

## **Lisbon minus 3: Evaluating CSR partnerships**

This toolbox contains three kind of instruments that will be helpful to better understand the evaluation process and tools set up for the European project "Lisbon minus 3: Evaluating CSR partnerships".

The first kind of information comes from the **synthesis and conclusions** of a previous European project "Not Alone. A research on successful partnerships between private companies and citizens' organizations in Europe", developed from July 2005 to June 2006 by Active Citizenship Network and FONDACA, supported by the European Commission, DG Employment and Social Affairs, and by Unicredit Group and Enel SpA. It was aimed, on the one hand, at filling the existing gap in knowledge on cooperation between citizens' organizations and companies in developing corporate social responsibility (CSR) activities; and, on the other, at identifying, on the basis of existing good practices, guidelines for the development of partnerships in Europe.

The second one comes from the **guidelines** for good CSR partnerships in Europe, defined as conclusions of the project in question.

The third one comes from the **tools** set up for the current project "Lisbon minus 3: Evaluating CSR partnerships" and is made up of three specific instruments: THE MATRIX FOR THE EVALUATION OF PARTNERSHIPS (TOOL B), the GUIDELINES FOR THE EVALUATION PROCESS (TOOL A) and THE EVALUATION OUTPUT: LESSON LEARNED & FUTURE COMMITMENTS (TOOL D).

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# **1. Summary of results and conclusions<sup>1</sup>**

## The research

The project- implemented from July 2005 to June 2006 by Active Citizenship Network and FONDACA, with the support of 8 ACN partner organizations - was aimed at analyzing 36 successful partnerships between ACOs (Autonomous Citizens Organizations) and private companies in 9 European Union countries (Austria, Cyprus, Germany, Hungary, Italy, Malta, Poland, Slovenia, United Kingdom), with a view to improving the knowledge on this tool, of great importance for promoting CSR. The research was conducted through a questionnaire filled by one company (COM) and one autonomous citizens organization (ACO) representative for each partnership. For the purpose of this research, partnerships have been defined as "situations in which civic organizations and companies share objectives, resources, responsibilities and risks, to achieve public interest goals".

## Dissonance on facts and opinions

According to the factual dissonance index (which refers to differences in the partners' answers when it is implicit that they should be the same), the fact that 44.4% of the partnerships had a medium or high level of dissonance must be seriously considered. According to the cognitive dissonance index (which refers to questions for which one would expect that the partners' answers should be similar), it results that in 61.1% of the partnerships there was a medium or high level of cognitive gap.

## The projects promoted

As for the projects and activities carried out by the partnerships, more than 50% of them concerned welfare and the environment, while one out of four addressed the empowerment of young people. Though the projects were usually multi-level, the national level was the preferred one (76.1% of the partnerships), while less than half of the partnership also involved regional and local levels. Worth mentioning was the minor involvement of the European level in partnerships (12.7%), confirming its weakness with respect to CSR. Almost 60% of all the implemented projects were medium or long-term. As for the budget, about two thirds of them had either a very small budget (< 50,000 €, 33.9%) or a very big one (> 500,000 €, 29.0%).

As for the actors responsible for the project, they were, above all, the marketing (23.8%) and communication (26.2%) units for companies, while in ACOs they were the entire organization (25.6%) and the project unit (30.2%); in companies, CSR units were involved as well (19% of the partnerships), while in ACOs, only in 7% of the cases. As for the resources, companies invested in the projects a median of 200,000 €, while citizens' organizations spent 17,500 €; both parties invested a similar number of employees (3 is the median for companies, 2 for ACOs), but ACOs engaged a median of 11 volunteers and companies 6; invested in-kind resources were primarily logistical (40.5% of the responses), operational (27%), marketing and PR (21.6%), goods and products (10.8%). In more than two thirds of the cases, there were other investors: among them, there were other citizens' organizations (58.7%), public bodies (45.7%), other companies (39.1%) and individual donors (6.5%).

## The basis of partnerships

91.7% of the companies involved in the partnerships had a CSR strategy, while only 61.1% of ACOs had one. Similarly, 94.4% of the company respondents stated that the partnership was

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<sup>1</sup> ACN, FONDACA (July 2006), *Not Alone. A research on successful partnerships between private companies and citizens' organizations in Europe*, supported by the European Commission DG Employment Social Affairs and Equal Opportunities, Rome, pp: 54-66. From [http://www.activecitizenship.net/documenti/Report\\_CSR\\_Final2.pdf](http://www.activecitizenship.net/documenti/Report_CSR_Final2.pdf).

part of their CSR strategy, while only 72.7% of ACO representatives stated this. 30.6% of the companies and only 19.4% of civic organizations were first-timers in partnering. 35 partnerships out of 36 were examined at the top management level.

As for the actors involved, they were usually only two. Civic umbrella organizations (30% of the cases) and business networks (23.2%) were mentioned as well. According to 85.9% of the respondents, no intermediaries and external third parties intervened or played any role in establishing partnerships. 50.7% of the respondents stated that the actors had cooperated before initiating the partnership. The previous cooperation was primarily medium (44.4%) or long-term (40.7%). According to 90.3% of the people interviewed, there had been no conflicts or difficult relations before the partnership.

Most of the respondents (97.2%) stated that the reasons for partnering were mainly internal, with only 56.5% saying that they were external. Both parties felt that the most important internal reason for partnering was resolving community problems as part of their mission (37.3% of the companies, 40.4% of ACOs); while funding was very important for citizens' organizations (26.9% of the respondents), implementing a CSR strategy (21.6%) and reputation (19.6%) were important for companies. The main external reasons for companies were image (22.7% of the respondents) and meeting public needs (18.2%), while for ACOs these were public needs (32%) and government regulations and legal requirements (16% for them and 13.6% for companies). For both actors the occasion of special years and awards (18.2% for companies, 12% for citizens' organizations) were quite important. According to 92.9% of the respondents (with no difference between the two groups) an agenda of common priorities had been defined during the planning phase. Around two thirds of the respondents stated that this agenda had been jointly decided, while for 25.8% of the company respondents and 21.2% of ACO respondents it had been the result of an ACO proposal.

Conflicts over the definition of a common agenda took place according to 29.4% of the company respondents and 12.1% of citizens' organization respondents. These situations were managed through discussions, meetings, communication, improvement of mutual knowledge and definition of agreements.

As for the expected results and benefits generated by the partnerships, the most important issues, for both groups, were: meet citizens' needs (37.5% COM, 27.5% ACO), enhance reputation and image (19.6% COM, 13% ACO) and increase competencies (8.9% COM, 10.1% ACO); moreover, while the improvement of CSR awareness (8.9%) was important for companies, the strengthening of networking opportunities (13%) was for citizens' organizations.

More than 40% of all of the respondents reported that both actors facilitated the partnerships. The rest stated that each actor upheld its own enabling function to the detriment of the other; this as an element of the dissonance recurrent in partnerships. About one third of the respondents identified senior management as the facilitator for both actors. Communication and PR units played a significant facilitating role as well, with project units also playing one, especially in citizens' organizations.

Both companies (31% of the respondents) and citizens' organizations (41.2%) also recognized senior management's representative role in partnerships. PR and communication units (31% for COM, 19.6% for ACO) and project managers and specific units (23.8% for COM, 19.6% for ACO) were important as well.

In terms of resources invested by the partners, more than 80% of the actors stated that they invested human resources (a median of 1.50 for companies and 2.00 for ACOs); 58.3% of the companies and 24.2% of citizens' organizations invested financial resources (a median of 150,000 € and 17,500 € respectively), 38.9% COM and 28.6% ACO invested in-kind resources, and 19.4% of the companies and 25.7% of citizens' organizations other resources. In-kind resources were primarily logistical, operational, products, marketing, PR and advertising, while the "other" resources were knowledge and reputation.

### The management of partnerships

With reference to the structure of the partnerships, the form mentioned the most by the interviewees were: stable relationship (55.6% for COM, 50% for ACO), temporary association (25% for both), forum with a mission (11.1% for COM, 22.2% for ACO) and, finally, convergent separate identities (5.6% and 2.6% respectively); thus highlighting a typology of structure which reflects the nature of partnerships as something that goes beyond the individual actors, and which is aimed at creating a stable relationship. This kind of structure is characterized by flexibility, whether it be either informal (36.1% for companies, 33.3% for citizens' organizations) or formal (58.3% and 63.9% respectively).

Most of the respondents (86.1%) stated that the rights and responsibilities of partners had been defined.

Their definition were the result of the following two approaches: one based on technical and juridical tools, such as contracts, reporting systems, steering committees (71.4% for companies, 70.3% for ACOs); the other on cultural and communicational processes, such as discussions, trust and openness, recognition of purpose and partner's independence (28.6% and 29.6% respectively).

84.4% of the company and 75.8% of citizens' organization respondents stated that there was equality in the distribution of roles. The difference between the two groups was a result of the greater management burden on citizens' organizations highlighted by ACO respondents.

