. Sightsavers' approach to partnership

---

### 6.1 Working with partners

Sightsavers works with partners (not through them). This means:

- equitable collaboration at all stages of the programme cycle, especially in design and setting of project goals.
- collaborating to achieve shared goals.
- contributing more than just financial inputs.
- valuing and respecting partner approaches, priorities, opinions and creativity.
- supporting capacity development and working towards localisation (also known as locally led development) and sustainability.

### 6.2 Localisation (locally led development) and sustainability

---



As outlined in our Programme Strategy, in all our programmes, we strive to make our own role either redundant (by strengthening partners, services and systems to be able to continue without us) or adaptable (by ensuring that any role we play in supporting or monitoring change is enabling rather than competing with existing structures). Simply put, we implement programmes with partners who are rooted in the systems and communities where we work. While in some circumstances we undertake research, implementation and influencing activities directly ourselves, our principal route to encouraging communities' participation in the development process is via partnerships, which help to enable and strengthen local organisations and to build sustainable accountability mechanisms.

In accordance with one of our seven core values (“**with the right resources, people can find their own solutions**”), Sightsavers recognises and respects the leadership of local Governments, service providers, and civil society actors in the countries where we work. We are committed to strengthening the leadership, capacity, and voice of local organisations where we are able to do so, thus ensuring that our projects and programmes address the needs of local populations (as defined by them) and increasing the reach, sustainability and effectiveness of our work.

We do this by:

- Identifying and working with Government bodies, local service providers and civil society organisations, including those that represent the people and communities we serve (for example OPDs and women’s organisations), at national, regional and/or district level.
- Ensuring that our partners have meaningful engagement in decision-making processes at all stages of the programme cycle and that they have a voice in shaping the priorities, reach and scope of the project in a participatory design process.
- Ensuring that project activities are embedded within (and strengthen) existing local structures and systems, and that they draw on and complement existing resources, staffing and service delivery mechanisms.
- Ensuring that partners are represented on project governance bodies, for example Steering Committees, where relevant, to promote local ownership and accountability.
- Providing tailored capacity development that meets our partner’s needs and priorities, and which supports them to become strong, effective and autonomous organisations.
- Ensuring that local partners are fairly compensated for their efforts and expenses in supporting the delivery of the project, including (where relevant/appropriate) contributions towards staffing and overhead costs.
- Ensuring that monitoring, evaluation and learning (MEL) activities are participatory and co-owned by local partners, to facilitate shared accountability and ownership.
- Working with partners to develop strategies for lasting change, where local partners are enabled to continue key activities when Sightsavers’ funding ceases at the end of the project lifespan. This can be achieved through building technical and institutional capacity of local partners, through leveraging/developing social and behavioural change within local communities, through strengthening local governance structures and policy frameworks, and through improving the long-term availability of local funding/inputs.

## 6.3 Wider collaboration

Sightsavers is committed to developing relationships where partners can collaborate with us beyond the immediate scope of the programme, both formally and informally. This could include cooperating on advocacy initiatives or working together to build or strengthen alliances and networks.

## 6.4 Due diligence

Sightsavers is committed to ensuring that we choose the right partners to work with and that we understand our partners' strengths and weaknesses and the implications for project design and management. Before entering into partnership, Sightsavers carries out a thorough due diligence exercise. There are two separate elements, the Minimum Partnership Criteria (MPC) assessment, and the full face-to-face Due Diligence assessment:

### Phase I: Minimum Partnership Criteria assessment (MPC)

- The MPC is a **pass/fail test**, carried out as early as possible during project design. It must be completed and signed off before any partner contract is signed. It checks whether the partner meets our 13 **minimum standards for partnership**, for example, that the organisation is properly registered, has no links to terrorism, is not bankrupt, and has not engaged in fraudulent or illegal activities.
- **All partners on all projects** must undergo an MPC, regardless of their funding status or previous history of work with Sightsavers. This includes consortium, strategic, research, employer, and implementing partners.
- Any **shortcomings must be swiftly mitigated** (usually over a 3-6 month period), through an action plan signed by both parties. If this is not possible, either because the risk is too severe, or the partner is unwilling to sign up to the plan, the partnership will not be approved.
- The MPC is run as **desk research** by a team of central experts to ensure an unbiased and consistent approach (Regional Finance / Programme Finance teams).

