



**UNEG**  
United Nations Evaluation Group

Strategy  
Document

# UNEG Partnership Strategy

The UNEG Partnership Strategy was finalized and published following the UNEG Annual General Meeting in Rome in May 2018.

It was prepared by the UNEG Partnership Working Group, established under Strategic Objective 4 of the UNEG Strategy 2014-2019.

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## Acronyms

ALNAP	Active Learning Network for Accountability and Performance in Humanitarian Action
DAC	Development Assistance Committee
ECG	Evaluation Cooperation Group
IOCE	International Organization for Cooperation in Evaluation
OECD	Organisation for Economic Cooperation and Development
SDG	Sustainable Development Goal
UN	United Nations
UNEG	United Nations Evaluation Group

## Introduction

1. Evaluation is emerging as a profession and the demand for evaluation is growing. The changing global landscape and demands means there is a larger need for broader participation of civil societies, governments, academia, United Nations (UN) agencies, financial institutions and the private sector to engage in monitoring, assessing progress and decision-making in development initiatives both nationally and internationally.

2. Partnerships, as a means, have never before in the history of international cooperation been more critical. Intensive global engagement brings together governments, the private sector, civil society, the UN system and other actors. Mobilizing and utilizing all available resources is required to transform the world into a better place by 2030.<sup>1</sup> The Sustainable Development Goals (SDGs) also highlight the importance of partnerships – SDG 17: Partnerships for the goals,<sup>2</sup> and is of relevance to the United Nations Evaluation Group (UNEG) and its Members.<sup>3</sup>

*“To successfully implement the 2030 Agenda for Sustainable Development, we must swiftly move from commitments to action. To do that, we need strong, inclusive and integrated partnerships at all levels”*

UN Secretary General Ban Ki-moon

3. With the adoption of the UNEG Strategy 2014-2019,<sup>4</sup> UNEG decided to engage more with the evaluation community outside the UN system in order to “benefit from and contribute to an enhanced global evaluation profession.”

4. As part of Strategic Objective 4,<sup>5</sup> UNEG contributes to the international evaluation community by sharing its knowledge, engaging in norm-setting and providing a venue for exchange among experts and practitioners, with the intention to enhance the evaluation profession globally. Such a goal is better served by long-term engagement with like-minded partners responsible for building or contributing to the effective functioning of national evaluation systems.

5. Building on its work to develop effective partnerships over recent years (see Appendix 1), UNEG intends to deepen its approaches to partnerships. In this regard, partnerships are a means rather than an end in itself and, hence, are cross-cutting across all UNEG Strategic Objectives.

6. This Partnership Strategy is guided by the *UNEG Strategy 2014-2019* (2015), the *UNEG Principles of Working Together* (2015)<sup>6</sup> and the *UNEG’s Principles for Stakeholder Engagement* (2017)<sup>7</sup>. Inputs from surveys,<sup>8</sup> discussions and document reviews also facilitated the development of this strategy.

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<sup>1</sup> UN (2015). Partnerships for Sustainable Development Goals: A legacy review towards realizing the 2030 Agenda. Available at <https://sustainabledevelopment.un.org/sdinaction/publication/partnerships-a-legacy-review>.

<sup>2</sup> <https://www.un.org/sustainabledevelopment/globalpartnerships/>

<sup>3</sup> UNEG is a voluntary professional network that brings together units responsible for evaluation in the UN system, which includes UN departments, specialized agencies, funds and programmes, and affiliated organizations.

<sup>4</sup> The UNEG Strategy 2014-2019 was finalized and published in April 2013. It was updated in May 2015 and is accessible at [www.unevaluation.org/UNEG\\_Strategy\\_2014-2019](http://www.unevaluation.org/UNEG_Strategy_2014-2019).

<sup>5</sup> UNEG Programme of Work 2017-2018 ([www.unevaluation.org/workprogramme2017\\_2018](http://www.unevaluation.org/workprogramme2017_2018)).