Transparency and accountability within the partnership were guaranteed through formal tools, such as reports, contracts, meetings (66% of the companies, 57.7% of citizens' organizations), as well as informal tools (34% and 42.3% respectively). Both parties agreed which were the three single most important tools: reports, contracts, and communication.

According to 79.1% of the company respondents and 66.7% of ACO respondents, the decisions concerning the partnership were taken together, in a more or less formal manner.

With respect to the participation of the intended beneficiaries in the partnership decision making process, 43.7% of the respondents (38.9% of the companies, 48.6% of ACOs) stated that beneficiaries were involved, while the rest said that they were not. However, even when beneficiaries were involved in decision making, often it was simply to ask them about their needs or to give them some sort of feedback; only in a very few cases were they directly involved in the project (20% and 21.4% of company and ACO respondents stated that beneficiaries were involved).

Almost 85% of all of the respondents declared that the real responsibility for the success or failure of the partnership was shared. Senior management was directly responsible for the success of the partnership, with communication and PR officers sharing some of the responsibilities.

Questions were also posed on both internal and external communication aspects. As for internal communication, a widespread use of a number of tools, both formal (written reports, letters, meetings) and informal (e-mails, phone calls), emerged. Tools involving personal relations (54.8% for companies, 55.6% for citizens' organizations) were used more than those linked to interpersonal relations (40.2% and 41.2% respectively). According to the respondents, meetings, phone calls and emails were the most useful tools. The reasons mentioned for this were: quick and direct communication (37.4%), clear information (15.5%), facilitation of discussion (11.6%), overview of the situation (11.6%). The main external communication tools were press conferences, web pages, specific events and social and sustainability reports, which, incidentally, were at the bottom of the ranking, despite their supposed importance for CSR. 60.9% of the mentioned tools were specific ones, and only 39.1% were general external communication tools.

As for the evaluation of partnerships, 62% of the respondents declared that no indicators had been defined. When they had, the main contents of the indicators were: success of the project carried out (62.5%); quality of the partnership, achievement of its goals and effectiveness of partners (50.1%); impact on each partner (25.0%); cost-benefit relation (16.7%). 27.8% of the company respondents and 44.4% of ACO representatives said that no evaluation had been carried out (the gap in answers is probably linked to the fact that some companies conducted the evaluation on their own). In any case, 63.9% of the respondents stated that an evaluation of the partnership had been implemented or at least planned (ongoing for 81.6% and ex-post for 18.4% of the respondents; internal to the partnership in 44.1% of the cases, external in 20.3% and internal to each participant in 35.6%).

### Evolution of partnerships

Two thirds of the partnerships were started with no hesitations or worries on the part of the actors involved. The remaining one third had worried about: selecting the right partner, not having the right competencies, possible internal resistances, fear of losing control, the risk of economic dependence of civic organizations, distrust and disagreement over objectives. In particular, ACOs hesitated because of the possible divergent aims with business (social vs. economic), while businesses somewhat mistrusted civic organizations.

These worries were handled, in two thirds of the cases, through informal relationships (meetings, communication, building trust, openness, working closely together, networking) and in the remaining cases, through formal tools (improving rules, supporting the partners' fund raising, internal solutions, creating specific teams, etc.). Companies tended to prefer informal tools (70.6% vs. 55.6% of ACOs), while citizens' organizations preferred to adopt a practical approach (44.4% vs. 29.4% of companies).

In the beginning of the partnerships, almost one third of the partners had some difficulties in understanding each other. These difficulties can be grouped in two main clusters: managing differences in culture, languages and focus (77.3% of the interviewees who answered the question) and divergences in methods and managerial aspects (31.8% of the interviewees who answered the question). These difficulties were dealt with through discussions, open dialogue, pragmatic adaptation and acknowledgement of partners' identity.

Civic organizations and businesses described the evolution of partnerships in a positive manner: relationships expanded and improved over time. Only a few of them stated that relations were stable or got worse (positive: 80.4% for companies and 88.5% for ACOs; stable: 4.3% and 2.3%; negative: 15.3% and 9.2%).

According to 47.2% of interviewees the main changes took place during the activities of the partnerships: 73.5% of people who answered the question mentioned that activities had expanded while 17.6% maintain that they had been adapted to changes in the context. Respectively 18.1% and 11.1% of the interviewees stated that some changes concerned partnerships' structure and objectives. These smaller changes in the structure and objectives could mean, however, that the partnerships were being strengthened.

As for the obstacles during the partnership, 40.3% of the interviewees stated that a number of obstacles had been faced during the partnership, but only few of them were directly linked to the partnership itself, such as partner behavior, different culture and languages, conflicting expectations, lack of prompt communication. Once again, the partners dealt with these problems through a direct and open approach, by both improving the relationship and by strengthening internal management and competencies. In 2 cases, the relationship ended because of problems, which had existed from the very beginning.

It seems that obstacles faced in the beginning and during the partnership rarely created conflicts (8.3% of the interviewees).

13.9% of the interviewees declared that there were other conflicts inside the partnership (concerning disappointment in members, competition between partners, conflicting visions,

lack of respect), as well as outside (primarily with public administrations and other companies).

### Partnerships' effects

30.6% of the interviewees felt that their initial expectations had been attained to a greater degree than they had expected, while 62.5% said that they had been attained. Only 5.6% stated that their expectations had been attained to a lesser degree than they had expected, while 1.4% declared that they had not been attained. The results of the partnerships can be divided in three groups:

- Outputs: 25.2% of the interviewees stated that materials (reports, press articles) and events (press conferences) were delivered, attracting much media attention.
- Benefits: according to 40.8% of the people interviewed, there were mutual benefits (development of mutual trust, enhanced reputation and credibility, improvement of relations); 59.0% stated that there were internal benefits (improvement of efficiency and effectiveness of products and services, organizational innovation, increased access to resources and better access to information), while 9.2% of the interviewees referred to other kinds of benefits (carrying out their mission, winning an award, acquiring knowledge, increasing public relations, benefits for employees).
- Competencies: they were mentioned by 47.2% of the interviewees. New competencies were linked to partnerships (44.5% of the interviewees who answered the question) or to operational skills (55.5% of the interviewees who answered the question).

As for the impacts (unexpected and greater results), 72.2% of the people interviewed said that they were positive. These impacts were identified as: long-term relations, networking, project extension or continuation, reputation and image, gains for the community, know-how, better internal climate, capacity building. In other words, the primary unexpected impacts concerned the creation of a stable relationship between partners and networking. Moreover, companies noticed more a positive gain in reputation, while civic organizations observed more the actual gains for the community as a result of partnerships and networking. The (few) negative impacts which were mentioned were: partnerships not achieving their objectives; civic organizations losing credibility; erosion of mutual trust; lack of support.

All the interviewees, except for one, believed that partnerships were valid tools to tackle certain issues.

In particular, 82% of them declared that partnerships created relational advantages (35.8%), which in turn contributed to reaching objectives that companies/civic organizations would not be able to on their own, or produced a number of operational advantages, such as increasing their own effectiveness (25%) and resources (9.5%) or improving their own know-how and expertise (11.9). Partnerships, moreover, were considered by 65.2% of the interviewees as tools that influenced or contributed to promoting the Corporate Social Responsibility of the different actors that were involved. In particular, through partnerships, they learned how to actually manage these kinds of relationships and fully grasp their potential for their own CSR strategy (24%).

### Partnerships' Profile

The projects developed through the partnerships were primarily:

- aimed at tackling welfare and environmental concerns, as well as promoting the empowerment of young people;
- developed at the national, less at the local, and not at the European level;
- medium or long term;
- managed by marketing departments or public relations offices (for companies) and by the entire organization (for ACOs);
- either of a value of less than 50,000 or more than 500,000 €
- supported by other investors.

In general, partnerships are:

- between companies that have a CSR strategy and ACOs that are more focused on promoting concrete gains for the communities, and which have the main common goal to resolving societal problems;
- stable and flexible relationships between one company and one organization, that have already engaged in previous collaborations and which have been started with neither the participation of second-degree structures, nor the support of external intermediaries;
- equal relationships, where rights and responsibilities are defined and decision making process, as well as responsibilities are shared, but where ACOs face more internal obstacles in partnering with business;
- relations guaranteed by formal technical and juridical tools and managed with a high level of personal relations;
- characterized, on the one hand, by internal communication tools which imply more personal rather than interpersonal relations and, on the other, by external tools, which are primarily specific rather than general (as social reports);
- with a minor involvement of the intended beneficiaries in the decision making process;
- more about human rather than financial resources invested by both sides;
- decided and represented by senior management;
- facilitated by both partners' communication or public relations departments;
- evaluated more by companies, often separately;
- positively evolving relationships - with no significant obstacles or conflicts - which are managed through communication and mutual recognition;
- relationships that create more internal and less mutual benefits, increase competencies (relational and operational) and generate many unexpected positive impacts, primarily linked to strengthening partners' cooperation.