### Phase II: Full Due Diligence assessment

- The Due Diligence is an **in-depth, supportive review** of the partner's governance, policy framework and capacities, carried out during the first few months of the partnership, once the MPC is complete. It is an opportunity to identify any further need for improvement, support or capacity-building. Two versions of the assessment are available and are used depending on the risk profile: the **full assessment**, or the **safeguarding only assessment**.
- **Higher risk partners** are expected to undergo this second assessment. This means partners who will receive Sightsavers' funds, or implement project activities directly, or have direct contact with people served by the project, or manage settings that they attend (e.g., schools or hospitals).
- A long-term **action plan for improvement** is drawn up to address areas of weakness, and progress is monitored throughout the partnership.
- It is run as a **face-to-face review** with the partner, carried out by the programme team managing the partnership. Progress is monitored centrally.

Due diligence checks are initiated whenever any programme activity is planned that could lead to a partner contract (MoU or PFA) being drawn up. This could be within an existing project (if it is renewed into a new phase, or if a new partner joins mid-term) or a new project. Organisations with whom we have previously worked are still expected to go through the due diligence process if it has been two years or more since their previous assessment.

A list of our Minimum Criteria for Partnership which are assessed during the MPC process can be found in Appendix 1 of this document. Any major risks with the potential to derail the partnership are identified and addressed at MPC stage.

If the subsequent due diligence exercise reveals further weaknesses, this does not usually mean that Sightsavers shouldn't work with the partner (although occasionally this may be the case if significant further shortcomings are uncovered). Rather, the full due diligence provides a forum to review and discuss general capacities and the impact upon the project. For example:

- Should Sightsavers offer additional support to the partner, and if so, how should this be provided?
- Should Sightsavers put in place extra controls or closer monitoring processes, to safeguard project delivery?
- Should Sightsavers support the partner with capacity development, and if so, what are the priority areas and why?

## 6.5 Safeguarding

In line with Sightsavers' Safeguarding Policy, we expect all of our programme partners to take an appropriate approach to safeguarding to ensure that project participants and stakeholders are protected from harm, abuse and exploitation. This is assessed during our partner due diligence process, and any shortcomings are addressed in a formal plan of action that is signed off by both parties and monitored to ensure compliance.

All Sightsavers partners are required to:

- Have a safeguarding policy (or equivalent) in place, that meets the standards outlined in our due diligence tools. We offer resources, guidance, and tailored support to any partners that need assistance to draw up a policy or to strengthen an existing one.
- Sign our Code of Conduct for Partners and Suppliers, which outlines our expected standards and behaviours, and is appended to all MoUs and PFAs.
- Attend safeguarding training during the project inception period, which is run by our global network of Safeguarding Focal Persons (SFPs).
- Report any safeguarding concerns or incidents immediately to the local Sightsavers office or to the Sightsavers Safeguarding Manager, in line with the process outlined in our Safeguarding Policy.

The expectations above are clearly outlined in our MoU and PFA clauses and are covered in depth during partner safeguarding training during project inception. A copy of our Safeguarding Policy is also appended to all MoUs and PFAs.

## 6.6 Organisational development

Sightsavers is committed to supporting the technical and/or organisational capacity-building of local partner organisations and relevant networks, consortia and coalitions. This will be directed by the findings of the due diligence exercise (see above), and will be influenced by the following factors:

- **Type of partner organisation:** Sightsavers-supported capacity development is most commonly provided for organisations such as OPDs, community organisations, civil society groups, and small national or local NGO partners, though sometimes support is also provided to Government and private sector partners.
- **Project complexity:** partners involved in large, complex projects or programmes require high levels of capacity in order to deliver the project successfully and may therefore be more likely to require capacity development than partners involved in smaller, more straightforward projects.
- **Receptiveness of partner:** the partner organisation must be willing to collaborate with Sightsavers to address the identified capacity gaps, in order for a capacity development plan to be successfully drawn up and implemented.
- **Affordability and sustainability:** any organisational development must be affordable (i.e. is in line with the donor's expectations or with availability of Sightsavers' unrestricted funds), and should be targeted where possible on areas that will have greatest impact on project delivery, and/or that will provide sustainable benefit once funding ceases.