<sup>6</sup> [www.unevaluation.org/UNEG\\_Principles\\_of\\_Working\\_Together\\_2015](http://www.unevaluation.org/UNEG_Principles_of_Working_Together_2015).

<sup>7</sup> [www.unevaluation.org/UNEG\\_Principles\\_for\\_Stakeholder\\_Engagement\\_2017](http://www.unevaluation.org/UNEG_Principles_for_Stakeholder_Engagement_2017).

<sup>8</sup> Surveys were conducted among UNEG Heads, and current and potential partners.

# Purpose, Objectives and Scope of the Strategy

## Definition of partnership

7. For the purpose of this strategy, partnership is defined as:

A collaborative relationship and/ or a strategic alliance between UNEG and an external entity to work towards mutually agreed objectives with a shared understanding of roles and responsibilities based on the comparative advantage of each entity

## Purpose

8. The main purpose of this strategy is to foster external partnerships that contribute to the achievement of UNEG’s objectives, mission and vision with greater impact.

## Objectives

9. The objective of the strategy is to guide UNEG members when selecting, prioritizing, establishing and successfully managing partnerships to achieve shared goals in the world of evaluation.

## Scope

10. This strategy outlines the procedure for UNEG to engage in system-wide partnerships. It also provides a framework for scaling-up partnerships established by individual agencies.

11. The duration of a partnership can vary – short-term or long-term. UNEG’s role in the partnership could be instrumental, facilitative or operational. The nature and scope of the partnership have to be based on the specific comparative advantage of UNEG and the partner(s) involved in achieving the shared goal.

12. While fostering partnerships is a cross cutting element of UNEG’s Strategic Objectives, it should be kept in mind that not all external partnerships will be associated with UNEG directly. It will depend on the activity carried out, and UNEG members could establish many of these partnerships individually or in collaboration with another member at the agency level. There are already agency-level partnerships between UNEG members, and between a UNEG member and external partners. An assessment of these partnerships would determine any value added to UNEG to building on these already established partnerships on a case by case basis.

13. For many UNEG members, partnerships are not a new concept. Most evaluation policies refer to partners as internal and external stakeholders for both accountability and learning. A number of them also envisage establishing “core learning partnerships” by bringing together representatives from the organizations themselves, governments and other organizations participating in the initiatives being

evaluated to enhance credibility and ownership of the evaluation.<sup>9</sup> These agency-level partnerships should not be confused with UNEG (network) partnership.

14. UNEG could, however, provide a forum/platform to discuss these partnerships and facilitate how members can leverage synergies and/or benefit from these partnerships, where feasible. UNEG could act as a catalyst and play a convening role in connecting stakeholders (internal and external) or promote joint evaluation activities to be undertaken by agencies while facilitating partnerships with external entities (e.g. country-level SDG-based or United Nations Development Assistance Framework [UNDAF] evaluations).

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<sup>9</sup> UNEG (2016). Evaluation in the SDG era: Lessons, Challenges and Opportunities for UNEG. Available at [www.unevaluation.org/Evaluation\\_SDG\\_era](http://www.unevaluation.org/Evaluation_SDG_era).

## Approach to UNEG Partnership

15. UNEG, while defining the need for partnership, should not only contemplate what the partnership can achieve as a whole, but also the potential concrete benefits for both UNEG and its members. The approach presents forms and types of partnerships in which UNEG could engage.

### Forms of Partnerships

16. The following are the most likely forms of partnerships that UNEG may enter into. These range from collaboration (weakest/simplest), to cost-sharing and strategic alliances (strongest).