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The research conducted for this study allows us to put forward some general conclusive remarks. Naturally, these remarks can be applied only to the partnerships examined for this work and their reliability rests upon the value and limits of this research, as defined in the introductory part of this report.

The conclusions address the following five points: study of the partnerships, essential features of the 36 partnerships being analyzed, actors' participation in the partnerships, role of the partnerships as a corporate social responsibility "technology", elements of ambiguity and of risk which emerged from the analysis.

### Study of the Partnerships

The partnerships proved to have a rich empirical content, which was hardly in correspondence with the modeling exercises that are usually carried out on this matter. An example of this is the negligible role that social and sustainability reports have had as accountability tools of partnerships. This research can, therefore, also have implications for developing further research activities on partnerships between citizens' organizations and private companies. From this work it might be possible to bring a benefit for existing models as well, making them more realistic and effective.

With reference to the starting point of the research, the partnerships that were analyzed emerged as a phenomenon, which is clearly different from other forms of relations (such as dialogue and collaboration) between ACOs and private companies. The main difference resides in the fact that partnerships entail sharing resources and risks in carrying out programs and activities together. This was clearly pointed out by most of the key informants, who stated that it was thanks to partnerships that they were able to do something that they would not have been able to do on their own. The title of this report, "Not Alone", reflects this very important result.

Moreover, the study of the 36 partnerships also revealed a number of significant difficulties and obstacles. The following two problems can be considered the most important ones.

The first problem concerned the existence of divergent perceptions and assessments of the facts between the two groups of actors, which meant that it was not easy to find out exactly what really happened.

This specific problem was handled by making it a matter for further research, highlighting the actors' divergent or convergent information and visions, and then measuring their divergences. This type of focus allowed us to enrich the body of information gathered on the partnerships, and it could also represent a warning for practitioners and policy makers, when promoting or dealing with partnerships.

The second problem referred to the overlapping and confusion that existed between the projects or activities carried out by the partnerships and the partnerships themselves. In this case, as well, it was decided to make the problem visible, by gathering information both on the projects and on the partnerships, thus making it possible to conduct a separate analysis of the two elements. It must be pointed out, however, that the interviewees showed a sufficient degree of awareness of the difference, though some confusion occasionally emerged. In this case, also, the matter should be taken into account not only when studying, but also when planning and implementing partnerships.

### Essentials of Partnerships

A number of significant and recurrent elements allow us to identify some characterizing (or structural) features of the 36 successful partnerships, which were examined. Let us summarize them in the following points:

- *At the core business.* Partnerships are understood and managed as something that is related to the core business of the actors' organizations and not as something marginal or of secondary importance. It means that partnerships seem to be perceived as something linked to the very identity of the actors, capable of adding or subtracting value to it. This is the reason why, in our opinion, the top management was fully involved, both in starting and in facilitating the partnership; the evaluation of the partnership was usually not assigned to external actors; there was a reluctance to expand the relationship to other actors (though this can happen).
- *Coming from previous relations.* Partnerships were borne out of a framework of mutual knowledge that preceded the decision to partnering.
- *Not yet an ordinary activity.* Partnerships were apparently not yet considered a normal and ordinary operational practice for the actors. This is indicated both by the prevailing use of ad hoc communication tools and by the incidence of internal problems.
- *Flexibility, formality and personal relations.* Flexibility seemed to be the main management approach for the partnerships. It is linked to the prevailing formal technical and juridical tools, which confirm the strategic value that partnerships have. At the same time, however, communication and cultural processes, as well as personal relations, were also very important.
- *Trend towards equality.* The partnerships were jointly designed and managed, thus guaranteeing equality between partners. ACOs had a leadership role in defining the priorities of the common activities.
- *Investment of human rather than financial resources.* Partnerships seemed to require a significant investment, primarily (and in all cases) in human, rather than in financial resources. This kind of investment is, in a sense, much more strategic both for companies and citizens' organizations.
- *Long-term, stable relationship.* The partnerships tended to evolve into stable relationships, changing in actors and in activities rather than in structure and objectives. In other words, they overcame the actors' individual identities, producing what can be defined as an "Alchemy Effect".



- *Added value and incremental character.* Most of the partnerships were recognized as capable of bringing value to the actors' activity, image and identity, as well as generating unexpected results, with reference both to the partners and their activities. It can be stated that partnerships had an incremental character and, therefore, tend to grow thanks to their own development.

### Actors of the partnership

Citizens' organizations seemed to be more accustomed to partnering with companies, but were more cautious in deciding to partner with companies, than companies were with them: in other words, ACOs were more used to participating in partnerships, but not with companies. They seemed to be more satisfied by the partnering experience, probably because of their low level of expectations and initial concerns, such as loss of identity, risk of becoming dependent and divergence with company objectives.

Partners revealed different intentions and expectations, though within a framework of clear and common general aims. Companies tended to partner with the goal to put into practice their corporate social responsibility strategy and enhance their reputation, while citizens' organizations were more focused on the possibility to increase their resources and achieve concrete results in the field they were engaged in. ACOs showed also a low awareness of what were the corporate social responsibility implications of the partnership.

As for the management of the partnership, ACOs tended to involve, in addition to its top management, their entire organization, while businesses preferred to primarily utilize specific units (such as communication).

During the partnership, a mutual learning process seemed to take place. It concerned management skills for ACOs and skills linked to the project for companies. As a result, both learned about each other's differences in terms of culture, language, etc.

The research also seemed to confirm the marginal role played by second-degree structures, whether they be of companies or of citizens' organizations. Again, it can be said that partnerships emerged as something too important to "be left" to anyone else.

Finally, government and public administration appeared to play a marginal role, one of financial support rather than of facilitation or enablement.

### Partnerships as CSR "technologies"

At this point it would be appropriate to identify partnerships as specific "technologies" capable of contributing to the implementation of corporate social responsibility goals of both companies and their civic stakeholders.

From this point of view, partnerships emerged as instruments capable of linking companies and stakeholders in a framework of common rights and duties, powers and responsibilities, leadership and management roles. Partnerships can be viewed as experiences capable of generating a significant impact inside companies and on their reputation, and of enriching their identity as a result of implemented social objectives, thus increasing their value.

On the stakeholders' side, as well, partnerships seemed to be tools which allowed them to enhance the awareness of their role and their ability to interact with companies, as well as improve their general attitude towards business by overcoming prejudices and "prevailing views" and constructively challenge companies to take corporate social responsibility seriously.

### Ambiguities and risks

Last but not least, very little information was gathered about the possible conflicts within the actors' organizations, as well as between them and outside the partnership themselves.

Despite the fact that the partnerships had been selected on the basis of their success, key informants may have been somewhat reluctant on this point. If the information had been directly collected, it would have been possible to find out more on this matter, and maybe acquire some interesting data.

People interviewed stated that there was full equality between the partners. Apart from some exceptions, they recognized the existence of unbalanced responsibilities and powers only when ACOs had a major role in the implementation of common activities. Further situations of unequal division of power could have been verified only by conducting a more in depth research.

The situation which raised the greatest concern was, probably, the lack of involvement of the intended beneficiaries in the decision making process of the partnerships. Apart from specific cases (for example, a program on wildlife), the fact that most of the partnerships did not involve the beneficiaries of their activity in the decision making, or did it in a very limited manner, clearly had negative implications.

This is something that could, indeed, raise serious doubts about the alleged innovative character of partnerships. An explanation of this phenomenon could be that the presence of a citizen- based organization may have been considered by both partners as an indirect element of representation of the intended beneficiaries' voice and needs. Whatever the reason, this element could be an indicator of the risk of partnerships turning out to be too self-serving.

The risk of a prevailing sense of self-sufficiency and, therefore, of a self-referential attitude of partnerships, has to be closely evaluated. Apparently it is risk which is intrinsic to the "core business" character of the partnerships which were examined for this study; therefore, something that cannot be avoided, but which has to be dealt with during the partnership activity.

It is, thus, something that the partnering actors, in particular, must carefully take into consideration, in order not to contradict the very reason why partnerships themselves are established and carried out.

## **2. Guidelines for good CSR partnerships in Europe<sup>2</sup>**

The objective of the present guidelines is to highlight what the actors of the partnerships consider as keys for success, on the basis of their concrete experience in partnership building and management. These guidelines are not meant to be one of the many existing handbooks on "How to create a successful partnership" but are just aimed at giving a few simple indications on the principal building blocks needed to establish effective partnerships, based on the concrete experiences of 36 private companies and 36 citizens' organizations in 8 European countries.

They actually draw on the analysis of the answers that the company and civic organization representatives who were interviewed gave to the last question of the questionnaire: "*From your experience, taking into account the potential factors that may enhance or impede partnerships, what recommendations would you give for building future partnerships?*". They also take into account the contributions of the over 150 participants (mainly private companies, citizens' organizations from all the EU and candidate countries, scholars, institutions) in the VI Frascati International Seminar on CSR (June 30<sup>th</sup> -July 1<sup>st</sup> 2006), in which the project results were presented.

