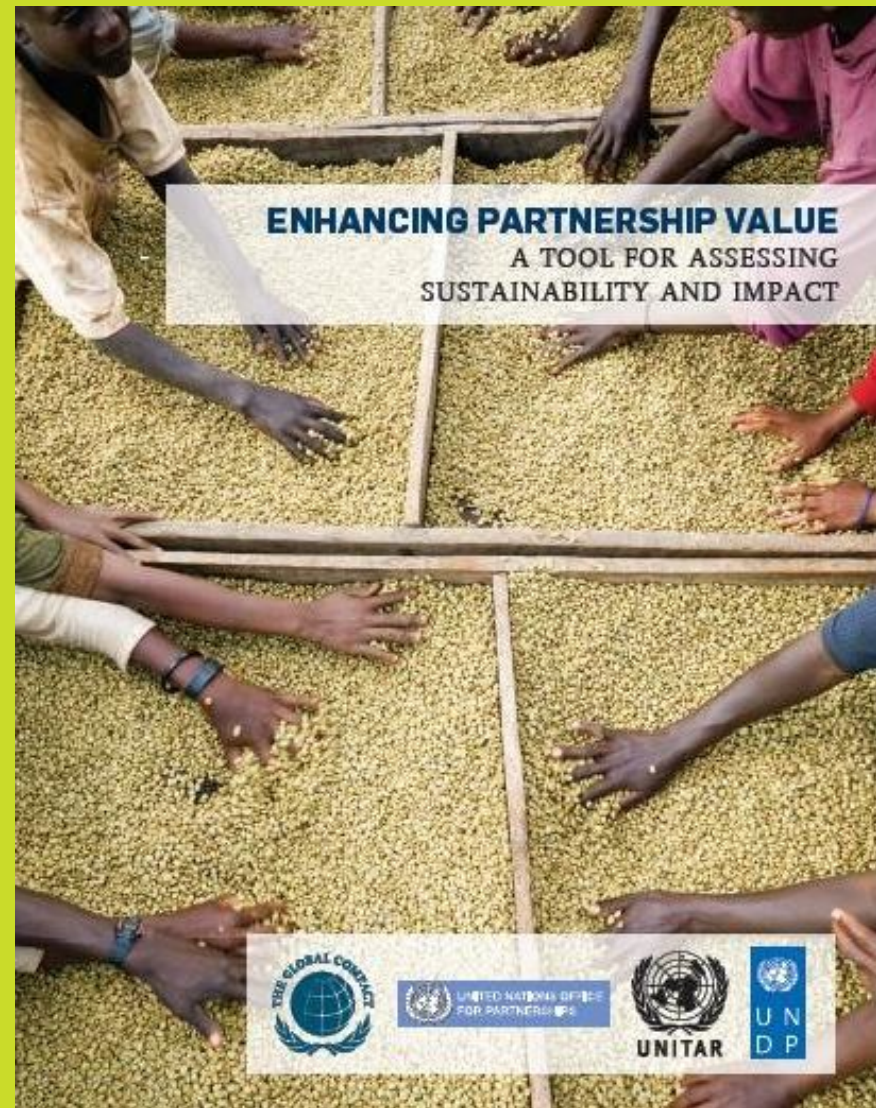
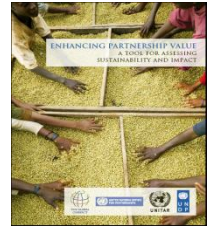


# THE PARTNERSHIP ASSESSMENT TOOL – ENHANCING PARTNERSHIP VALUE



**Global Compact Office – Oct 2008**

# The UN Global Compact and UN-Business Partnerships



Overview: Why is the UN Global Compact active in this area?

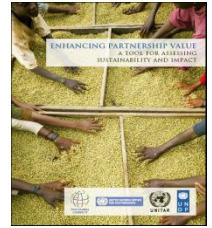
1. The 2005 and 2007 General Assembly Resolutions "Towards Global Partnerships".
2. The second objective of the Compact "Engage in partnerships in support of broad UN goals i.e. the Millennium Development Goals"
3. Principles and projects are complementary. Unique comparative advantage in forging partnerships if the UN's value proposition and operational priorities form one integrated platform.

The Global Compact: A values-platform that can provide the basis for long term, sustainable relationships with business.



