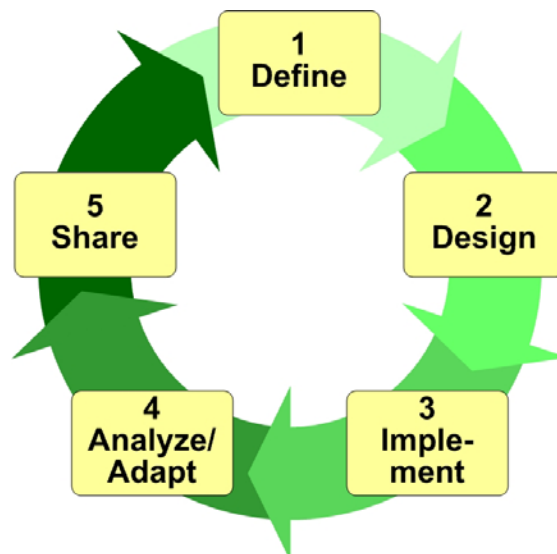**Resources for Implementing the
WWF Project & Programme Standards**

Step 3.4

Partnerships and Partnership Management

April 2007

Step 3.4 Partnerships and Partnership Management

Contents

Partnerships and Partnership Management

What are Partnerships and Partnership Management?

Many conservation projects – and most larger conservation programmes – are carried out by partnerships among people representing different organizations and groups. As such, it is important to have individuals from each of the major partners involved in the project team.

A **partner** can be generally defined as:

> *Any individual, group or institution including governments and donors whose active participation and support are essential for the successful implementation of a project or programme.*

Partners may be internal and external to WWF. For example, your internal partners may include the principal WWF Network players in your project or programme (implementing Programme Offices (POs) or National Offices (NOs), or the principal donor NOs). Your external partners may include other donors, other implementing NGOs in your region, community groups or representatives, and principal government agencies or contacts.

Partnership management is the process of following up on and maintaining effective, productive, and harmonious relationships with partners. It can be as informal as phone calls, e-mails, and social visits or as formal as written, signed agreements that partners review periodically. What is most important is that you invest the time and resources needed to maintain partnerships, you communicate regularly with your partners and you both have the opportunity to assess how things are going.

Why Are Partnerships and Partnership Management Important?

On its own, what WWF – or any organization – can achieve is limited. Working with partners lends WWF projects greater credibility and broadens the scope of what the projects can achieve. In good, effective partnerships, the partnership itself will represent more than the sum of the individual partners. This is particularly important in an organization like WWF, where we often play a leadership role in defining conservation needs and strategies but we may take more of a "background leadership" or "leadership support" role in the implementation process. It is also important in situations where WWF is just one of several players at the table and your team is seeking to have WWF's viewpoints and your project goals incorporated into the broader agenda.

Maintaining effective partnerships is important to ensure that a project stays on track. The success or failure of a conservation project is often not related to its complexity or the strengths and weaknesses of its participants. The success or failure is more often determined by how partners handle project challenges and opportunities. How you manage partners will help you navigate through complex, changing and often unfamiliar terrain.

When to Cultivate Partnerships and Work on Partnership Management

Your team will have developed most of its partnerships in the early define and design phase of the *WWF Standards* (Steps 1 and 2). A key input in identifying your partners is your stakeholder analysis, developed in Step 1.4. Your partners will likely be drawn from this larger pool of stakeholders, but they differ from stakeholders in that they represent a smaller pool of individuals and institutions that need to be directly engaged in the planning and implementation of your project. Over time, however, your project, the context in which in takes place, and/or the partnerships themselves will evolve. Thus, it is important to revisit your partnerships and stakeholder analysis at various points in the planning and implementation process to ensure all key partners are involved and engaged and that it is clear to all involved what is expected of each partner. With this in mind, the *WWF Standards* include attention to partnerships in Step 3 (Implement).