- a. Collaboration – These are organizational partnerships for sharing knowledge and information, and coordinating efforts. However, organizations operate with greater autonomy and with no permanent organizational commitment (e.g. existing partnerships with the Evaluation Cooperation Group [ECG] and Active Learning Network for Accountability and Performance in Humanitarian Action [ALNAP]). There is no shared governance, resources or programmes.
- b. Cost-sharing alliances – These partnerships occur when one partner provides certain resources and the other brings different ones. For example, one brings technical knowledge and the other provides funding. It is important to note that both partners have shared benefits and costs. Examples could include donor agency funding for UNEG activities in evaluation capacity development or normative work, or development of guidance/standards to develop national evaluation policies.
- c. Strategic alliance – These are partnerships where partners have shared decision-making power and there is joint programming. Partners manage a programme (set of activities) of mutual interest to achieve shared goals and respective organizational missions. Examples include peer reviews, joint research on methodologies, normative standards and meta-evaluations on one or more SDGs. Roles and responsibilities are agreed upon in strategic alliances. Some cost-sharing alliances could mature into strategic alliances.

### Types of Partner

17. It is vital for UNEG to ensure that partnerships are strategic, whether it is for promoting norms and standards, sharing knowledge and information, learning, capacity development, use of evaluation and innovation in evaluative thinking.

18. When selecting a partner, UNEG must ensure that it is with a reputable institution/network. The type of partner would largely depend on the strategic purpose or the need identified. This strategy does not cover UNEG Observers.<sup>10</sup> Examples of potential type of partners, based on the surveys conducted, include:

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<sup>10</sup> A UNEG partner is not a UNEG observer. A UNEG observer is an evaluation unit or unit in charge of evaluation within a UN entity that does not meet all the criteria for UNEG membership. A UNEG observer may be invited to participate in UNEG activities including Working Groups or Task Forces but does not hold any voting rights. On

- Umbrella organizations (e.g. the Organisation for Economic Cooperation and Development [OECD]/ Development Assistance Committee [DAC], International Organization for Cooperation in Evaluation [IOCE], ECG);
- Network coalitions (e.g. ALNAP);
- Regional or international evaluation associations (e.g. European Evaluation Society [EES], African Evaluation Association [AfrEA], American Evaluation Association [AEA], Canadian Evaluation Society [CES], Australasian Evaluation Society [AES], the UK Evaluation Society [UKES], International Development Evaluation Association [IDEAS]);
- Academia (universities)/research institutions/global think tanks;
- Intergovernmental and other international organizations (e.g. the Green Climate Fund [GCF], Council of Europe);
- Global or regional training institutions (e.g. the International Program for Development Evaluation Training [IPDET], Centres for Learning on Evaluation and Results [CLEAR]);
- Governments (donor countries, emerging economies and developing countries);
- Foundations;
- Private sector (e.g. impact investment community).

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the other hand, a UNEG partner is an organization/institution outside the UN system with whom UNEG collaborates for a specific activity to achieve a specific purpose contributing to the overall UNEG Strategy. A UNEG partner may be invited to participate in the UNEG Annual General Meeting (AGM) and/or Evaluation Practice Exchanges (EPEs) but cannot participate in the work of the Working Groups or Task Forces.

# Principles and Criteria

## Guiding Principles

19. The UNEG partnership strategy is underpinned by the following guiding principles that should be applied whenever UNEG is considering entering into a new partnership or alliance, or reviewing an existing partnership.

- a. Ensure transparency while at the same time avoiding conflict of interest.
- b. UNEG should preserve its neutral and impartial role in partnerships.
- c. Ensure there is inclusive engagement.
- d. New partnerships should be based on the comparative advantages of each partner.
- e. Recognize, understand and allow differences in cultures/practices that exist in partners/organizations.
- f. Trust is an essential ingredient. Ensure equal status among all partners, in addition to developing and maintaining trust.
- g. The nature and role of UNEG in a partnership (e.g. leader, facilitator or participant) should be determined by the nature and relevance of inputs and services to be provided.
- h. A partnership should lead to a clear and mutually beneficial added value with regard to results pertinent to shared goals and objectives.
- i. A partnership should serve as a means for greater effectiveness in the “evaluation world” in terms of evaluation norms and standards, capacity development, professionalization, use/utilization, innovation, evaluative thinking and culture in line with UNEG’s vision, mission and strategic objectives.