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# Enhancing Partnership Value - The Partnership Assessment Tool



## Background:

“The challenge is now to move from the current phase of experimentation towards a more systematic approach to partnerships that includes a greater focus on their impact and sustainability”

*(Towards Global Partnerships, A/60/214, 2005)*

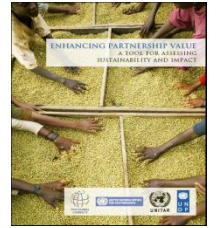
“The purpose of the project is to develop a tool to assess the sustainability and long-term impact of partnerships”

*(Project concept note, Sept 2006)*



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# Enhancing Partnership Value - The Partnership Assessment Tool

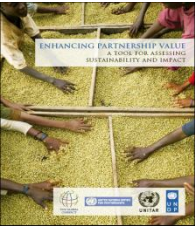


A joint project led by four UN agencies to improve the **effectiveness, impact** and **sustainability** of partnerships for development



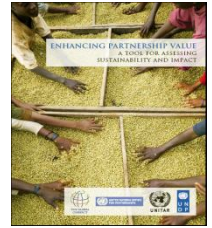
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# Involving a number of UN entities....



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# And businesses....



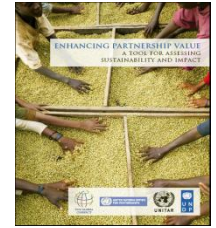
Unilever

THE BOSTON CONSULTING GROUP



United Nations Global Compact

# The Partnership Assessment Tool (PAT)



## The Partnership Assessment Tool



A simple online tool to prospectively assess the value of partnerships

Designed to build a strong foundation before implementation

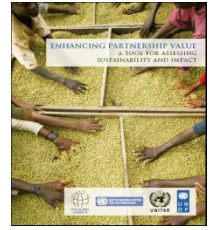
Benefits both UN and business partners – to be used individually or collectively

Distributed free-of-charge on a CD-ROM from partner UN agencies



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# Agenda



## Six Dimensions of Sustainability

Alignment

Internal Partnership Management

External Partnership Management

Multiplier Effect

Environment

Socioeconomic

## Summary Assessment

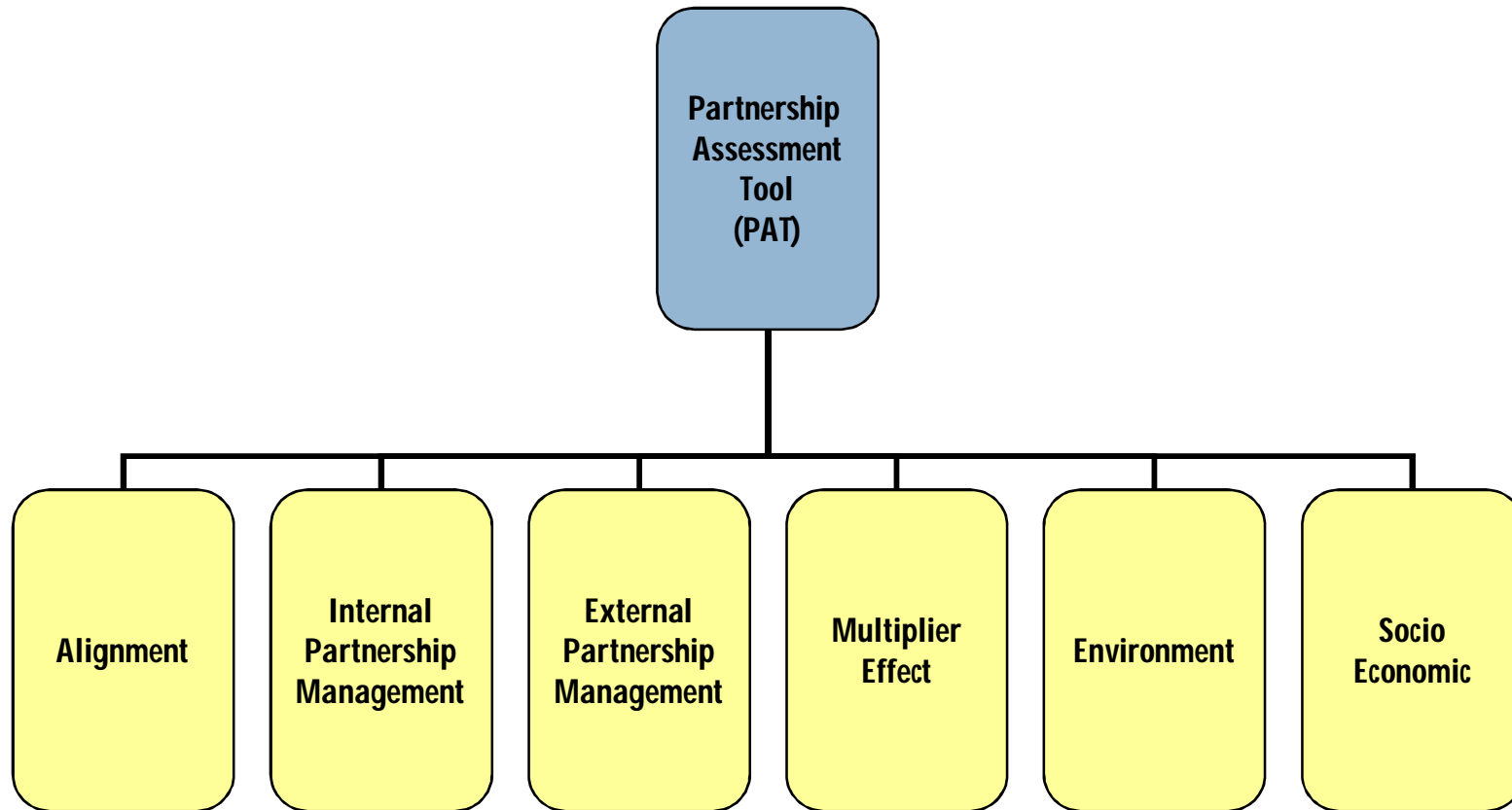
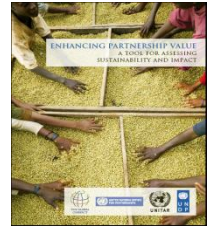
Ratings