How to Cultivate Partnerships and Work on Partnership Management

How your team cultivates and manages its partnerships will vary greatly by the type of partner and the relationship between your team and that partner. In general, however, cultivating and maintaining partnerships involves three main steps:

1) Establish and review partnerships;
2) Determine governance;
3) Formalize partnerships; and
4) Maintain strong relationships with partners.

Although we present these steps separately, they are often occurring in tandem. Because of the evolving nature of partnerships, it is also likely that you will have to revisit these steps several times over the course of your project.

1) Establish and Review Partnerships

Your team will probably start establishing partnerships in the very early stages of your project development (Define and Design steps in the *WWF Standards*). You, however, may find throughout your project's life that existing partnerships need to evolve or dissolve, while new partnerships need to form.

Ideally, you should determine early on whether and to what extent you will involve prospective partners right from the start. For example, you may do an initial run through Steps 1 and 2 (Define and Design) internally with your WWF team and then repeat those steps more formally with partners. Alternatively, you may be just one of several players at the table seeking to influence the broader group. In this case, you may want to try to take this broader group through a planning process similar to what happens in the Define and Design steps.

Regardless of what approach you take, once you move to Step 3 (Implement), you should review your partnerships and determine whether they are sufficient for your project needs. As a starting point for reviewing existing and establishing new partnerships, you should compare your work plan (Step 3.1) with your stakeholder analysis (Step 1.4) and identify which stakeholders your team should consider

as partners. Remember, your partners might run a range of diversity that includes large international NGOs, small grassroots organizations, local community groups, local and national government agencies, and businesses operating at your site   If you identify any groups that are not currently partners, you will need to formally reach out to them and develop a partnership. You should also determine the most appropriate form and degree of involvement in your project activities. For example, do you need to merely keep local community representatives informed of your project's intent and progress, or do you need to actively engage them in project implementation?

You should build time for reviewing and maintaining partnerships into your work plan and budget and assign responsibilities to project team members. Tasks related to this might include meetings, phone calls, social visits, and drafting of partnership agreements. See Box 1 below for some guidance on elements of effective partner management.

Box 1. Elements of Effective Partner Management

By including key partners in your project team and in all steps of the planning process, you will help to create a framework for guidance and leadership to implement your project, and you will create a sound basis for managing (and monitoring) a partnership of equals that ensures all stakeholders' opinions and needs are respected. The successful engagement and management of partners in your project's implementation can yield great results, but it is a challenging effort. The following are some guiding principles drawn from effective partnerships across the WWF Network:

- **Maximize diversity:** Draw your partners from a diverse mix of entities that may include conservation NGOs, other NGOs, small grassroots organizations, local community members, aid agencies, donors, government agencies, and corporations. Consider partners that multiply your resources, capacity and effectiveness in various ways and are not just sources of revenue; for example .non-conservation NGOs or aid agencies that carry out projects and activities to help meet project objectives and goals.

- **Minimize transaction costs:** Consider that engaging partners and stakeholders often increases the time it takes to plan or carry out work – in developing a common vision and goals, keeping everyone organized, on task and delivering results toward your common vision and goals. Successful implementation requires finding the right balance of good decision making and management among partners without burdening the project with unnecessary structure and bureaucracy.

- **Create multiple roles:** It is often important to have individuals from each of the major stakeholder groups involved in implementation at some level, but it is not necessary to give each the same role. Each partner has its own interests and agenda, and its role in implementation will vary. Partnership management systems need to provide the means to engage each partner at an appropriate and effective level – ranging from simply receiving communications, to an advisory role, to a fully engaged leadership and management role.

- **Plan for transition:** Often leadership shifts during a long-term project, which will be reflected in governance and management of partners. Typically, WWF leads or shares leadership during project development. However, WWF's role often shifts into more of a background role during implementation, as leadership transitions to a government agency or other strategic partner that carries the project forward.