### Success Factors for Partnership

- Fully committed and engaged partner organizations (not few individuals).
- Active commitment to ensuring benefits and value addition for partners.
- Learning culture in day-to-day operations and capacity building.
- Genuine respect and increased trust between different players (partners).
- Ensure there is sufficient clarity on roles, responsibility and working arrangements.
- Have a strategic impact over and above the local success factors.
- Leadership.

Source: Summarized from Tennyson, Hurel and Sykes (2002); Funnel (2006); and Sanginga (2006).

20. The guiding principles are subject to revision as necessary.
21. The core values of effective partnerships include *respect, genuine commitment, patience, persistence and transparency*.<sup>11</sup>

## Criteria

22. The following criteria should be considered in identifying partners:
- a. Partnerships should be strategic:<sup>12</sup>
    - Partnerships should directly contribute to the Strategic Objectives and/or strategic focus areas identified by UNEG.
  - b. The partner is a network or an institution involved in one or more of the following:
    - conducting/managing evaluations;
    - promoting innovative evaluation thinking and approaches;
    - contributing (or potentially contributing) to furthering:
      - evaluation culture
      - evaluation capacity development
      - utilization or use of evaluation
      - professionalization of evaluation
  - c. The partner is a recognized institution or network. This includes satisfactory assessment on:
    - governance and control (e.g. governance, internal control, ethics);
    - ability to deliver (e.g. past performance, staff capacity).
  - d. The partnership with the institution/network satisfies the following principles:
    - UNEG's independence, impartiality, credibility and integrity;
    - ensuring no unfair advantage is awarded to the partner;
    - transparency.
  - e. There is senior-level commitment for the partnership:
    - there is a mutual will to pursue a common goal (indicated by willingness to share/contribute resources and commitment of senior management);

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<sup>11</sup> KPMG (2015). Unlocking the Power of Partnerships. Available at <https://assets.kpmg.com/content/dam/kpmg/pdf/2016/01/unlocking-power-of-partnership.pdf>.

<sup>12</sup> In some instances, an opportunistic partnership may be pursued.

- there is a top-level commitment (in the partner organization) for the use of evaluation, building evaluation culture and professionalization of evaluation within the organization first and then globally/regionally.

f. There is a comparative advantage in partnering (leading to greater effectiveness).

23. The criteria should be used to vet the overall merit of the partnership; however, the requirements may be adjusted based on the form of partnership and type of partners. The principles and criteria should guide the engagement and development of partnerships.

## Purpose of Partnerships

24. Partnerships should preferably be strategic, but that does not mean they cannot be opportunistic. The purpose of partnerships, although distinct yet interlinked, could broadly include those presented in the list below. This list is based on insights from UNEG surveys, discussions and review of UNEG documents.

Purpose of Partnership	Examples of Activities
Enhance knowledge sharing and facilitate national evaluation capacity development	<ul style="list-style-type: none"> <li>✓ Organize events/sessions at evaluation conferences</li> <li>✓ Support platforms for dissemination of knowledge and good practices</li> </ul>
Create a policy environment that increasingly values evaluation as a key element of relevance and effectiveness	<ul style="list-style-type: none"> <li>✓ Support awareness raising at different levels (national, regional, global)</li> </ul>
Provide leadership on evaluation	<ul style="list-style-type: none"> <li>✓ Enhance the visibility of evaluations in relevant fora and events</li> <li>✓ Promote the use of UNEG Norms and Standards</li> </ul>
Promote evaluation culture	<ul style="list-style-type: none"> <li>✓ Share experiences and good practices in stakeholder engagement</li> </ul>
Advance the professionalization of evaluation	<ul style="list-style-type: none"> <li>✓ Update and promote evaluation competencies relevant to the contemporary global context</li> <li>✓ Develop curricula for national evaluation capacity development with academia/training institutes</li> </ul>
Seek opportunities to bring innovation into evaluation	<ul style="list-style-type: none"> <li>✓ Organize study groups to develop innovative methodologies</li> </ul>

25. Appendix 2 provides examples of possible partnerships and their purpose (perceived benefits), based on survey results.