Overall Assessment



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# Six Dimensions of Sustainability



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# Partnership Assessment Tool



United Nations



## User Guide :

[Home](#)

[About](#)

[SignOut](#)

Using the Partnership Assessment Tool (PAT) is a simple and straightforward experience. It begins at the point where you, the UN or business project manager, have essentially completed the phase of project planning and are nearing the point of beginning project implementation.

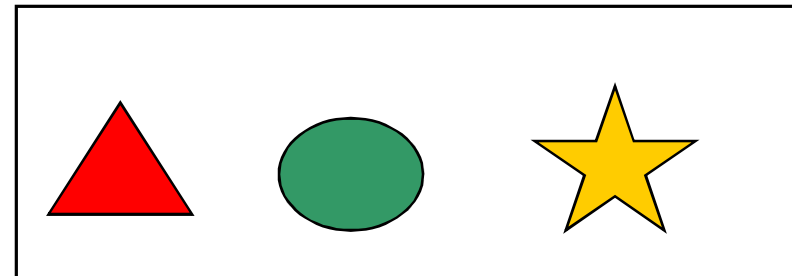
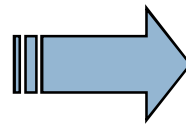
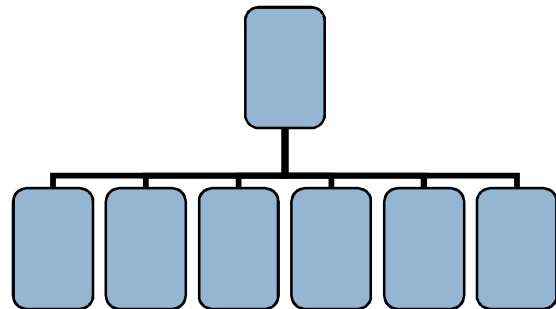
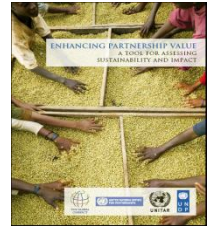
These are the sets of sections you will be taken through while using the tool



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# Logical tree structure of PAT



Area	Component	Red light	Green light	Yellow star
<b>Alignment</b> The section focuses on the alignment between the UN and business partners, including common objectives, risk-profiles and comparative advantages.	<b>Objectives</b> Do the partners have shared and explicit objectives?	Have not formed an agreement (MoU or project document)	There are shared goals (MDGs) and a formal agreement (project document).	Shared objectives and an understanding of the strategy/approach to undertake to achieve them exist, and are explicit in the project document. Moreover, differences between partner's objectives are acknowledged.
		Indicate MDGs targeted (from list of 8 MDGs) - COPY FROM INITIAL SURVEY		

E  
x  
a  
m  
p  
l  
e



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# Partnership Assessment Tool



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## Assessment

[Home](#)

[About](#)

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### UN Partner

Name of UN Partner

#### Name of the Partnership Manager

Last Name  First Name

#### Contact Information

Phone (Optional)  e-mail (Optional)