To the extent possible, you should try to make sure some of your partners are what WWF calls "Strategic Conservation Partners" – those partners that exert a major direct or indirect influence on a conservation area or problem, and that through their own behaviour or by influencing other key actors can help the project reach its conservation goals. Some practitioners consider the engagement of one or more *strategic conservation partners* as essential for good conservation design (see <u>WWF-NL Strategic Principles</u>. Strategic conservation partners typically have some or all of the following characteristics:

- Shares a similar long-term vision as WWF;
- An influential player that is or can become part of the solution, either by itself or by influencing other actors in the sector based on their own interests;
- Often from a sector – private or public – that constitutes a major direct threat (or associated with an indirect threat) to conservation;
- Willing to take responsibilities and contribute own resources;
- Willing to sign a formal and long-term relationship with WWF;
- Reliable, transparent and accountable, even if the partner has been part of the problem;

2) Determine Governance

Identifying partners is not enough. You need to be clear about how you will work together to achieve your project goals. For project management purposes, **governance** is the process of decision-making and the process by which decisions are implemented or not implemented. The amount of decision-making authority your team feels is appropriate for your partners will help determine the best governance system for your project. The following are examples of the most common governance systems, organized by the degree of authority and influence partners have over one another. Table 1 summarizes the strengths and weaknesses of each, and Annex A provides more detailed descriptions and examples. Which governance structure you choose will depend, to a certain degree, on the size and complexity of your project or programme.

Case 1: Each organization has no formally agreed authority or influence over other partners

1) **Informal partner management** – These systems involve an informal means of sharing work and communication. They are more common among partners who have worked together for many years and are comfortable with the working relationship.

2) **WWF steering committee** – Typically, a steering committee will be comprised of representatives from WWF offices and a management team (or coordination committee) consisting of government and other partners. The steering committee usually focuses on providing overall governance, approving annual work plans and budgets, and appointing a programme leader. The coordinating committee organizes and supports the work efforts. Over the past decade, WWF steering committees have often been used to manage larger landscape and ecoregion programmes.

Case 2: One or more organizations have partial authority over other partners via agreements

3) **Joint steering committee** (with or without an advisory committee) – This system typically involves a joint steering committee of WWF and other (sometimes all) partners that sets strategic direction, and a separate management team (coordination committee) of core partners that manages work, coordinates partner involvement, and monitors progress.

4) **Independent financial management agency or trust fund** – In this system, a separate organization is used to centralize programme fund raising, financial management and reporting, allocation of funds, and sometimes spending and procurement. Often this organization is an independent environmental fund (or conservation trust fund) created to secure sustainable financing for the programme, or the country or region in which the programme is based. WWF or other key partners may sit on the organization's board of directors, but otherwise the organization is independent and exercises control over the funds and allocation of work via grants or project expenditures.

Case 3: One organization has complete authority over partners
5) **Executing / sub-executing agency** – The executing/sub-executing agency system involves a single oversight agency (the executing agency) that has direct control over decision making, funding and financial management, work assignments and oversight, and monitoring. Top-level executive authority is typically vested in a single NGO, academic or other independent institution, and not in government.

Table 1. Strengths and Weaknesses of Different Governance Systems

Type	Strengths	Weaknesses
1) Informal partner management	• Low transaction costs (time, funds & effort to make joint decisions) • Greatest flexibility	• Little partner accountability • Less pooling of resources & coordination of effort
2) WWF steering committee	• Strategic decisions are made by WWF participants & do not accommodate external partners with different & sometimes conflicting organizational missions • Fair amount of flexibility	• WWF steering committees may not have same authority, leverage or power as participating WWF NOs & POs, sometimes leading to internal conflicts or delayed implementation • External partners may feel their views are not adequately considered • Does not take advantage of external partners' knowledge, experience & resources
3) Joint steering committee (with or without an advisory committee)	• Allows broader group of partners to focus on setting strategic direction (not just the core WWF offices) • Allows all operations & implementation authority – including financial management, allocation, execution, & monitoring – to be centralized in one body • Advisory Committee provides input from broader group of stakeholders who do not directly set policy or manage work (allowing a smaller group of core partners to manage the programme)	• Broader stakeholder group is only involved in annual or bi-annual strategic planning sessions, & may not sufficiently support implementation needs & tasks • Spending & work monitoring authority is centralized in coordinating committee, which could overburden committee, programme coordinator or other staff • Increased time in managing committees, meetings, & communication • Funding & operations pass through increasingly hierarchical structure