These guidelines are part of an ongoing process and can be modified, as well as further improved. They shall be enriched in the near future with new experiences of partnership in other EU and candidate countries, in order to enhance their European significance and develop the specifications for each of the main recommendations, which emerged from the survey.

With respect to the framework of recommendations, the guidelines deal with 4 phases of the partnership:

- the bases or pre-conditions for establishing a partnership;
- the building of the partnership;
- the management of the partnership;
- the evaluation of the partnership.

### Partnership bases

In order to make a partnership work, two kinds of pre-conditions must be met: relational and operational ones.

#### *Relational bases*

The relational bases of the partnership refer to the knowledge/awareness that future partners have of themselves, of their future partner(s), as well as of their approach to a possible partnership. It emerged as one of the main concerns of both companies and civic organizations, since 56 of the 204 recommendations had to do with this aspect of the partnership, and more specifically they were:

- transparency and integrity, especially with respect to all the partner's interests and expectations (20 mentions);
- mutual trust and respect (18 mentions);
- compatibility between the partners' visions and values (9 mentions);
- enthusiasm and trust in achieving the goals (5 mentions);
- awareness of the partners regarding their own profile (2 mentions);
- not too high expectations (1 mention);
- reliability (1 mention).

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<sup>2</sup> ACN, FONDACA (July 2006), *Not Alone. A research on successful partnerships between private companies and citizens' organizations in Europe*, supported by the European Commission DG Employment Social Affairs and Equal Opportunities, Rome, pp: 67-74. From [http://www.activecitizenship.net/documenti/Report\\_CSR\\_Final2.pdf](http://www.activecitizenship.net/documenti/Report_CSR_Final2.pdf).

One can notice, first of all, that the interviewees' mentions were concentrated on a limited number of items, indicating a strong agreement on the key pre-conditions for the success of the partnership.

*Transparency and integrity* appear to be the most essential relational prerequisite, especially for civic organizations, given that 15 out of the 20 mentions came from this side. It is, therefore, essential that both partners clearly state what they expect from the partnership and what their specific interests are (which may coincide only in part with the partners' common interests) before starting building the relation. In this fashion, the parties will have all the elements to decide whether their agreement is sufficiently strong and they will be able to clearly define the common objectives of the partnership. At this stage, it is quite important to avoid misunderstandings and disappointments during the development of the partnership.

*Mutual trust and respect* are another key principle, which was reaffirmed by all the participants in the conference.

The prejudices and stereotypes, which civic organizations and private companies often have towards each other are actually one of the main obstacles to the building of partnerships. It is interesting to highlight the fact that 13 out of the 18 mentions were made by private companies, which may suggest that, in general, businesses trust and respect less than civic organizations do.

*Compatibility between the partners' visions and values* is also mentioned by both categories as an important element. Several participants in the Frascati seminar also underlined the central character of this element, while others stated that partnerships allow actors with different world visions to work together on common goals.

The compatibility of the partners' values undoubtedly facilitates the definition of shared objectives, as well as the agreement on the means to reach them.

However, different values do not necessarily mean that the partnership has no future, especially if the partners pay careful attention to these differences and learn to manage them.

The *awareness of the partners regarding their own profile* is a pre-condition to evaluate the partners' compatibility.

Finally, the fact that *enthusiasm and trust in achieving the goals* also received a considerable number of mentions from the interviewees, reveals that the attitude of individual participants represents an important driving force of the partnership.

### *Operational bases*

Contrary to the relational bases, the operational ones seem to be quite marginal in the interviewees' opinion. They only scored 6 rather dissimilar mentions:

- fair selection and evaluation of the potential partners (3 mentions);
- tax incentives (1 mention);
- projects responding to a real societal demand (1 mention);
- partnerships should not be selective (1 mention).

In the specific phase of the partnership, the relational pre-requisites are clearly more important than the operational ones, even if the *fair selection and evaluation of partners* was mentioned as important.

### *Building of the partnership*

The actual building of a partnership requires from the partners both relational and managerial qualities. However, the ratio between relational (16 mentions) and managerial (55 mentions) aspects is inverted, as seen in the previous section, with respect to the bases for establishing the partnership. This situation is consistent with the fact that building a partnership is an operational phase of the relationship, while the first one (the bases for establishing one) is more a cognitive one.

### *Relational aspects of the partnership building*

The recommendations of the interviewees on the relational aspects of partnership building are as follows:

- understanding of the partners' differences and specific needs (6 mentions);
- engagement/commitment of both partners (3 mentions);
- co-operation of people with different characteristics (generation, gender, profile) (3 mentions);
- building of the relationships (2 mentions);
- compatibility of the personalities of the people in charge (1 mention);
- expectations' of the partners' employees (1 mention).

The main suggestion made by the interviewees concerned the *understanding of the partners' differences and specific needs*. According to the respondents, private companies and civic organizations have different structures, working methods, interests, aims, etc., which are often the cause of misunderstandings. Each partner should, therefore, make a special effort in trying to understand why the other one behaves in a different way; an aspect, which was interpreted by the participants in the Frascati seminar as one of the reasons why most partnerships take time to develop.

Finally, the *commitment of both partners*, be it either personal or professional, was mentioned as an important aspect by both interviewees and participants in the seminar. This item was interpreted as the need for a tangible and concrete involvement, which goes well beyond the act of contributing with financial resources. Businesses and citizens' organizations actually have different kinds of skills, which are all indispensable for the success of the partnership.

Moreover, in addition to the commitment of the main partners, other organizations, as well as other stakeholders (neither private companies, nor citizens' organizations), often need to be involved in the partnership. This remark is linked to what emerged as the major deficiency of the partnerships, which were studied: the lack of involvement of the final beneficiaries.

### *Managerial aspects of the partnership building*

The managerial aspects of partnership building are interesting, since they present, on the one hand, few recommendations mentioned by a large number of interviewees and, on the other, many other isolated items, which are interesting, but seem to be less important to reach the objective:

- definition of clear and shared objectives from the beginning (22 mentions);
- establishment of clear rules concerning the development and management of the partnership (10 mentions);
- clear definition of shared responsibilities and workload (4 mentions);
- shared planning (3 mentions);
- time needed to build the partnership (2 mentions);
- not too much bureaucracy (2 mentions);
- balance between commercial, economic and social purposes (1 mention);
- investment in the relationship (1 mention);
- agreement on a time frame (1 mention);
- agreement on the necessary resources (1 mention);
- not only financial resources, but also competencies, skills, etc. (1 mention);
- inclusion of the partnership in the actors' agenda (1 mention);
- selection of a person in charge of the partnership (1 mention);
- identification of equal benefits (1 mention);
- identification of expertise on both sides (1 mention);
- commitment of the management department (1 mention);
- innovation (1 mention);
- development of own ideas and carry them out together (1 mention).

The *definition of clear and shared objectives from the beginning of the partnership* (22 mentions) is the main recommendation of this section. As already mentioned, the objectives are an essential element in the definition of the partnership itself and in the parties' decision to participate. Therefore, any misunderstanding at this stage can provoke the breakup of the partnership and end the activities it plans to carry out.

Once more, it was emphasized by the participants in the Frascati seminar that the definition of these objectives usually takes time, especially when partners have different visions and values.

The *establishment of clear rules concerning the development and the management of the partnership* is another item often mentioned by the interviewees (10 mentions). Some of them recommended, in particular, the drafting of a written agreement or a code of co-operation; the definition of clear guidelines and common rules regarding participation, decision-making, sanctions, etc. The aim is, again, to clarify from the beginning all the aspects of the partnership, in order to eliminate, as much as possible, the sources of conflict. This item can also be linked to the *clear definition of shared responsibilities and workload* (4 mentions), the establishment of a *shared planning* (3 mentions), the *agreement on a time frame* (1 mention), as well as the *agreement on the necessary resources* (1 mention).

This need for clear rules must be, on the other hand, balanced by the request to *avoid too much bureaucracy* (2 mentions), so that partners do not spend most of their time, resources and energy in dealing with administrative matters. The participants in Frascati seminar also mentioned how bureaucracy can be an obstacle to innovation, which is a crucial element of partnerships.

Even if the *commitment of the management department* was an item which did not receive many mentions in the questionnaires, it should be nevertheless highlighted, since it was mentioned by several speakers as a key element; in particular because it demonstrates the importance of the partnership for the whole company/organization. It was also pointed out that this commitment does not necessarily require a permanent involvement in the partnership.

### Management of the partnership

Contrary to what happened for the two other phases, there is a balance between the relational (36 mentions) and the operational aspects (33 mentions) of partnership management, indicating that both these aspects are essential to the development of the partnership.

#### *Relational aspects of partnership management*

The recommendations of the interviewees on the relational aspects of partnership management were as follows:

- dialogue and communication (31 mentions);
- cooperation (2 mentions);
- empathy among the team (1 mention);
- capacity to say NO (1 mention);
- problem-solving attitude (1 mention).