### Business Partner

Name of Business Partner

#### Name of the Partnership Manager

Last Name  First Name

#### Contact Information

Phone (Optional)  e-mail (Optional)

Submitted by  UN Partner  Business Partner

### Project Details

Project Name

#### Project Implementation Details

Expected Start Date Year  Month

Expected End Date Year  Month

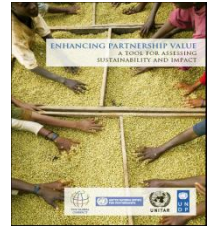
Country where Project is being Implemented (If More than one Country Please enter the Region Name)

Region : (Enter only if multiple countries)

[< Back](#)

[Next >](#)

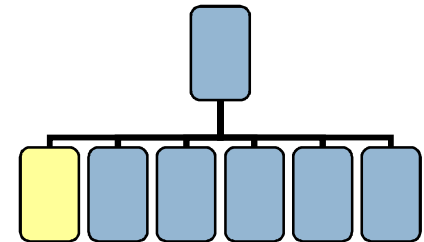
# Alignment



Do the partners have shared and explicit objectives?

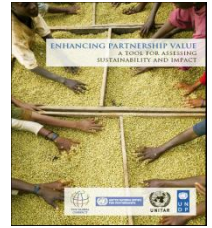
Have the partners defined each one's value add (comparative advantages/competencies) to the partnership?

Are the partners aware of potential risks emerging from the partners past or current activities?

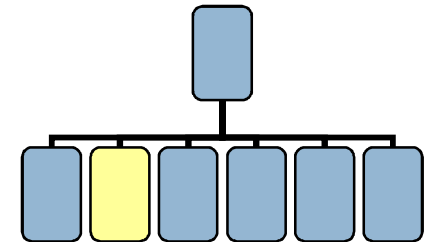


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# Internal Partnership Management



Are the responsibilities of the partners clear and explicit? Are governance mechanisms clear and explicit?



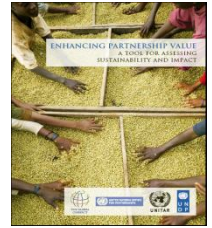
Have outputs and milestones been established for the partnership timeframe? Are there clear mechanisms for monitoring performance and tracking achievement of milestones?

Have partners identified required resources (financial and other) to complete activities and meet milestones?



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# External Partnership Management

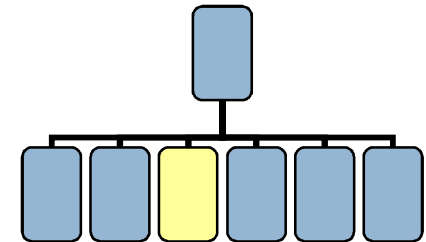


Are the partnership processes transparent and are there envisioned information sharing strategies?

Is the partnership set up in a fashion to leverage and integrate its stakeholders?

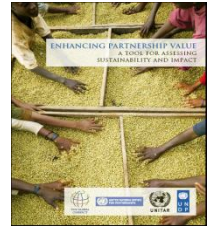
Are there mechanisms in place to ensure beneficiaries absorb the running of activities and benefits continue to be generated?

To what extent will the project lead to the creation/strengthening of relationships between the private sector, civil society and government?

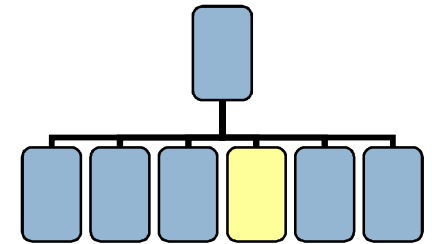


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# Multiplier Effect



Is the partnership envisioned to be scaled-up by the partners or other parties?

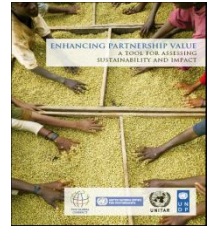


Is the partnership set up to be replicated extensively by the partners or other parties?



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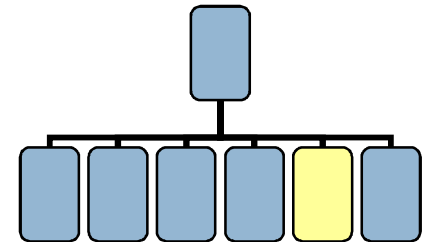
# Environment



To what extent do the activities entailed in the partnership impact / benefit biodiversity in the area of operations?