Type	Strengths	Weaknesses
		that may be inefficient
4) Independent financial management agency or trust fund	• Creates a level of financial security & transparency separate from government, that is attractive (& sometimes necessary) from the perspective of donors & key partners • Allows for some separation of financial & project management functions from overall setting of strategies, goals, objectives & tasks by the broader group of partners • Focuses attention on the need to raise sustaining sources of capital & operating funds	• May require additional work, staffing & other administrative costs for managing funds & preparing financial & other reports • Requires more inter-organizational meetings & communication (transaction costs) for coordinating work & reporting between partners & the central organization • Partners give up some financial & programmatic independence
5) Executing / sub-executing agency	• Vests authority for work management, financial management & monitoring in one central body, which promotes transparency & accountability • Allows for separation of individual projects, strategies, or geographic areas to sub-agencies directly accountable to the executing agency on specific tasks & results achieved	• Depends heavily on a formalized decision structure within the executing agency for strategic planning implementation & monitoring • Limits broader stakeholder group participation in day-to-day programme management, possibly decreasing stakeholder commitment

Regardless of the governance system that your project chooses, you will want to make sure your system covers three main components:
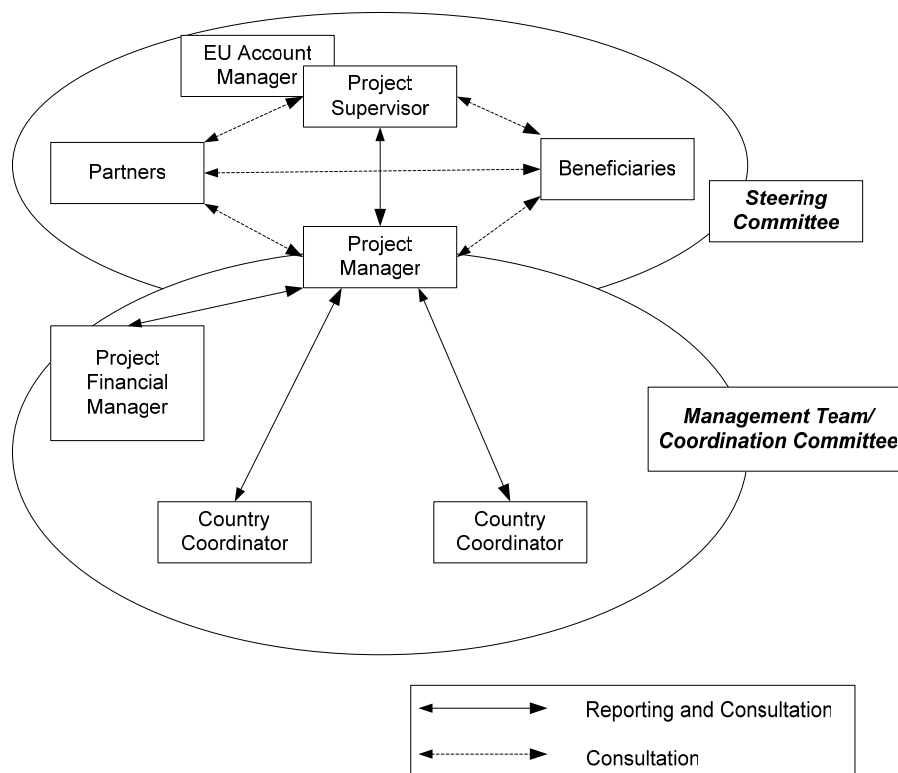   a) Technical management structure;
   b) Financial management and oversight structure; and
   c) Project hosting arrangements.