The fact that most interviewees indicated *dialogue and communication* (31 mentions) as a critical factor for success reveals that it represents one of the key elements of the partnerships.

The specific indications of both businesses and organizations focused on:

- 1) the *quality* of communication, which should be straightforward, continual, open and clear, learn to listen to each other;
- 2) the *modalities* of communication, which should be guaranteed by open discussions, consultations, meetings, ad hoc structures; and
- 3) the *content* of communication, on which only the possible obstacles and problems were explicitly mentioned.

The other aspects mentioned by the interviewees remain fairly isolated cases, even if *cooperation*, *empathy among the team* and *problem-solving attitude* reveal how much the attitudes of individual participants are an important factor for the success of partnerships.

### *Operational aspects of the partnership management*

The recommendations of the interviewees on the operational aspects of partnership management are clearly less focused as in the case of the relational aspects, since there are 17 different entries instead of 5:

- professional behavior/competencies to achieve the targets (6 mentions);
- long term partnerships (5 mentions);
- redefinition of rules/details during the partnership, if necessary (3 mentions);
- accountability (3 mentions);
- effective delivery of results (3 mentions);
- use examples to show the way (2 mentions);
- coherence (1 mention);
- active participation of both partners (1 mention);
- public communication on the partnership (1 mention);
- expert management (1 mention);
- celebration of achievements (1 mention);
- coordination between the partnership's management and operational levels (1 mention);
- respect of the agreement (1 mention);
- adherence to the objectives and resistance to external pressure (1 mention);
- concreteness (1 mention);
- consistency and continuity (1 mention);
- constant involvement of all partners in virtuous contaminating experiences (1 mention).

The two main recommendations were the *professional behavior and competencies of the partners* (6 mentions), as well as the importance of *long term partnerships* (5 mentions). The first one was mentioned primarily by private companies (4 out of 6), which might be an indication of their concern about the professional conduct of citizens' organizations, composed primarily of volunteers.

This aspect was also mentioned by a speaker at the Frascati seminar, who stated that it is essential to select the best possible staff for the partnership, since they will have to take on the challenge of learning the language and the culture of the other partner.

The second recommendation addresses the issue of time, which was repeatedly mentioned in the questionnaires and in Frascati, as one of the key factors in the success of partnerships. Partnerships do, in fact, take a long time both to develop and to produce the first results. In this respect, one of the participants in the seminar suggested, as a general rule, to start with a small scale partnership, identify an objective which can be reached in a reasonable period of time and produce small but satisfying results.

Partnerships have to actually grow from a basis of success. They require patience and commitment on the part of the partners and become stronger over time, which is the reason why long-term partnerships are so valuable.

The *redefinition of rules during the partnership* (3 mentions) indicates a necessary flexibility, which balances the setting of written rules at the beginning of the relationship, and neither questions the *respect of the agreements* (1 mention), nor the *adherence to the objectives* (1 mention).

Finally, *accountability* (3 mentions), together with transparency, should be extended to the relationship between the partners.

### The evaluation of the partnership

While both the questionnaires and the participants' speeches in Frascati indicate it as a key factor of success, the process of evaluating the partnerships appears to be, nevertheless, quite paradoxical since very few recommendations specifically address this aspect:

- verification of the consistency of the company's conduct with its "vision" (1 mention);
- clear evaluation of the partnership (1 mention).

However, a number of recommendations can be implemented only thanks to an evaluation procedure involving, for example:

- identification of equal benefits (1 mention);
- accountability (3 mentions);
- effective delivery of results (3 mentions);
- coherence (1 mention);
- consistency and continuity (1 mention).

Moreover, the speakers at Frascati recommended the definition of clear and measurable objectives, as well as the agreement on the measurement tools from the beginning of the partnership. Furthermore, it was suggested to involve external evaluators, in addition to the partners themselves.

### Conclusion

The analysis of the recommendations emerging from the questionnaires and the discussions at the Frascati seminar, allowed us to draft a first set of the key "ingredients" which should be built-in each step of the development of the partnership, from the bases to the evaluation, including the building and managing of the partnership.

As mentioned before, these guidelines will be completed in the near future. In this report, a number of key issues have only been briefly examined, like for example the evaluation of the partnership; a field for which this survey will have to conduct a more in-depth analysis.

In order to give a brief overview of the numerous indications provided by the interviewees, we have used their answers to the questionnaire to set up a list of the 7 recommendations that were mentioned the most.

The question of time has been inserted in light of the fact that it was mentioned a number of times, both in the building, as well as in the management phase of the partnership.

#### **7 main recommendations**

1. Dialogue and communication
2. Clear and shared objectives
3. Transparency and integrity
4. Mutual trust and respect
5. Clear rules
6. Compatibility between the partners' "visions"
7. Sufficient time



### 3. Guidelines for the evaluation process (Tool A)

This section describes the various steps to follow during the evaluation process and includes a specific explanation on the assessment and indicator scoring. The evaluation process is divided into the following steps:

- STEP 1: Presentation of the tools
- STEP 2: Individual Partner Evaluation
- STEP 3: Joint Evaluation

#### STEP 1: PRESENTATION OF THE TOOLS

The ACN Project Partner (PP) and both Actors of the Partnership (AP) meet to present and discuss the following evaluation tools:

- TOOL B: The Matrix for the Evaluation of the Partnerships (MATRIX);
- TOOL C: Filling the Scores and Depicting the Diamonds;
- TOOL C1a: Civic Organization Scores and Diamond;
- TOOL C1b: Company Scores and Diamond;
- TOOL C1: Shared Scores and Diamond;
- Tool D: The Evaluation Output: lessons learned and future commitments.

The PP will explain the content of the tools and the documents so that the AP can proceed to the next step of the evaluation process, which is the Individual Partner Evaluation (see below).

This meeting could take at the most two hours.

#### STEP 2: INDIVIDUAL PARTNER EVALUATION<sup>3</sup> (to be held between July/August 2007)

Each single partner will evaluate the partnership within the organisation/company using **TOOL B: The Matrix for the Evaluation of the Partnerships (MATRIX)**, which analyses 4 dimensions of a partnership:

- DIMENSION 1: PARTNERSHIP BASES;
- DIMENSION 2: PARTNERSHIP BUILDING;
- DIMENSION 3: PARTNERSHIP MANAGEMENT;
- DIMENSION 4: PARTNERSHIP EFFECTS.

Each dimension is formed by a number of sub-dimensions with their respective indicators.


**Fig. 1 Example of dimension, sub-dimension and indicators**

DIMENSION 1: BASES FOR THE PARTNERSHIP	
<b>SUBDIMENSION 1.2. TRANSPARENCY</b>	
<i>Was the building of the partners' relationship based on transparency?</i>	
INDICATORS	DESCRIPTION
1.2.1 Expectations and interests	Did both partners clearly state what they expected from the partnership and/or what their specific interests were, before starting the relation?
1.2.2 Partners's identity	Do you think you knew enough about your partner (value, purposes, etc.) prior to entering in this partnership?

<sup>3</sup> Is important that the participants can use a computer during the meeting.

A methodology has been designed to reach an homogeneous evaluation with comparable and easily understandable outcomes. These outcomes are the indicator scores (ranging from 0 to 3).

**Fig. 2 Example of indicator scores**



<b>SUBDIMENSION 1.1. TRANSPARENCY</b>						
<i>Was the building of the partners' relationship based on transparency?</i>						
<b>INDICATORS</b>	<b>DESCRIPTION</b>	<b>SCORE 0</b>	<b>SCORE 1</b>	<b>SCORE 2</b>	<b>SCORE 3</b>	<b>SCORE</b>
1.1.1 Expectations and interests	Did both partners clearly state what they expected from the partnership and/or what their specific interests were, before starting the relation?	No	Partially, but their expectations and interests on important matters were not completely stated and resulted in some misunderstandings	Partially, but their expectations and interests on important matters were stated resulting in no misunderstandings	Yes, completely.	
1.1.2 Clarity of partners' values and visions	Were the respective partners' individual organizational values, purposes, and priorities clear prior to entering this partnership?	No	Partially, but there were some important points not clear and this resulted in	Partially, but on the important points there was clarity and therefore there were no misunderstandings	Yes, completely	

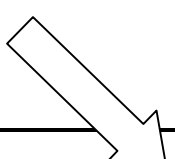
The indicator scores, in a further step (STEP 3), are discussed with the other partner in order to find a shared score for each indicator, then aggregated into sub-dimension and dimension scores.

During the STEP 2 each single partner will:

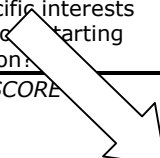
- gather and synthesize the relevant information and data useful for describing and evaluating the partnership according to the 4 dimensions of the MATRIX;
- score the indicators according to the information and data collected and justify each score in the box provided using concrete examples to illustrate the reasons for the score given (Fig. 3).