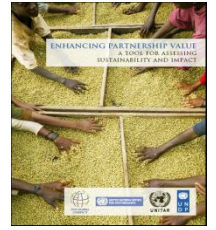
To what extent do the activities entailed by the partnership make an efficient and clean use of natural resources?

To what extent do the activities entailed by the partnership make optional use of energy resources to limit contribution to climate change?



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# Socioeconomic



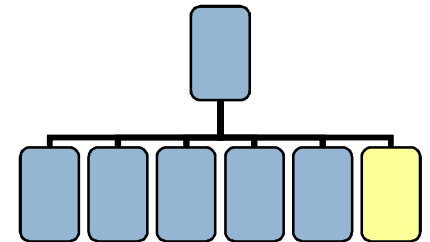
Can the project's needs for employees be met by the local market?

Can the project's needs for goods and services be met by the local market?

To what extent do the project's activities impact the productivity of the local population / business?

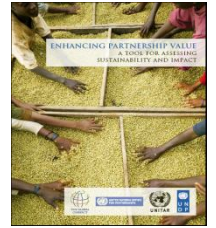
Can the project increase access to affordable products/services for the poor?

To what extent do the project's activities impact local infrastructure?



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# Socioeconomic

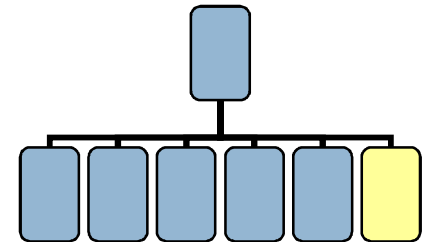


To what extent do the project's activities contribute to the community capacity to manage itself and be able to voice concerns?

To what extent do the project's activities contribute to improved community access to affordable and quality health?

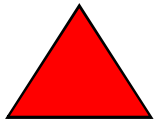
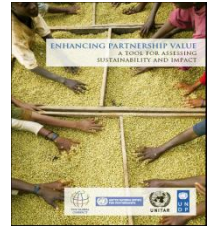
To what extent do the project's activities contribute, promote, or disrupt a community's cultural heritage?

To what extent will the project increase equity for vulnerable groups by providing access to resources and capacity building?

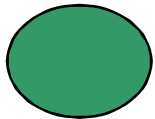


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# Summary Assessment Tool - Ratings



**A red triangle means that something is definitely not looking good, and you shouldn't go ahead with the partnership**



**A green circle means that it is all right to proceed – but that assessment value from the partnership may be far from reaching its potential**



**A yellow star means that what you intend to do is notable and that it might be best practice – a true star quality!**

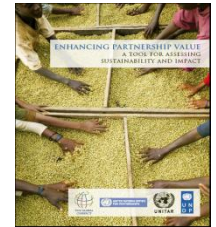
**X**

**Not applicable**



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# Summary Assessment Tool



**Partnership Assessment Tool** United Nations

**Summary Assessment**

Project Name: TestProject  
 UN Partner: UNDP  
 Partnership Manager: UNDP  
 Business Partner: De Beers

Expected start date: Mar 2006  
 Expected end date: Mar 2007  
 Country/Region: India  
 Submitted by: UNPartner

You are now being rated according to the levels you have chosen.

- ▼ A red triangle means that something is definitely not looking good, and you shouldn't go ahead with the partnership.
- A green circle means that it is all right to proceed – but that sizes value from the partnership may be far from reaching its potential.
- ★ A yellow star means that what you intend to do is notable and that it might be best practice – a true star quality!
- Not Applicable

Area	Score
<b>Alignment</b>	
Objectives	●
Value Add	★
Risks	●
<b>Internal Partnership Management</b>	
Governance and Responsibilities	★
Planning, Monitoring and Evaluation	★
Required Resources	●
<b>External Partnership Management</b>	
Transparency	●
Accountability and Stakeholder	★
Self-Sustaining Mechanism	★
Strengthening Linkages	●
<b>Multiplier Effect</b>	
Scalability	●
Replicability	★
<b>Environment</b>	
Biodiversity	●
Efficient and responsible Use of Natural Resources	●
Energy	★
<b>Socio Economic</b>	
Sustainable Livelihoods	
Local Jobs	●
Local Business	★
Local productivity	●
Provision of Accessible Goods	★
Community Development	
Infrastructure	▼
Capacity Building	●
Health and Education	●
Cultural Heritage	▼
Vulnerable Groups	★

Excellent! Your partnership seems to be sustainable and will most likely have a high development value. There is a good chance it could be an inspiration for others to 'walk down'.