Sightsavers-supported capacity development can take many forms, including (but not exclusively):

- full or partial funding for formal external training, for example workshops, courses or dedicated support from external consultants or technical specialists.
- Sightsavers-led training, mentoring or consulting activities.
- facilitating contact between partner organisations and others and encouraging collaboration to promote synergies, skills transfer and mutual learning.

## 6.7 Tailored approach:

Sightsavers negotiates appropriate ways of working with each partner organisation, and forms of support to suit the individual circumstances.

## 6.8 Sustainable outcomes and impact:

Sightsavers seeks to achieve sustainable project outcomes and impact. We work with partners to develop strategies for lasting change, and to work towards technical, financial, and institutional sustainability, whereby partners are enabled to continue key activities and provide or mobilise resources when Sightsavers' funding ceases at the end of the project.

## Appendices

Sightsavers' minimum standards for partnership and a summary of Sightsavers' partnership framework are appended to this policy.

## Appendix 1 – Minimum standards for partnership

---

In order to enter into a programme partnership, **Sightsavers must be satisfied that none of the following criteria apply**. The criteria are reviewed in the first stage of our due diligence process, which is run with all potential partners during project design.

If credible evidence is found against any of these criteria, it will be escalated as appropriate within Sightsavers to discuss and agree whether or not any mitigating actions can be put in place with the partner to address the issue(s). If so, these will be formally documented and signed off between both parties and monitored to ensure compliance. If mitigation is not feasible, the partnership will not go ahead.

For partnerships approved to proceed, a subsequent in-depth due diligence review of capacities, reputation and safeguarding framework is undertaken during project inception.