Since during the following step of the evaluation (STEP 3: JOINT EVALUATION) will be implemented the evaluation of the tools, it would be useful if the AP in this step takes note of the all possible observations that can help to improve the TOOL B.

**Fig. 3: An example of scoring indicators' process**



<b>SUBDIMENSION 1.2. TRANSPARENCY</b>						
<i>Was the building of the partners' relationship based on transparency?</i>						
<b>INDICATOR</b>	<b>DESCRIPTION</b>	<b>SCORE 0</b>	<b>SCORE 1</b>	<b>SCORE 2</b>	<b>SCORE 3</b>	<b>SCORE</b>
<b>1.2.1 Expectations and interests</b>	Did both partners clearly state what they expected from the partnership and what their specific interests were, before starting the relation?	No	Their expectations and interests on important matters were <b>not completely stated</b> and resulted in <b>some misunderstandings</b>	Their expectations and interests on important matters were <b>stated</b> and therefore there were <b>no misunderstandings</b>	Yes, completely	
<i>JUSTIFICATION OF THE SCORE</i>						

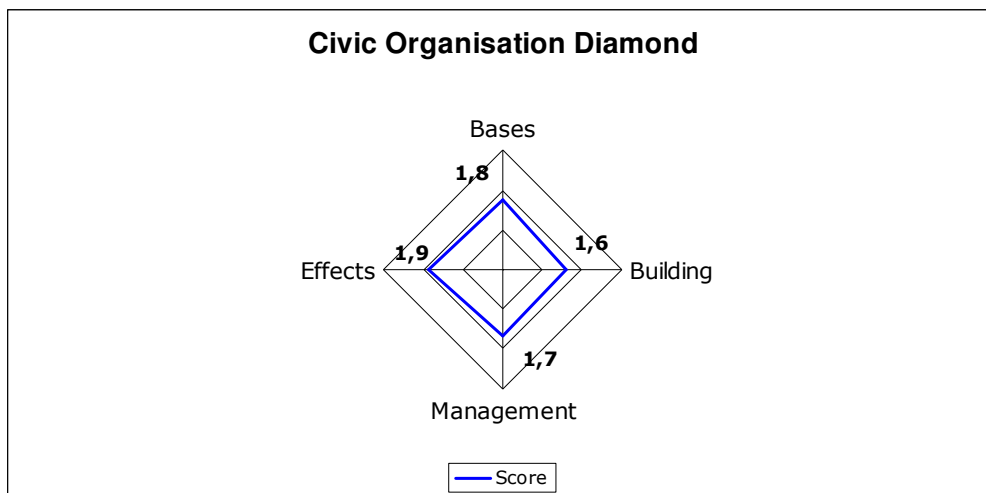


When each AP have decided the final score for all the indicators within the same sub-dimension (i.e. SUBDIMENSION 1: TRANSPARENCY), they then have to fill in the **TOOL C1a** (if the AP is the **civic organisation**) or **C1b** (if the AP is the **company**) putting the indicator scores in the corresponding rows. At this moment **TOOL C: Filling the Scores and Depicting the Diamonds** is to be used to learn how to fill the TOOL C1a or C1b.

Automatically the system will:

- 1) calculate the score for the subdimensions and for the dimension of the partnership;
- 2) build the Civic Organisation Partnership Diamond and the Company Partnership Diamond which illustrate the peculiarity of the partnership in the perception of each single participant.

**Fig. 4: An example of Civic Organisation Diamond**



**STEP 3: JOINT EVALUATION<sup>4</sup>**  
(to be held between July/August 2007)

All the Partnership Actors (APs) meet to assign scores for each indicator based on their own evaluations, the information they have about the partnership and according to the scoring guidelines. For assigning the shared score the partners will discuss the scores that they have previously filled in the TOOL C1a and C1b.

During this step, along with TOOL B, the **TOOL C1: Scores and Diamond of the partnership** and the **TOOL D: Evaluation Output - lessons learned and future commitments** will be used and filled out by the partnership participants.

The meeting should be conducted by a team of two people (FACILITATOR A and FACILITATOR B) belonging to the PP.

FACILITATOR A facilitates the meeting and helps the participants fill in TOOL C and TOOL D.

FACILITATOR B will observe the discussion, note the critical points, implement the questionnaire for evaluating of the evaluation matrix and process (**TOOL E: Questionnaire for the evaluation of the matrix** and **TOOL F: Questionnaire for evaluating the evaluation process**).

At the heart of the meeting is the **shared scoring exercise (explained in points 1-2)**.

<sup>4</sup> Is important that the participants can use a computer during the meeting.

## **1) PROCESS FOR ASSESSING A SHARED SCORE FOR THE INDICATORS**

To generate the final score for the partnership, each indicator of the evaluation matrix needs to be scored. Using the TOOL C1a and C1b as a guide, the participants should go through each indicator one by one.

For each indicator FACILITATOR A has to:

- review the description for each score;
- have both partnerships' participants briefly present available data/information on the indicator, explaining the single score they have assigned and respond to questions of clarification;
- ask participants to score the indicator through a joint discussion;
- welcome discussion as to why participants have assigned the score they have;
- try to reach consensus regarding the score. However if unable to reach an agreement over the score, both scores should be noted.

When the APs have decided the final score for each indicator they have to fill in the TOOL C1. This task should be carried out by one of the AP.

At this moment the TOOL C is to be used to learn how to fill the TOOL C1.

During the process FACILITATOR B should record any comments, explanations, dissenting views etc. from the group.

## **2) PROCESS FOR ASSESSING A SHARED SCORE FOR THE SUBDIMENSIONS AND DIMENSIONS**

After filling in the orange cells of the TOLL C automatically the system will:

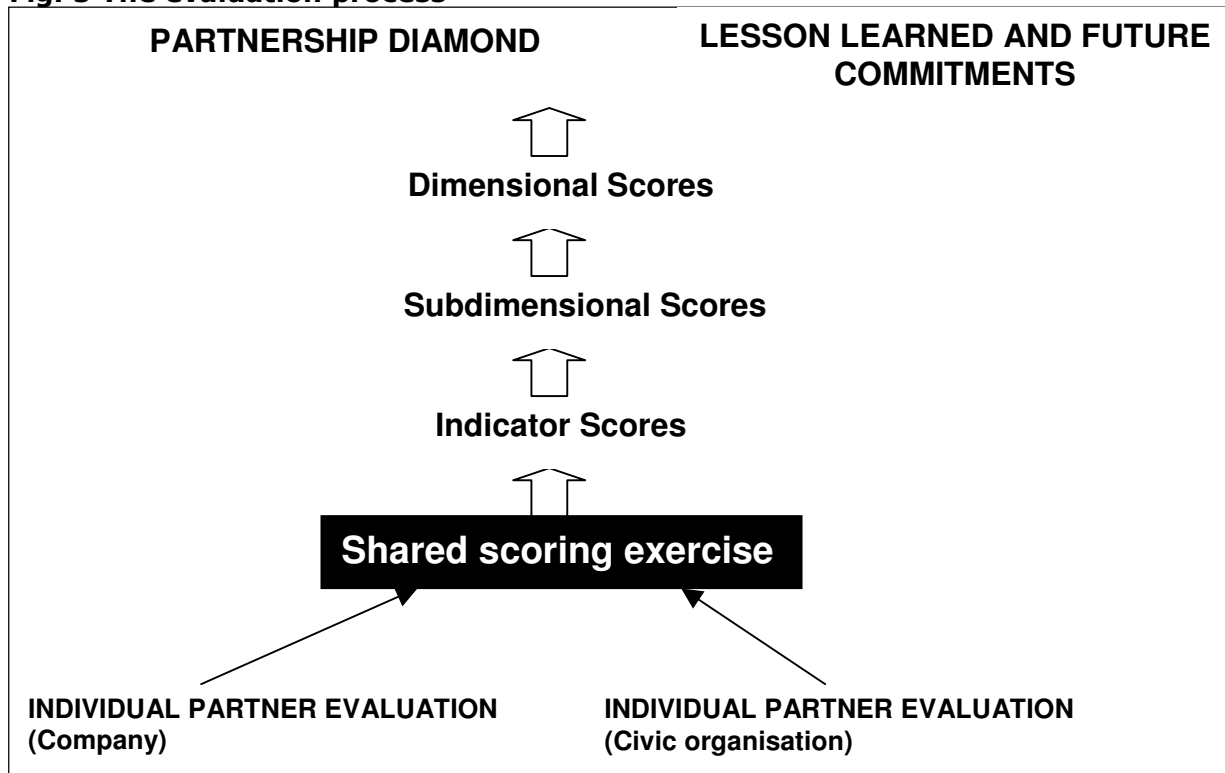
1. calculate the shared score for the subdimensions and for the dimensions of the partnership;
2. build the partnership diamond which illustrate the peculiarity of the partnership.