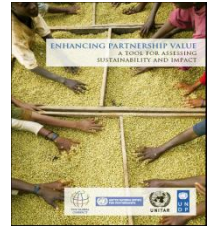
Date:

Overall assessment displayed at bottom of screen



<b>Alignment</b>			
Objectives		●	
Value Added			★
Risks		●	
<b>Internal Partnership Management</b>			
Governance and Responsibilities			★
Planning, Monitoring and Evaluation			★
Required Resources		●	
<b>External Partnership Management</b>			
Transparency			
Accountability and Stakeholder			★
Self-Sustaining Mechanisms			★
Strengthening Linkages		●	
<b>Multiplier Effect</b>			
Scalability		●	
Replicability			★
<b>Environment</b>			
Biodiversity		●	
Efficient and responsible use of Natural Resources		●	
Energy			★
<b>Socio Economic</b>			
Sustainable Livelihoods			
Local Jobs		●	
Local Business			★
Local productivity		●	
Provision of Accessible Goods			★
Community Development			
Infrastructure		▼	
Capacity Building			
Health and Education		●	
Cultural Heritage		▼	
Vulnerable / Marginalized Groups			★

# The overall assessment



"There are serious challenges that should be looked into before proceeding with the partnership"

"You may go ahead with the partnership, but there is definitely still room for improvement"

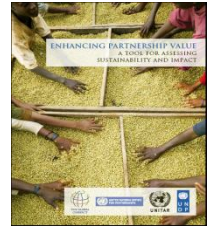
"The partnership is clearly moving in the right direction. You may consider whether there are improvements worthwhile to ensure even higher levels of sustainability"

"Excellent. Your partnership seems to be sustainable and will most likely have a high development value. There is a good chance it could be an inspiration for others - Well done!"



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# Why use the tool?



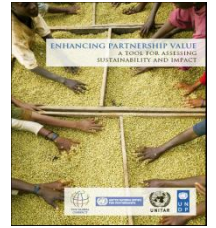
## The PAT contributes to:

- ❑ Informed decision-making
- ❑ Increasing individual partners return-on-investment, and enabling partners to better capitalize on opportunities to add value to partnership projects
- ❑ Aligning and clarifying objectives and responsibilities
- ❑ Systematically articulating and communicating the value of partnership projects
- ❑ Focusing on the long-term economic, environmental and social impacts of the partnership
- ❑ Developing and designing successful partnership projects with positive development effects



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# Enhancing Partnership Value



“Partners – both within the UN and in business – see an opportunity to use more structured and consistent approaches to increase transparency, alignment, sustainability, and ultimately, the impact of their partnerships”

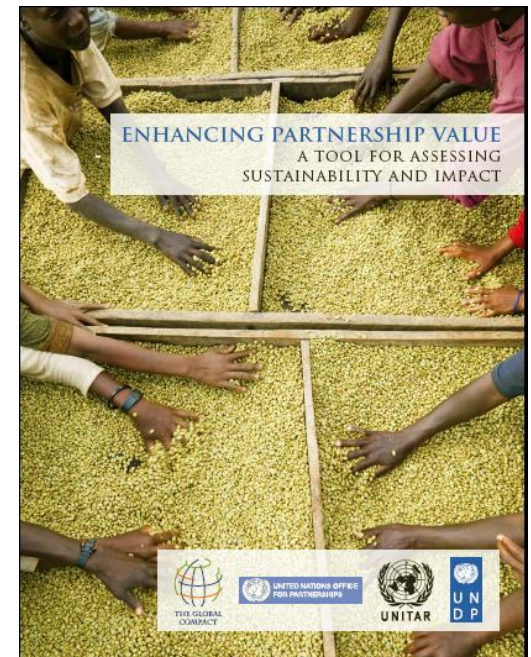
– the Boston Consulting Group

“UNICEF will make the tool and training available to all partnership project managers. UNILEVER believes the toolkit will be a foundation for organizational education and training on brokering and implementing successful partnerships”

- UNICEF and Unilever

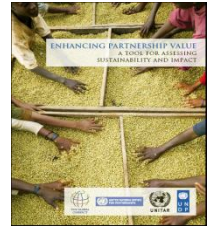
“The UN should play a central role in promoting and using the tool. Use of the PAT could even be set as a requirement for establishing UN partnerships”

- AarhusKarlshamn AB



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# Enhancing Partnership Value



For more information visit  
[www.unglobalcompact.org](http://www.unglobalcompact.org)



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