## Partnership Development and Governance

26. A crucial aspect to ensure the successful implementation of this strategy is to have a clear decision-making mechanism and governance structure within UNEG on partnership. All UNEG members should be aware of the partnerships entered into by UNEG and the purpose of the partnership. Having a governance mechanism ensures inclusiveness, transparency and accountability.

27. To facilitate the implementation of the strategy, UNEG should start with a “light” mechanism to identify/reassess and work with partners to fulfil strategic objectives, as follows:

- a. The conveners of the UNEG Working Groups/Task Forces<sup>13</sup> will identify partners as required, including institutions/networks with whom the Working Groups are currently engaged. The criteria for identifying/assessing partners discussed in this strategy (refer to Appendix 3) should be used in selecting or continuing with institutions/networks for engagement.
- b. An engagement plan should be prepared for each partnership by the Working Group/Task Force convener proposing the partnership, indicating the general purpose and a broad description of activities proposed, resource implications, lead contact/champion, indicative timeframe and expected results (including its contribution to the UNEG Strategy). Refer to Appendix 4 for a template of the engagement plan.
- c. The engagement plan should be reviewed by the UNEG Secretariat and circulated to UNEG Heads for endorsement.
- d. Based on the agreed engagement plan, a letter of engagement should be prepared and duly signed by UNEG and each external partner. This letter of engagement should indicate the purpose, timeframe, roles and responsibilities, results to be achieved and an exit clause for the partnership.
- e. The convener of the Working Group should report to UNEG members (e.g. at the Annual General Meeting) on the partnership’s progress and results.

28. Support for reviewing engagement plans and preparing partnership agreements should come from the UNEG Secretariat.<sup>14</sup> From the UNEG side, the UNEG Chair and the Executive Coordinator (or the UNEG Fund Manager) should sign the partnership agreement.<sup>15</sup> From the partner side, a person in a position to take the responsibility for implementation of the plan should sign the agreement.

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<sup>13</sup> For long-term partnerships with multiple purposes that are not confined to the work of one Working Group or Task Force, a lead person could be selected separately to play this role on a case-by-case basis.

<sup>14</sup> This may be reconsidered in line with the revision of the Secretariat arrangement.

<sup>15</sup> This should be discussed and resolved as part of UNEG’s larger governance issue as to who can sign and speak on behalf of UNEG, as technically UNEG is a professional volunteer network and not a “legal” entity.

29. UNEG should assess the implementation of the strategy, following the piloting of the mechanism above.

#### **Checklist for Partnership Development**

- ✓ Establish a clear and strategic reason (need) for the partnership (essential for identifying the right partner).
- ✓ Champions and/or strong leaders for the cause are crucial. The person leading the partnership should be empowered and recognized by respective organizations (partners).
- ✓ Goals set should be simple and credible to ensure shared understanding. Be flexible in defining the success. The purpose of the partnership should be clear.
- ✓ Recognize, understand and allow differences in cultures/practices in partners/organizations.
- ✓ Ensure ownership and management/senior level commitment in the partner organizations. This can be verified by the actual resources and cost commitment/investment for the partnership.
- ✓ Ensure equal status among all partners, in addition to developing and maintaining trust.
- ✓ Make sure there is sufficient clarity on roles, responsibilities and working arrangements, and hold each partner accountable.
- ✓ Procedures and protocols for decision-making, governance and communicating with other stakeholders during the partnerships should be established.
- ✓ Assess, monitor and manage partnerships, including performance management for sustainability and success.
- ✓ Have an exit strategy. Learn the “art of exit” and prepare to let go. Every partnership must eventually consider the merits of transitioning and ending. Some partnerships will have to renew shared goals and commitments while others may end altogether.