At this point the FACILITATOR A has to take a few minutes to discuss these results and the FACILITATOR B needs to take note of any disagreement with the overall results (e.g. disagreement with the aggregation process, sense that individual indicator scores have not resulted in an accurate score for the overall dimension, etc.).

After the scoring exercise APs will share and discuss their lessons learned and find an agreement on future commitments for improving their partnership. Participants will select one of the AP to fill in TOOL D. This same person will be responsible for sending out the information after to all the APs and to PP.

The **PARTNERSHIP DIAMOND** and the lesson **LEARNED AND FUTURE COMMITMENTS** are the two outputs of the evaluation process.

**Fig. 5 The evaluation process**



The following is a sample agenda of the Joint Evaluation Meeting with all the indications useful to implement the scoring process.

While it is difficult to predict how long the scoring process will take, we hypothesize a day should be set aside for the meeting.

### **SAMPLE AGENDA FOR THE SCORING MEETING (PP)**

#### **Welcome/introduction** (10 minutes)

- Welcome participants to the meeting and thank them for attending;
- Ascertain that all the parties involved in the partnership are present;
- Explain the purpose and expected outcomes of the meeting;
- If considered necessary or useful, conduct a brief 'ice-breaking' exercise.

#### **Review and clarify scoring process** (15 minutes)

- Verify that all members have brought with them copies of their evaluation matrix (TOOL B) with the justifications for each indicator;
- Review the scoring guidelines (TOOL A) and respond to any questions of clarification. Explain to the group they are asked to assess each indicator based on the discussion within the partnership's parties;
- Explain that scores assigned for indicators will be aggregated into scores for sub-dimensions and dimensions.

#### **Score indicators and calculate (sub-) dimensional scores** (2 hours)

##### *Score indicators of the "Bases" dimension (1/2 hours)*

- follow scoring process outlined above;

- fill in the excel file for the joint evaluation of the partnership (TOOL C1);
- fill in the evaluation output (TOOL D);
- use questionnaire for evaluating the evaluation matrix (TOOL E).

*Score indicators of the "Building" dimension (1/2 hours)*

- follow scoring process outlined above;
- fill in the excel file for the joint evaluation of the partnership (TOOL C1);
- fill in the evaluation output (TOOL D);
- use questionnaire for evaluating the evaluation matrix (TOOL E).

**COFFEE BREAK**

*Score indicators of the "Management" dimension (1/2 hours)*

- follow scoring process outlined above;
- fill in the excel file for the joint evaluation of the partnership (TOOL C1);
- fill in the evaluation output (TOOL D);
- use questionnaire for evaluating the evaluation matrix (TOOL E).

*Score indicators of the "Effects" dimension (1/2 hours)*

- follow scoring process outlined above;
- fill in the excel file for the joint evaluation of the partnership (TOOL C1);
- fill in the evaluation output (TOOL D);
- use questionnaire for evaluating the evaluation matrix (TOOL E).

**Conclusions and next steps** (30 minutes)

- Present the group with the resulting Revised Partnership Diamond (TOOL C1, sheet "Partnership Diamonds");
- Evaluate the evaluation process using the questionnaire provided (TOOL F);
- Welcome comments/discussion regarding the scoring process and final product;
- Ask participant to submit and agree to any written comments they may have that should be taken into consideration while writing the meeting report (that will be written by one of the PA);
- Explain the next steps to come: the Lisbon conference.

**Evaluation of the meeting** (15 minutes)

- Ask participants to provide verbal and/or written feedback on the meeting.

*Closure (10 minutes)*

- Thank participants, review follow-up activities and close the meeting.

*Follow up*

- One of the partner will be in charge to draft a report on the meeting and send it to the other PA as well as the PP;
- the PP will be in charge of analysing the data coming from the matrix evaluation's process.

## **4. The matrix for the evaluation of partnerships (Tool B)**

### **GUIDELINES**

Each single actor of the partnership (AP) will make a first individual evaluation of the partnership within its organisation/company using the present Matrix. It analyses 4 dimensions of a partnership: DIMENSION 1: PARTNERSHIP BASES; DIMENSION 2: PARTNERSHIP BUILDING; DIMENSION 3: PARTNERSHIP MANAGEMENT; DIMENSION 4: PARTNERSHIP'S EFFECTS.

Each dimension is formed by a number of sub-dimensions with their respective indicators that have a score ranging from 0 to 3.

To implement the individual evaluation, each partnership actor (AP) will:

- gather the relevant information and data useful for describing and evaluating the partnership according to the 4 dimensions of the MATRIX;
- score the indicators according to the information and data collected;
- report the score in the specific column of the MATRIX;
- justify each score in the space provided using at least one concrete example to illustrate in a few words the reason for the score given.

NOTE: Since during the following step of the evaluation (STEP 3 joint evaluation meeting) will be implemented the evaluation of the tools, it would be useful if the AP in this step takes note of the all possible observations that can help to improve the TOOL B.

### **THE MATRIX**

#### **DIMENSION 1: PARTNERSHIP BASES**

##### **SUBDIMENSION 1.1. SELECTION OF THE POTENTIAL PARTNER**

*Was the selection process based on explicit criteria?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>1.1.1 Selection process</b>	Was the selection process based on explicit (spoken or written) criteria?	No	The selection process was based on <b>implicit</b> criteria	The selection process was based on <b>some explicit</b> criteria	Yes, the selection process was based on explicit criteria	

*JUSTIFICATION OF THE SCORE*

**SUBDIMENSION 1.2. TRANSPARENCY***Was the building of the partners' relationship based on transparency?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>1.2.1 Expectations and interests</b>	Did both partners clearly state what they expected from the partnership and what their specific interests were, before starting the relation?	No	Their expectations and interests on important matters were <b>not completely stated</b> and resulted in <b>some misunderstandings</b>	Their expectations and interests on important matters were <b>stated</b> and therefore there were <b>no misunderstandings</b>	Yes, completely	

*JUSTIFICATION OF THE SCORE*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>1.2.2 Partners' identity</b>	Do you think you knew enough about your partner (values, purposes, etc.) prior to entering in this partnership?	No	There were some important points <b>not clear</b> and this resulted in <b>some misunderstandings</b>	Important points were <b>clear</b> and therefore there were <b>no misunderstandings</b>	Yes, completely	

*JUSTIFICATION OF THE SCORE***SUBDIMENSION 1.3. RECOGNITION AND TRUST***At the beginning, was the partnership characterized by a mutual recognition and trust among the partners?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>1.3.1 Recognition and trust</b>	At the beginning, was the partnership characterized by a mutual recognition and trust among the partners?	No	Only partially, which caused some <b>problems that weren't solved</b>	Only partially, which caused some <b>problems that were resolved</b>	Yes completely	

*JUSTIFICATION OF THE SCORE***SUBDIMENSION 1.4. STRATEGY***Was the partnership part of the partners' strategies?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>1.4.1 Relevance of the partnership</b>	Has each partner discuss the relevance of this partnership with regards to its individual organizational missions and long-term goals?	No	Each partner has discussed the relevance of this partnership but <b>only within the specific team</b> dealing with this partnership in their organization/company	Each partner has discussed the relevance of this partnership <b>with their specific team as well as the top management</b> of the organization/company	Yes, both partners have discussed the relevance of this partnership with all the significant people of the organisation/company	

*JUSTIFICATION OF THE SCORE*



INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
1.4.2 CSR strategy <sup>5</sup>	Is the partnership included as a relevant part of the partners' CSR strategy?	No	<b>Only one partner</b> has included the partnership in its CSR strategy	The partnership have included in both partners' CSR strategy but only <b>marginally or secondarily</b>	Both partners' have included this partnership as an important element of their CSR strategy	
<i>JUSTIFICATION OF THE SCORE</i>						

## DIMENSION 2: PARTNERSHIP BUILDING

<b>SUBDIMENSION 2.1. COMMITMENT</b>						
<i>Was the senior/top management of the partners involved in the partnership?</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
2.1.1 Commitment	Has the senior/top management been involved in all the phases of the partnership?	No, it has not been involved at all	The senior/top management has been involved <b>only in one phase</b> of the partnership (at the beginning or at the end)	The senior/top management has been involved in <b>more than one phase</b>	Yes, the senior/top management has been involved in all the phases of the partnership	
<i>JUSTIFICATION OF THE SCORE</i>						
<b>SUBDIMENSION 2.2. OBJECTIVES</b>						
<i>Were the objectives of the partnership defined together and in a clear manner?</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
2.2.1 Joint definition	Have the objectives of the partnership been defined together beforehand?	No, the objectives have not been defined	They have been defined <b>unilaterally</b> by one of the partners	<b>Some objectives</b> have been defined <b>together</b> but not all of them	Yes, they have been all defined together	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
2.2.2 Clear definition	Have the objectives been defined in a clear manner?	No, the objectives have not been defined <b>OR</b> they have been defined implicitly	Partially but leaving room for <b>misunderstandings</b>	Partially but <b>without any misunderstanding</b>	Yes, completely (i.e. in a written document)	

<sup>5</sup> CSR strategy for NGOs means that they have a policy on working with companies.