### **Sightsavers' minimum standards for partnership (none should apply):**

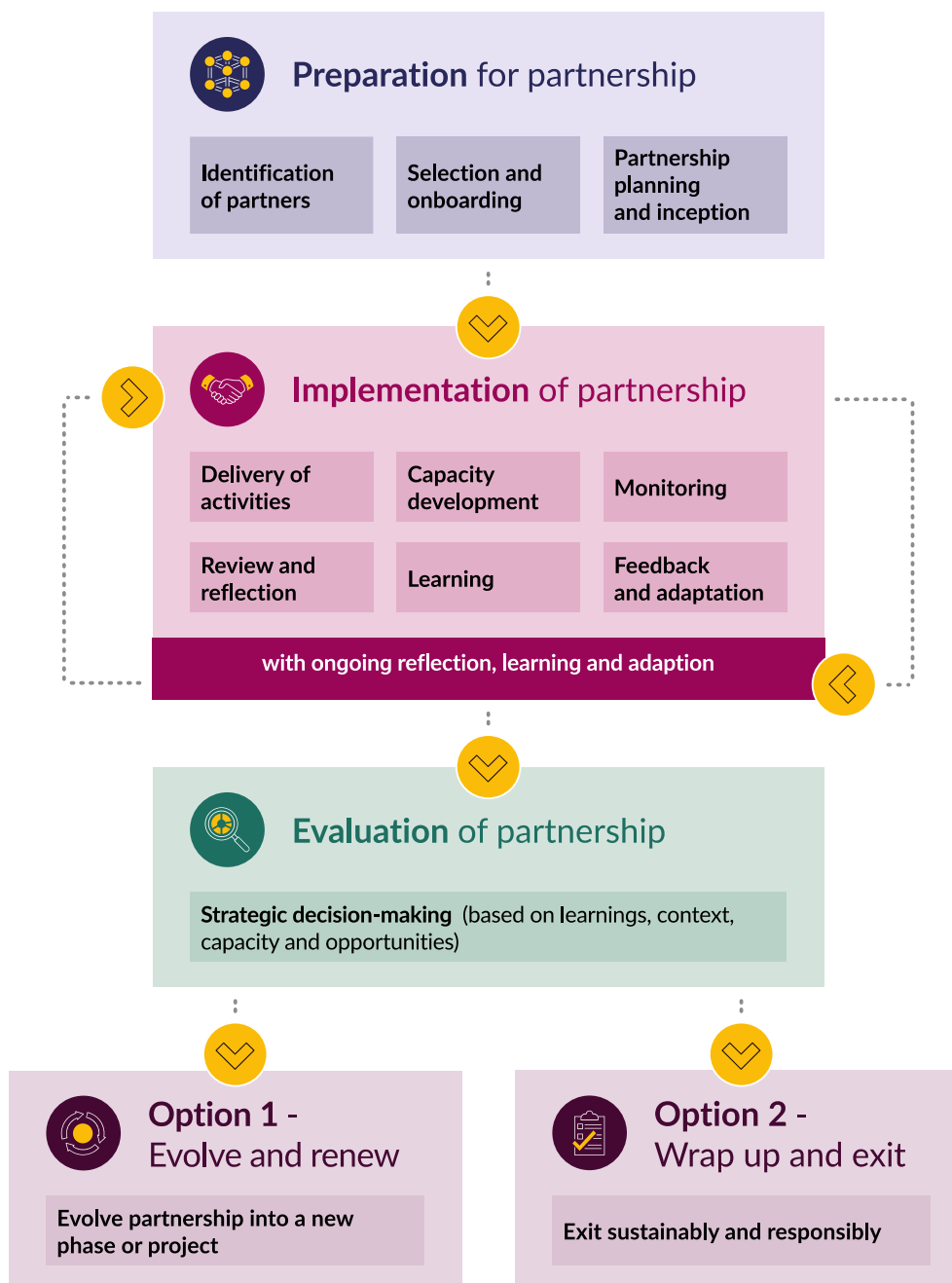
1. The organisation's mission and values are in conflict with Sightsavers' own.
2. The organisation intentionally discriminates against people on the grounds of religion, politics, race, tribe, caste, age, disability, gender, ill-health, sexual orientation etc.
3. The organisation has been found to be exposing its stakeholders, including women, children and other marginalised groups, to any form of abuse or exploitation.
4. Funding the partner would cause conflict or have legal implications for any other existing partnerships or relationships, including with donors.
5. The organisation has been linked to ethical or human rights controversies.
6. The organisation implicitly or explicitly hopes to use its work with Sightsavers for converting programme stakeholders to any kind of political or religious belief.
7. The organisation has failed to register itself appropriately as a legal entity under local laws.
8. The organisation has not complied with the laws under which it was formed.
9. The organisation and/or its executives have been found to be involved in fraudulent or illegal activities.
10. The organisation is bankrupt, being wound up, under administration by the courts, entering arrangement with creditors, has suspended business activities or is the subject of legal proceedings.
11. The organisation has been convicted of an offence concerning professional conduct in the last two years.
12. The organisation has been blacklisted by government or regulatory bodies and/or is suspected of furthering its aims through violence or terrorist activities.
13. The organisation has failed to demonstrate an acceptable approach to safeguarding.

## Appendix 2 – Partnership Framework

# Phased guide for partnership management

Developing effective partnerships is a key strategic objective and it is essential for the successful delivery of our projects and programmes.

This Partnership Framework supports and operationalises our **Programme Partnership Policy**. It outlines our phased approach to partnership management and translates each phase into a step-by-step plan, showing the key activities that take place during each phase, and the organisational tools and templates that are available to support each of them. The framework also outlines responsibilities, leadership, and technical oversight for each activity.





# 1. Preparation for the partnership

The preparatory phase is all about laying the groundwork for a successful and productive partnership. These activities are an investment for the future and ensure that all parties are clear about the proposed collaboration, its scope and purpose, how and why we are going to work together, and any risks and issues that we need to be mindful of.