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- OECD (<http://www.oecd.org/about/>)
- Water Supply and Sanitation Collaborative Council (<http://wsscc.org/collaboration/collaboration-overview/>)

## Appendix 1: Current Partners and Perceived Benefits

Current institutional partners include: the Organisation for Economic Cooperation and Development (OECD) Development Assistance Committee (DAC) Network on Development Evaluation (EvalNet); the Evaluation Cooperation Group (ECG); the International Organization for Cooperation in Evaluation (IOCE); the Active Learning Network for Accountability and Performance in Humanitarian Action (ALNAP); and the Water Supply and Sanitation Collaborative Council (WSSCC). The perceived benefits from the current partnerships (presented below) have been taken into account in defining scope and purpose of future partnerships.

No	Perceived Benefits by UNEG	Perceived Benefits by Current Partners†
1	✓ Learning and knowledge sharing	✓ Facilitated engagement with UN system organizations (IOCE, ALNAP, OECD/DAC)
2	<ul style="list-style-type: none"> <li>✓ Promotion and use of UNEG Norms and Standards</li> <li>✓ More engagement with organizations outside the UN</li> </ul>	<ul style="list-style-type: none"> <li>✓ Promotion of sound evaluation norms and standards (OECD/DAC, ALNAP)</li> <li>✓ Greater outreach with evaluation community (IOCE, ALNAP)</li> </ul>
3	<ul style="list-style-type: none"> <li>✓ Access to additional resources</li> <li>✓ Opportunities to engage in partnerships for joint evaluations of SDGs</li> </ul>	<ul style="list-style-type: none"> <li>✓ Better positioning in the international development arena (IOCE)</li> </ul>
4	<ul style="list-style-type: none"> <li>✓ Great visibility</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increased access to quality evaluation knowledge (IOCE, ALNAP)</li> <li>✓ Supporting and promoting the professionalization of evaluation (IOCE, OECD/DAC)</li> </ul>
5	<ul style="list-style-type: none"> <li>✓ Conducting joint evaluation capacity development activities</li> </ul>	<ul style="list-style-type: none"> <li>✓ Facilitated conduct of joint evaluations with UN system organizations (ALNAP, OECD/DAC)</li> <li>✓ Strengthening national evaluation capacity (IOCE)</li> </ul>

Survey responded by 30 UNEG Heads and three partners (ALNAP, IOCE and OECD/DAC).

Note: The number (column 1) indicates the perceived ranking.

Source: Summary findings from surveys conducted with UNEG Heads and current partners (2018).

## Appendix 2: Examples of Potential Partners and Purpose

SO	Examples of possible activities/ outputs	Potential partners	Partner with
1	Joint evaluations and joint capacity development programmes	Governments, civil society foundations, academia/research institutions	UNEG Members
	Exchange of knowledge and good practice in evaluation (e.g. Community of Practice, Evaluation Practice Exchange)	Umbrella organizations and networks (ALNAP, ECG, IOCE, OECD/DAC), academia (learning partner), global think tanks, civil society	UNEG/UNEG Members
	Peer reviews	OECD/DAC, governments <sup>†</sup>	UNEG
	Foster professionalization of evaluation	Umbrella organizations and networks, international/regional evaluation societies (EES, AfrEA, AEA, UKES, CES, AES) <sup>††</sup> , governments, foundations, academia, private sector	UNEG/UNEG Members
2	Support use of evaluation in programme design, planning, oversight and management	Governments, civil society, private sector	UNEG Members
	Support the use of evaluation results for learning	Governments, umbrella organizations and networks (ALNAP, ECG, OECD/DAC), civil society academia, private sector	UNEG/ UNEG Members
3	Support engagement in SDG evaluations	Governments, civil society, private sector, global think tanks (3ie, ODI) <sup>†††</sup>	UNEG/ UNEG Members
	Provide technical and methodological advice on UN-wide policy initiatives (QCPR, UNSWAP, IASC and UNDAF) <sup>††††</sup>	Governments	UNEG/ UNEG Members
	Technical knowledge of humanitarian evaluations developed and shared	ALNAP, academia/global think tanks	UNEG/ UNEG Members
	Applying principles of culturally responsive evaluation in evaluation practice	Governments, umbrella organizations and networks (OECD/DAC, ECG, ALNAP)	UNEG/ UNEG Members

<sup>†</sup> Compiled from UNEG Strategy 2014-2019 and UNEG Detailed programme of work 2017-2018.