Technical Management Structure

Your team should make clear what the technical management structure will look like. In general terms, this means identifying roles and responsibilities and reporting lines. In terms of roles and responsibilities, you should refer to Step 1.1 (Team Composition and Operations) and determine if those roles and responsibilities still hold. Now that your project is in the implementation phase, you should use this opportunity to be more specific about who is on your team, who are your formal partners, and what their broad roles and responsibilities are. You should also make sure specific responsibilities are identified in the workplan (Step 3.1).

It is also important not only to lay out roles and responsibilities, but also to specify how different team members relate to one another – reporting and consultation lines. An organigramme, like the one in Figure 1, can be a useful visual tool for depicting those relationships.

Figure 1. Example Organigramme

An important but often overlooked function of the technical management structure relates to reporting. In defining your technical management structure, it will be very important to be clear about what reports you will produce, what technical issues they will cover, who will receive the reports, who will produce the reports, what format the reports will take, and how often your team should submit the reports.

Financial Management and Oversight Structure

Just as it is important to be clear about how your team will implement the technical aspects of your project, it is also important to be clear about how your team will handle financial matters. In particular, you need to make sure the project adheres to all financial and administrative requirements of WWF and the donor(s) supporting your project. Your team will need to be clear about who takes on that responsibility and how it happens. Typically, offices will have a financial department that will handle these matters, but your team will need to interact very closely with this office to make sure that your expenditures match the budget and that you and your partners are following all necessary financial requirements.

As with the technical management structure, reporting is an important function of the financial management and oversight structure. Again, it will be very important to be clear about what reports you will produce, what technical issues they will cover, who will receive the reports, who will produce the reports, what format the reports will take, and how often your team should submit the reports. Because financial matters may be handled by a department external to your project team, it is particularly important to be clear about and agree upon reporting roles, responsibilities, and expectations.

Project Hosting Arrangements

Finally, you will need to make sure you are clear about who is hosting the project and what responsibilities that office or organization will take on. You should consider, for example, who will be responsible for general administrative and financial manners, employment and contracting services, budget and asset management, computer and management information services, and general technical support.

3) Formalize Partnerships

Multi-partner projects or programmes require agreements or systems to effectively manage the engagement of different partners to implement strategies. Partner management agreements are a range of tools – from contracts, grants or bilateral funding agreements to less formal Memoranda of Understanding (MOUs), Programme Implementation Agreements (PIAs), or charters – that you can use to secure your key partners' commitment and long-term involvement in your project or programme. The larger and more complex your programme, the more partners you will likely have, and the more detailed your agreements will be.

Engaging partners in the planning process, while sometimes challenging and time consuming, is relatively easy compared to keeping your partners committed and actively engaged during implementation. Studies of partnership work suggest that relationships between organisations are less likely to encounter irreconcilable differences if the parties concerned establish a comprehensive agreement about how they intend to co-operate. We recommend that you begin the implementation of your programme with some sort of written agreement such as a charter or letter of intent with your partners upon which you can later build.

The range of typical partner management agreements includes:
   a) Informal agreements between two or more partners to work together;
   b) Project or programme protocols (or charters);
   c) Memoranda of understanding (MOUs);
   d) WWF programme implementation agreements (PIAs)
   e) Legal Contracts, Grants, Bi-Lateral Funding Agreements & Other Funding Agreements

In some cases, you may use multiple agreements for one partner. For example, you may start off with an informal agreement established through a letter of intent. As the project progresses, you may establish an MOU with the partner. Later in the project, you may provide the partner with a grant or a contract to carry out specific work related to t he project.