## Preparation for partnership

**Identification  
of partners**

**Selection and  
onboarding**

**Partnership  
planning  
and inception**



## 1.1 Identification of potential partners

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
1.1.1. <b>Draft purpose and goals of the partnership</b> via the project strategy and intervention logic.	To give clarity on the scope and purpose of the anticipated partnership, to inform stakeholder mapping and decision-making on who to engage.	For current phase of project or partnership: <ul style="list-style-type: none"> <li>• PDP templates (concept note, proposal, theory of change, results framework, budget)</li> <li>• OPD engagement strategy</li> <li>• Programme partnership policy</li> </ul>	Project team	<ul style="list-style-type: none"> <li>• PS2 Operations</li> <li>• Technical Lead</li> <li>• Country Director (or equivalent)</li> </ul>
1.1.2. <b>Conduct in-country context analysis</b> and strategic stakeholder mapping.	To understand who is out there, what services they provide, who they represent, how they could help us deliver, what we have learnt from previous collaborations, and who we should prioritise for engagement.	From previous phases of project or partnership (where applicable): <ul style="list-style-type: none"> <li>• Partnership Review &amp; Reflection form</li> <li>• Project exit/evaluation documentation</li> </ul>		
1.1.3. <b>Review learnings from previous partnership (or previous phases of the project)</b> to feed into planning for the new collaboration.				
1.1.4. <b>Produce shortlist of potential partners.</b>				
1.1.5. <b>Run participatory project design process.</b>	To ensure that potential partners' views, needs, and priorities are reflected and incorporated within project design.			

## 1.2 Partner selection and onboarding

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
1.2.1. Run MPC assessments on potential partners to check alignment with our minimum partnership criteria.	To ensure that all partners can meet our minimum standards within an acceptable timeframe, and that any significant risks/issues can be suitably mitigated.	<ul style="list-style-type: none"> <li>MPC tool</li> </ul>	Due Diligence team and central MPC assessors	<ul style="list-style-type: none"> <li>Due Diligence team</li> </ul>
1.2.2. Secure partner agreement to take forward any MPC actions.			Project team	
1.2.3. Select final partners, based upon MPC findings, the localisation agenda, and organisations' willingness and ability to engage.	To finalise the number, nature, and scope of the intended partnerships.	<ul style="list-style-type: none"> <li>PDP templates</li> </ul>	Project team	<ul style="list-style-type: none"> <li>PS2 Ops</li> <li>Technical Leads</li> <li>Country Director (or equivalent)</li> </ul>
1.2.4. Finalise the purpose and goals of the partnership, the role that the partner will play, and how their efforts will be recompensed.				
1.2.5. Draw up contract with partner, ensuring their role, funding status, MPC mitigations and any donor requirements are suitably incorporated.	To ensure that formal contracts are in place to direct the partnership (including any transfer of funds) and to provide appropriate legal protection to all parties.	<ul style="list-style-type: none"> <li>PFA template</li> <li>MoU template</li> </ul>	Project team	<ul style="list-style-type: none"> <li>Compliance</li> <li>Programme Finance &amp; Risk</li> <li>NTD Finance &amp; Risk</li> </ul>
1.2.6. Set up the partner and/or partnership in internal systems (including Proactis, SUN, Programme Portal)	To establish mechanisms for managing the data, administration, reporting and fund transfers related to the partnership.	<ul style="list-style-type: none"> <li>Organisational systems</li> </ul>	Due Diligence team and Finance Operations	<ul style="list-style-type: none"> <li>Due Diligence team</li> </ul>

## 1.3 Partnership planning and inception

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
1.3.1. <b>Conduct full due diligence for all funded and implementing partners.</b> (Non-funded, strategic partners are usually exempted).	To build a detailed picture of partner strengths and weaknesses, including any areas that require support, improvement, or capacity development and how these can be addressed over the course of the project.	<ul style="list-style-type: none"> <li>• Due diligence template and action plan</li> <li>• Due diligence guidance notes</li> </ul>	Project team	<ul style="list-style-type: none"> <li>• Due Diligence team</li> </ul>
1.3.2. <b>Agree project governance structure</b> in line with any donor requirements.	To ensure all parties are clear on roles, responsibilities, governance arrangements, communication channels, and expectations, and the part that they each will play.	<ul style="list-style-type: none"> <li>• Project-specific governance documents</li> </ul>		<ul style="list-style-type: none"> <li>• IFT/Fundraising (where relevant)</li> <li>• Country Director (or equivalent)</li> </ul>
1.3.3. <b>Ensure partners are clear on their roles and responsibilities</b> as outlined in the implementation plan.		<ul style="list-style-type: none"> <li>• Implementation plan</li> <li>• Project roles &amp; responsibilities matrix</li> </ul>		<ul style="list-style-type: none"> <li>• Country Director (or equivalent)</li> </ul>
1.3.4. <b>Agree financial and narrative reporting expectations and schedule.</b>		<ul style="list-style-type: none"> <li>• Donor contract</li> </ul>		<ul style="list-style-type: none"> <li>• IFT/Fundraising</li> <li>• Programme Finance &amp; Risk</li> <li>• NTD Finance &amp; Risk</li> </ul>
1.3.5. <b>Agree monitoring expectations and schedule</b>		<ul style="list-style-type: none"> <li>• M&amp;E plan</li> </ul>		<ul style="list-style-type: none"> <li>• Country Director (or equivalent)</li> </ul>