<sup>††</sup> AEA – American Evaluation Association; AES- Australasian Evaluation Society; AfrEA – African Evaluation Association; CES – Canadian Evaluation Society; EES – European Evaluation Society; UKES – the UK Evaluation Society.

<sup>‡</sup> In the peer reviews, currently conducted with OECD/DAC, involving developing country governments may be considered. It would not only facilitate a two-way perspective but also enhance the institutional capacity of participating countries. Also, many emerging economies are becoming donors.

<sup>†††</sup> 3ie – International Initiative for Impact Evaluation; ODI – Overseas Development Institute.

<sup>††††</sup> QCPR - Quadrennial Comprehensive Policy Review; UNSWAP - United Nations System-Wide Action Plan; IASC – Inter-agency Standing Committee; UNDAF – United Nations Development Assistance Framework.

Note: IOCE includes EvalPartners.

## Appendix 3: Partnership Identification Checklist

Name/ description of potential partner:		
Criteria	Meet the criteria (Yes/ No)	Comments
Meets UNEG agreed list of purpose of partnerships		
It is a recognized institution or network (global, regional or national), and has: <ul style="list-style-type: none"> <li>- governance and control</li> <li>- ability to deliver</li> </ul>		
It is responsible for/committed to: <ul style="list-style-type: none"> <li>- conducting/managing evaluations</li> <li>- promoting innovative evaluation thinking and approaches</li> <li>- furthering evaluation culture/capacity development</li> <li>- professionalization of evaluation function</li> <li>- use/utilization of evaluation</li> </ul>		
It satisfies UNEG principles of independence, impartiality, credibility and integrity		
There is a senior-level commitment from the partner		
There is a willingness to commit resources (in-kind and/or financial)		
There is a lead person identified for the partnership from within UNEG		
The partnership directly contributes to Strategic Objective results and/or activities		
There is a comparative advantage to partner with this institution or network (cost-effectiveness, etc.)		
There is no unfair advantage awarded to this partner		

## Appendix 4: Template for Engagement Plan

1. Name and description of the partner:
2. Proposed by: (a convener or a lead person):
3. Counterpart lead person (name and position):
4. Purpose of the partnership, and how it contributes to UNEG objectives:
5. The comparative advantage of the partner - why this partner (include short background on past engagement if applicable):
6. Proposed activities for the partnership and expected results:
7. Indicative time frame:
8. Possible resource implications for UNEG and its Members:
9. Additional comments/remarks (e.g. risk/mitigation measures, alternative options)

Note: Engagement Plan to be prepared for new partnerships or with major change in the scope of existing partnerships.

## Appendix 5: Points for Consideration when Preparing a Partnership Agreement

Who?

- Partner organizations (UNEG and \_\_\_\_\_)
- Partner representatives and their status (in their respective organizations)

When?

- Timelines
- Milestones

What?

- Proposed objectives
- Proposed activities
- Outline of work plan (if relevant)
- Resource commitments (from UNEG and partner)
- Roles and responsibilities
- Performance indicators

How?

- Decision-making process/procedures
- Governance
- Funding arrangements
- Risk management (measures to mitigate risks including staff/lead person turnover)
- Metrics for monitoring partnership performance
- Review process (partnership health check)

Communications

- Procedures for ongoing communications (between partners)
- Rules of branding
- Rules of the public profile of the partnership
- Confidentiality rules (if applicable)
- Protocols for communicating with other stakeholders

Others

- Mechanism to resolve difference (if necessary)
- Provision to add/drop partners to the existing partnership (if applicable)
- Exit strategy for the partnership as a whole

Note: The final agreement may cover most or all of the points mentioned above.

Source: Adapted from the United Nations Development Programme's (UNDP's) Guide to Partnership Building (2010)