This resource guide presents an introduction and overview of these agreements. There are also examples of some of these agreements located within the WWF Standards on Connect (see Table 2).

a) Informal Agreements

Informal agreements may include an exchange of letters to signify a commitment to work together towards a mutual goal and/or an intent to collaborate. They are relatively easy to develop and set the stage for possible further negotiations among your partners.

b) Project/Programme Protocols (or Charters)

A protocol (also sometimes called a programme charter) can help partners come together initially to begin planning and managing a project. The protocol might include general language reflecting the need to work together and how to work together on developing common strategies, shared resources, and responsibility for results.

c) Memoranda of Understanding

A Memorandum of Understanding (MOU) is a more formal, signed agreement between an NO or PO and one or more of its partners. MOUs are quite common within WWF and the broader NGO community. An MOU is basically the end result of a discussion or negotiation between you and another key partner or partners involved in your project. An MOU can range from a general agreement to cooperate to a more comprehensive document of mutual staff commitment and other resources. An MOU may include additional details related to the cooperative management and implementation of your programme – for example, your partner governance and communications systems.

MOUs serve an important function in securing a commitment of two or more partners to work together on a project or programme. Importantly, however, MOUs are not a substitute for a grant, contract or other bi-lateral funding agreement between a donor or donor NO and the implementing PO or partner, as they are generally not used for the transfer of funds. Because each MOU is unique, there is no formal process or standardized checklist for how to execute an MOU. As a starting point though, readers are encouraged to review the MOU template linked in Table 2 below.

d) WWF Programme Implementation Agreements

Programme Implementation Agreements (PIAs) are an internal, standardized WWF management document (used exclusively within WWF) that are growing in usage across the Network..

The WWF Network defines PIAs as "brief agreements to record the timeline, funding, and nature of contributions of donors and recipient offices where more than one NO is investing in the field." In short, the purpose of PIAs is to define and better coordinate donations and involvement of various donor NOs with the implementing field POs and NOs. This helps prevent unproductive competition among field offices, and limit uncoordinated directions and requirements from multiple NOs.

WWF-International Operations team has developed a PIA Checklist to ensure each PIA contains the following elements:
- Overview (or preamble) describing the overall vision, goals, and strategy of the programme;
- Programme and funding description, including commitments by key donors and NOs;
- Operations or implementation description, including partner roles and responsibilities;
- Provisions concerning planning, decision making, communications and coordination;
- Provisions for monitoring and evaluation of the programme and reporting requirements.

The process of negotiating and executing a PIA among the various NOs and POs can be complex and time consuming, but it is critical to future effectiveness and efficiency. Some examples of signed PIAs are already available, and several programmes have drafts in progress. Global Operations staff at WWF-International can assist you with ideas and guidance on negotiating and securing a PIA.

e) Legal Contracts, Grants, Bi-Lateral Funding Agreements & Other Funding Agreements

WWF entities often execute legal contracts as part of a condition of granting funding or authorizing work, both within WWF and with outside entities such as other NGOs. WWF-International and various WWF NOs have considerable expertise in contract writing and authorization. For basic guidance on writing and executing contracts, start by visiting Connect (Contracts).

Funding agreements are formal documents with specific spending, activities, results, and reporting obligations spelled out. Such formal agreements have provisions that address organizational safeguards, primary donor requirements if applicable, and transfer of funds to support activities or pay for services to accomplish identified results. For examples and assistance in executing formal agreements, you should seek the help of the legal or operations staff in your country office, who are most familiar with your country's laws regarding contracts and other legal instruments.

Assistance with Partner Management Agreements

Many of the partner management agreements discussed above are generally legally binding. You should work closely with legal, contracts, and accounting staff in your office or NO to ensure your agreements comply with applicable legal frameworks and internal procedures.

WWF operations and legal staff have considerable experience in negotiating, structuring and monitoring performance of partner management agreements, and they can provide you with examples, including templates and guidelines. Many of these are available within the Network Operations Standards on Connect.

Table 2 provides a quick reference for when it is appropriate to use each type of partner management agreement.