## 2. Implementation of the partnership, with ongoing reflection, learning and adaptation

The implementation phase is where the partnership gets underway. These activities focus on project implementation, partner capacity strengthening initiatives and progress monitoring to check whether things are on track. Regular reflection, learning and adaptation is important throughout this phase, to ensure that if anything is not working well, we take time to consider what could be changed or improved.



### Implementation of partnership

Delivery of activities

Capacity development

Monitoring

Review and reflection

Learning

Feedback and adaptation

with ongoing reflection, learning and adaption

## 2.1 Delivery of partnership activities

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
2.1.1. <b>Implement project activities</b> in line with workplan.	To work towards the overall goal, purpose, outputs and outcomes of the project and partnership.	<ul style="list-style-type: none"> <li>Implementation plan</li> </ul>	Project team	<ul style="list-style-type: none"> <li>Country Director (or equivalent)</li> <li>Technical Lead</li> <li>Global PM (where applicable)</li> </ul>
2.1.2. <b>Ensure appropriate oversight and management of partnership activities.</b> This will be done through the agreed project governance structure.	To ensure clear mechanisms are in place to oversee whether the project and partnership is performing as it should, and to manage and mitigate any risks to delivery.	<ul style="list-style-type: none"> <li>Project roles &amp; responsibilities matrix</li> <li>Project monitoring visits/calls</li> </ul>		
2.1.3. <b>Manage any risks and issues to the project or partnership.</b> Escalate any serious issues, as required.		<ul style="list-style-type: none"> <li>Project risk register</li> </ul>		<ul style="list-style-type: none"> <li>Country Director (or equivalent)</li> </ul>
2.1.4. <b>Report regularly on progress</b> to showcase performance.	To ensure that relevant colleagues and donors are kept abreast of progress.	<ul style="list-style-type: none"> <li>Reporting templates</li> </ul>		
2.1.5. <b>Reflection:</b> Hold regular sessions with partners to discuss whether the partnership is delivering as it should.	To ensure regular reflection and learning on whether the partnership is delivering as planned, and if not, why - and what could be changed or adapted to resolve this.	<ul style="list-style-type: none"> <li>Partner progress review meeting template</li> </ul>		
2.1.6. <b>Learning:</b> Capture details of what is working, and what is not, and any change or improvement required. Disseminate to appropriate audience(s).		<ul style="list-style-type: none"> <li>Learning and adaptation logs (<i>where relevant</i>)</li> </ul>		
2.1.7. <b>Adaptation:</b> Implement any necessary changes/ adaptations to partnership management or to project activities and approaches, in response to learning and reflection gathered.		<ul style="list-style-type: none"> <li>n/a</li> </ul>		

## 2.2 Partner capacity development

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
2.2.1. <b>Ensure that partner MPC and due diligence action plans are implemented.</b>	To ensure that the partner is building the necessary skills and capacities to deliver the project, and to become a stronger, more sustainable organisation.	<ul style="list-style-type: none"> <li>MPC / Due Diligence action plans</li> </ul>	Project team	<ul style="list-style-type: none"> <li>Country Director (or equivalent)</li> <li>Due Diligence team</li> </ul>
2.2.2. <b>Support partner with any wider capacity building needs.</b> Identified during project design or delivery. (e.g. thematic technical skills/training, inclusion training, accessibility audits.)		<ul style="list-style-type: none"> <li>Capacity building plan</li> <li>Accessibility audit reports and actions.</li> </ul>		<ul style="list-style-type: none"> <li>Country Director (or equivalent)</li> <li>Technical Leads</li> </ul>
2.2.3. <b>Ensure partner has access to safeguarding training</b> and any other standard provisions.		<ul style="list-style-type: none"> <li>Partner safeguarding training package</li> </ul>		<ul style="list-style-type: none"> <li>Country Director (or equivalent)</li> <li>Safeguarding team</li> </ul>
2.2.4. <b>Reflection:</b> Hold regular sessions with partners to review whether training and capacity development plans are progressing in line with agreed timeframes.	To ensure regular reflection and learning on whether partner capacity development is progressing as planned, and if not, why - and what could be changed or adapted to resolve this.	<ul style="list-style-type: none"> <li>Due diligence action plan</li> <li>Partner monitoring visit report template</li> <li>After Action Review (AAR) for training</li> </ul>		<ul style="list-style-type: none"> <li>Country Director (or equivalent)</li> </ul>
2.2.5. <b>Learning:</b> Capture details of what is working, and what is not, and any change or improvement required. Disseminate to appropriate audience(s).		<ul style="list-style-type: none"> <li>Learning and adaptation logs (where relevant)</li> </ul>		
2.2.6 <b>Adaptation:</b> Implement any necessary changes/ adaptations to partner capacity development activities and approaches, in response to learning.		<ul style="list-style-type: none"> <li>n/a</li> </ul>		

## 2.3 Partnership monitoring

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
2.3.1. <b>Monitor the strength and overall capacities of the partner.</b>	To ensure that the partner has – or is developing – the necessary skills to deliver the project, and to become a stronger, more sustainable organisation.	<ul style="list-style-type: none"> <li>• Due diligence action plan</li> <li>• Capacity development plans</li> </ul>	Project team	<ul style="list-style-type: none"> <li>• Country Director (or equivalent)</li> </ul>
2.3.2. <b>Monitor the health of the partnership:</b> <ul style="list-style-type: none"> <li>- The quality of the working relationship and the extent to which expectations are being met.</li> <li>- How partners are feeling, any issues/worries they share, or anything reported on SpeakUp.</li> <li>- The extent to which partnership management quality standards are being met.</li> </ul>	To ensure that the partnership relationship is healthy and productive, and that any concerns or worries are raised and dealt with promptly and effectively.	<ul style="list-style-type: none"> <li>• Partner progress review meeting template</li> <li>• SpeakUp platform</li> <li>• PCM QSAT</li> </ul>		
2.3.3. <b>Monitor partner performance</b> by tracking activities, expenditure, and output/outcome indicators, ensuring they perform to target.	To ensure activities, outputs, and expenditure are tracked and that any issues can be swiftly identified and mitigated, helping to keep the project and partnership on track and within budget.	<ul style="list-style-type: none"> <li>• Partner progress review meeting template</li> <li>• Partner financial monitoring report template</li> <li>• Project results framework</li> </ul>		



What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
2.3.4. <b>Reflection:</b> Hold regular sessions within the project team to review whether partnership monitoring activities are progressing as planned.	To ensure regular reflection and learning on whether partnership monitoring activities are progressing as planned, and if not, why - and what could be changed or adapted to resolve this.	<ul style="list-style-type: none"> <li>n/a</li> </ul>	Project team	Country Director (or equivalent)
2.3.5. <b>Learning:</b> Capture details of what is working, and what is not, and any change or improvement required. Disseminate to appropriate audience(s).		<ul style="list-style-type: none"> <li>Learning and adaptation logs (where relevant)</li> </ul>		
2.3.6. <b>Adaptation:</b> Implement any necessary changes/ adaptations to monitoring activities and approaches, in response to learning and reflection gathered.		<ul style="list-style-type: none"> <li>n/a</li> </ul>		



### 3. Partnership evaluation

Towards the end of the partnership collaboration, an evaluation phase provides the space to capture learnings and reflection from the partnership. These activities inform decision-making about the future of the relationship and whether the partnership should be renewed or closed out.