Table 2. Partner Management Agreements at a Glance

Agreement Type	Description	Templates/Examples
Informal Agreements	May include an exchange of letters to signify a commitment to work together towards a mutual goal and/or an intent to collaborate. Are relatively easy to develop and set the stage for possible further negotiations among your partners.	Letter of Commitment Template (very simple example)
Project/ Programme Protocols	Useful as a means by which your partners come together initially to begin planning and managing your programme. Might include general language reflecting the need to work together and how to work together on developing common strategies, shared resources, and responsibility for results.	Partnership Agreement Tool in the Partnership Toolbox (example)
Memoranda of Understanding	A more formal, signed agreement between an NO or PO and one or more of its partners. Quite common within WWF and the broader NGO community. Basically the end result of a discussion or negotiation between you and another key partner or partners involved in your programme.	MOU Template
Programme Implementation Agreements	Standardized WWF management documents that define and better coordinate donations and involvement of various donor NOs with the implementing field POs and NOs. Specifically, they record the timeline, funding, and nature of contributions of donors and recipient offices where more than one NO is investing in the field.	PIA Checklist Examples
Grants, Contracts, & Other Formal Funding Agreements	Formal documents with specific spending, activities, results, and reporting obligations spelled out.	For WWF intra-network contracting standards and WWF consultancy contract standard see (Contracts). Examples of external contracts are also available from WWF-Int.

4) Maintain Strong Relationships with Partners

Finally, while cultivating initial partnerships and formalizing them is an important step, you should not stop there. You should actively manage your partnerships throughout the life of your project. This includes maintaining frequent communication with them and formally or informally checking in with one another to evaluate whether you all parties are satisfied with the partnership. The Relationships Audit Tool in Annex B might be a useful tool for helping you and your partners examine your partnerhip. Over time partners who collaborate and communicate well together come to trust each other; this usually leads to each partner giving the other more freedom to take action.

References

Partnership Toolbox, WWF-UK Organisation Development
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WWF-NL Strategic Principles, "Towards Effective Conservation Strategies". AIDEnvironment, prepared for WWF.
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Annex A. Examples of Partner Management and Governance Systems

The following section provides examples of five types of effective partner management systems which vary by the type of authority and influence partners have over one another. As described in the main body of this guide, common partnership management systems include:

Case 1: Each organization has no formally agreed authority or influence over other partners:
1) Informal partner management
2) WWF steering committee

Case 2: One or more organizations have partial authority over other partners via agreements:
3) Joint steering committee (with or without an advisory committee)
4) Independent financial management agency or trust fund

Case 3: One organization has complete authority over partners:
5) Executing / sub-executing agency

1) Informal Partner Management

Bering Sea Ecoregion
The Nature Conservancy (TNC) and WWF jointly developed a 10-year Bering Sea Ecoregion strategic plan as a foundation for a broader, longer-term conservation planning process that will include multiple NGO and government partners. Currently the WWF Bering Sea programme team manages relationships with TNC and other partners without the use of a formal governance system. Partnerships with US and Russian government agencies, local community organizations, and private fisheries and shipping companies are effectively managed through bilateral relationships.

Galapagos Ecoregion
The WWF Galapagos programme has coordinated long-term partnerships with many partners including Galapagos National Park and Marine Reserve, the Charles Darwin Foundation research center, Toyota, The Nature Conservancy, and Conservation International. The programme has successfully worked with this group of government, non-profit and private companies using fairly informal communication and sharing that has provided the partners flexibility and expediency.

2) WWF Steering Committee

Amur-Heilong

Steering Committee	
Members	• Representatives from each WWF entity with sustained involvement in region (WWF Germany, WWF Netherlands, etc.) • Representatives from each WWF executing office (Russia, China Program Offices) • Representatives from Global Programs and TRAFFIC • WWF International representative

	• Ecoregion leader (rotated between China & Russia) serves as secretary to committee
Meets	Annually and as needed
Responsibilities	• Provides overall governance to programme • Approves annual work plans and budgets • Appoints ecoregion leader

Mangement Team/Coordination Committee

Members	• Deputy chairs of governments/municipalities of Russian Federation in Amur River basin • Leaders of basin authorities (water and water transport authorities, Ministry of Natural Resources of Russia, etc.) • Representative from Interregional Association of Economic Relationships of Russian Federation • One representative from the scientific and public sectors of the Science-Society Council of the Coordination Committee
Meets	As needed
Responsibilities	• Coordinates actions between state and local govts, NGOs, and industries • Assesses quality and applicability of science developments • Develops conservation recommendations for local communities • Forms Work Group that prepares meetings and formalizes decisions • Forms Science-Society Council that provides organizational and informational support

3) Joint Steering Committee

Nepal Terai Arc Landscape (TAL)

Joint Steering Committee

Members	• Representatives of all programme implementation (NGO) partners • Representatives of major donor organizations • Representatives of all engaged government agencies • Representatives of other key partners operating in TAL • Chair (Chief of Planning, Nepal Dept of Forests and Soil) • Staffed by TAL Landscape Coordinator (full time employee)
Meets	Annually and as needed
Responsibilities	• Sets strategic direction and overall policies • Oversees and conducts annual joint planning of programme work • Approves annual budget and work plans • Enables or empowers work of coordination committee and members • Integrates partner spending and progress reports • Facilitates partner communication and engagement of new partners • Requires accountability and results, and presents regular progress reports

Management Team/Coordination Committee

Members	• Core partners, perhaps drawn from programme planning team

	• Key support staff as needed (fund raising, communication, administrative, IT, HR, M&E, accounting, and grant management) • Staffed by, and possibly chaired by, TAL Landscape Coordinator
Meets	As needed (more often than annually)
Responsibilities	• Coordinates work of partners • Hires and oversees programme staff • Raises funds • Advises Steering Committee how to allocate and monitor funds • Develops annual work plans and budgets • Sets, carries out, and monitors field implementation projects and activities • Makes grants and disburses funds • Tracks programme and financial performance, and measure results • Presents progress reports, proposed management decisions, and proposed new partners to Steering Committee

Advisory Committee (optional)

Members	• Landscape Coordinator (FTE) • Members of programme planning team and other partners as needed • Representatives of implementing field agencies at local or regional level • Independent scientists and technical staff as needed
Meets	As needed
Responsibilities	• Advises the Steering Committee and Coordinating Committee as needed • Provides technical advice for the programme • Engages the broader set of stakeholders for input, and to share or interpret progress • Reviews proposals and budgets for Steering Committee approval • Supports efforts to monitor and evaluate programme status

4) Independent Financial Management Agency or Trust Fund

Amazon Region Protected Areas Programme (ARPA)

The ARPA programme has several key partners including the Brazilian Ministry of the Environment and the Brazilian Park Service, WWF and other NGOs, the World Bank and other key donors, and an independent trust fund FUNBIO. FUNBIO plays a major role in centralizing both fund raising and financial management functions, as well as in sharing programme management.

FUNBIO has significant financial, programmatic and legal responsibilities: securing new sources of sustainable financial to support the 67 ARPA protected areas; centralized procurement of all goods and services needed for the 67 PAs (generally, the government has shifted all PA financial procurement to FUNBIO); and creating and managing an endowment fund to support the long-term recurring costs of managing the PAs.

In practice, FUNBIO is responsible for: raising funds, managing money raised including investment of endowment funds, allocating funds via grants, contracts and direct expenditures, managing all procurement of goods and services, tracking both financial and programmatic performance,

maintaining financial controls including grant and contract compliance, and preparing financial reports for partners, donors and stakeholders.

5) Executing/ Sub-Executing Agency

Cape Action for People and the Environment (CAPE) Programme

The South African National Biodiversity Institute (SANBI) acts as the executing agency for the entire CAPE programme. SANBI's Cape Coordination Unit (CCU) is responsible for work organization, program development, monitoring and evaluation, and communications.

The CCU contracts specific projects and activities to four sub-executing agencies: Western Cape Nature Conservation Board; South African National Parks; the Wilderness Foundation; and Rhodes University.

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)							