#### Evaluation of partnership

**Strategic decision-making** (based on learnings, context, capacity and opportunities)

## 3.1 Evaluation and strategic decision-making

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
<p>3.1.1. <b>Review and evaluate partner performance</b> - did the partnership deliver what was needed to achieve project goals?</p> <p>3.1.2. <b>Review and evaluate the partnership relationship</b> - what was the conclusion of the regular partnership review sessions? Was the partnership healthy and productive, were issues resolved satisfactorily?</p> <p>3.1.3. <b>Review and evaluate partner capacity</b> - were training and capacity development plans implemented, was the partner receptive and responsive, and has their capacity been suitably strengthened?</p> <p>3.1.4. <b>Review and evaluate local context and opportunities</b> - does the partner have appropriate skills, expertise, and/or linkages to be a continued collaborator? Do they represent the interests of priority groups?</p>	<p>To capture learnings and reflection to inform decision-making about the future of the relationship.</p>	<ul style="list-style-type: none"> <li>Partnership Review and Reflection Form</li> </ul>	<p>Project team <i>(in the final 12 months of the project)</i></p>	<ul style="list-style-type: none"> <li>Country Director <i>(for in-country partnerships)</i></li> <li>Departmental Director <i>(for centrally managed partnerships).</i></li> </ul>
<p>3.1.5. <b>Strategic decision making:</b> based on the evidence reviewed, and the availability of potential funds for new work, should the partnership be evolved/renewed, or should it be closed out?</p>	<p>To arrive at a well-informed decision about the future of the relationship.</p>	<ul style="list-style-type: none"> <li>ROAR and Go-No-Go <i>(for project and thematic level decisions)</i></li> <li>Project Design Process (PDP) <i>(for partnership level decisions)</i></li> </ul>	<ul style="list-style-type: none"> <li>ROAR Committee and Directors</li> <li>Project design team</li> </ul>	<ul style="list-style-type: none"> <li>ROAR Committee and Directors</li> <li>PS2 Operations</li> </ul>



## 4. Renew or Exit

The renew or exit phase takes the partnership down one of two possible routes, depending



### Option 1 - Evolve and renew

Evolve partnership into a new  
phase or project



### Option 2 - Wrap up and exit

Exit sustainably and responsibly

on the decision reached during the previous partnership evaluation stage. Some partnerships will evolve and renew into a new phase of collaboration; others will need to be closed out.

## 4.1 Option 1: Evolve and renew the partnership

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
4.1.1. <b>Ensure that learnings and reflection from the partnership evaluation are captured in writing.</b>	To capture information to inform and guide the new phase of the partnership.	<ul style="list-style-type: none"> <li>Partnership Review and Reflection Form</li> </ul>	Project team	<ul style="list-style-type: none"> <li>PS2 Operations</li> <li>Technical Lead</li> <li>Country Director (or equivalent)</li> </ul>
4.1.2. <b>Repeat the partnership cycle;</b> go back to section 1.1 to plan for partnership under a new project, or a new phase of the existing project.				

## 4.2 Option 2: Wrap up and exit the partnership

What activities need to be organised?	Why?	What tools/templates support this?	Who is responsible	Who oversees this activity?
4.2.1. <b>Ensure that learnings and reflection from the partnership evaluation are captured in writing.</b>	To capture information for organisational learning, and to feed into any potential rejuvenation of the relationship in the future.	<ul style="list-style-type: none"> <li>Partnership Review and Reflection Form</li> </ul>	Project team	<ul style="list-style-type: none"> <li>Country Director (or equivalent)</li> </ul>
4.2.2. <b>Follow organisational close out procedures</b> to exit and wrap up the project and partnership.	To ensure that the partnership is exited in an organised, responsible, and properly documented fashion, and in a way that promotes and enhances sustainability.	<ul style="list-style-type: none"> <li>PCM QSAT</li> <li>Project Close Out guidance and checklist</li> </ul>		
4.2.3. <b>Support the partner to plan for ongoing operations</b> and take forward the legacy of the project/partnership.		<ul style="list-style-type: none"> <li>Project sustainability plan and exit strategy</li> </ul>		

We work with partners in low-  
and middle-income countries to  
eliminate avoidable blindness  
and promote equal opportunities  
for people with disabilities.

[www.sightsavers.org](http://www.sightsavers.org)

[www.sightsavers.org](http://www.sightsavers.org)

Registered charity numbers 207544 and SC038110