JUSTIFICATION OF THE SCORE

### SUBDIMENSION 2.3. RESPONSIBILITIES AND CONTRIBUTIONS

*Were the responsibilities and contributions of both partners clearly defined?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>2.3.1 Responsibilities</b>	Have the roles and responsibilities in the partnership been defined in a joint and explicit manner?	No, roles and responsibilities have not been defined	<b>One partner unilaterally</b> defined the roles and responsibilities	<b>Part of the roles and responsibilities</b> have been defined by the partners in a joint and explicit manner	Yes, roles and responsibility have been completely defined by the partners in a joint and explicit manner	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>2.3.2 Contributions</b>	Have both partners clearly defined the specific contributions (skills, resources, etc.) they would bring to the partnership?	No	<b>Only one partner</b> has clearly defined its specific contributions.	<b>Both partners</b> have <b>partly</b> defined their contributions.	Yes, both partners have completely defined their contributions.	

JUSTIFICATION OF THE SCORE

### SUBDIMENSION 2.4. RULES

*Did the partners establish explicit rules regarding the functioning of the partnership?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>2.4.1 Management rules</b>	Have the partners established explicit rules regarding the functioning of the partnership?	No, there have been no rules <u>OR</u> they have been implicit.	There have been some rules but leaving room for <b>misunderstandings</b> .	There have been some rules but <b>without any misunderstanding</b> .	Yes, completely (i.e. in a written document).	

JUSTIFICATION OF THE SCORE

### SUBDIMENSION 2.5. EVALUATION

*At the beginning of the partnership was an evaluation of the partnership planned ?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>2.5.1 Evaluation</b>	Has an evaluation of the partnership been planned from the start?	No an evaluation has not been planned.	<b>Only one partner</b> has planned it <b>within its own organization</b> .	<b>Both partners</b> have planned it but <b>separately</b> (within their own organisation).	Yes, the partners have planned a joint evaluation of the partnership.	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>2.5.2 Social impact assessment</b>	Have the partners define indicators to measure the social impact of the partnership?	No	<b>One partner</b> has <b>unilaterally</b> defined indicators.	<b>Both partners</b> have defined <b>some</b> indicators.	Yes, the partners have defined together a set of indicators.	

JUSTIFICATION OF THE SCORE

### DIMENSION 3: PARTNERSHIP MANAGEMENT

#### SECTION A: MANAGEMENT OF THE RELATION BETWEEN THE PARTNERS

#### SUBDIMENSION 3.1. COMMUNICATION

*What kind of communication was there among the partners?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.1.1 Clarity</b>	Has the communication between partners been straightforward and clear?	No	It has <b>not</b> been <b>straightforward and clear on some important matters</b> , causing some misunderstandings	It has been <b>straightforward and clear on important matters</b> which prevented misunderstandings.	Yes, the communication has been entirely straightforward and clear	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.1.2 Timeliness</b>	Has the communication between partners been timely/opportune ?	No	<b>Only one partner</b> has communicated in a timely/opportune manner	Both partners have <b>sometimes</b> communicated in a timely/opportune manner	Yes, both partners have always communicated in a timely/opportune manner	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.1.3 Continuity</b>	Has the communication between partners been regular?	No	<b>One partner</b> has communicated on a regular basis and the other one has <b>not answered</b>	<b>One partner</b> has communicated on a regular basis and the other one <b>has not answered</b>	Yes, both partners have been communicating on a regular basis	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.1.4 Relevance</b>	Have partners been communicating on the relevant issues?	No	Some <b>relevant</b> issues have been <b>left out</b>	Partners have been communicating on both <b>relevant and irrelevant</b> issues	Yes, partners have been communicating all relevant issues	
<i>JUSTIFICATION OF THE SCORE</i>						
<b>SUBDIMENSION 3.2. TRANSPARENCY AND ACCOUNTABILITY</b>						
<i>Are the transparency and accountability of the partnership management guaranteed?</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.2.1 Transparency</b>	Has there been transparency between partners regarding the partnership management and the aspects related to the partnership dynamics?	No	There has been transparency only regarding <b>marginal matters</b>	There has been transparency regarding <b>some important matters</b>	Yes, there has been complete transparency between partners regarding the partnership management and the partnership dynamics	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.2.2 Monitoring process</b>	Has there been a common monitoring process of the partnership (i.e. through written reports, meetings, etc.)?	No	<b>Only one partner</b> has carried out a monitoring process of the partnership	<b>Both partners</b> have carried out a monitoring process but <b>separately</b>	Yes, the partners have carried out together a monitoring process of the partnership	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.2.3 External reporting</b>	Have the partners produced joint reports about the partnership for the public?	No	<b>Only one partner</b> has produced reports for the public	<b>Both partners</b> have produced reports for the public but <b>separately</b>	Yes, the partners have produced joint reports for the public	
<i>JUSTIFICATION OF THE SCORE</i>						
<b>SUBDIMENSION 3.3. MISUNDERSTANDINGS, DISAGREEMENTS AND SUCCESSES</b>						
<i>Did the partners manage their relationship in order to avoid misunderstandings, overcome disagreements and take advantage of successes?</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE

<b>3.3.1 Misunderstandings</b>	Has each partner made an effort to understand each others' perspectives (general objectives, strategies, organisation of the work, etc.)?	No	Partially, which has <b>caused some misunderstandings</b>	Partially, but the effort has been placed on important matters, which <b>avoided major misunderstandings</b>	Yes, completely, which has avoided any misunderstanding	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.3.2 Management of disagreements</b>	Has there been an effective management of the disagreements between partners?	No, disagreements between partners have not been managed at all	<b>Only marginal</b> disagreements between partners have been effectively managed	<b>Most of the important</b> disagreements between partners have been effectively managed	Yes, all disagreements between partners were effectively managed	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.3.3 Successes</b>	Have you celebrated the partnership successes?	No, we have not been aware of our successes	Each partner has celebrated <b>on its own</b>	Celebration has been <b>limited</b> to the operative staff of the partnership	Broad celebration of the partnership successes (i.e. including senior/top management)	
<i>JUSTIFICATION OF THE SCORE</i>						

## **SECTION B: ORGANISATIONAL MANAGEMENT OF THE PARTNERSHIP**

<b>SUBDIMENSION 3.4. RESPONSIBILITIES AND POWERS</b>						
<i>Were the responsibilities and powers in the partnership effectively shared?</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.4.1 Leadership</b>	Has the leadership of the partnership been explicitly shared?	No, there has been no explicit recognition of the leadership	The leadership has been taken on as an <b>autonomous initiative by one of the partners</b>	The leadership has been <b>shared but has not been explicitly formalized</b>	Yes, the leadership has been shared and formalized among the partners	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.4.2 Operational responsibilities</b>	Have the distribution of operational responsibilities been appropriate with respect to each partner's competencies?	No, there has been any distribution of responsibilities	There has been a distribution of responsibilities but <b>without taking into account the specific competencies</b> of each	There has been a distribution of responsibilities but taking <b>into account only one of the partner's competences</b>	Yes, the distribution of responsibilities has been appropriate taking into account each partner's	

			partner		competencies	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.4.3 Decision-making process</b>	Has the decision-making process been shared and balanced?	No	<b>Only marginal decisions</b> have been taken together however <b>one partner</b> has had a <b>greater weight</b> than the other one	<b>Most important decisions</b> have been taken together however <b>one partner</b> has had <b>greater weight</b> than the other one	Yes, all decisions have been taken together in a balanced way	
<i>JUSTIFICATION OF THE SCORE</i>						
<b>SUBDIMENSION 3.5. STABILITY OF THE PARTNERSHIP</b>						
<i>Are the human resources working in the partnership stable?</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.5.1 Human resources</b>	Has there been a stable team managing the partnership?	No	The team of <b>only one partner</b> has been stable while the other partner has changed in a substantial way	The team managing the partnership has <b>changed only slightly</b>	Yes, there has been a stable team managing the partnership composed of representatives of each partner	
<i>JUSTIFICATION OF THE SCORE</i>						
<b>SUBDIMENSION 3.6. STAKEHOLDER ENGAGEMENT</b>						
<i>Are the stakeholders involved in the partnership?</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.6.1 Beneficiaries</b>	Has there been mechanisms to allow beneficiaries to give input into the partnership?	No	<b>Only in the final phase</b> (i.e. evaluation of the results)	<b>During the development</b> of the partnership	Yes, from the beginning	
<i>JUSTIFICATION OF THE SCORE</i>						
INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>3.6.2 Public institutions</b>	Have the public institutions been involved in the partnership?	No	<b>Only at the end</b> or in the final phase	During the <b>development</b> of the partnership	Yes, from the beginning	
<i>JUSTIFICATION OF THE SCORE</i>						

<b>SUBDIMENSION 3.7. UNEXPECTED EVENTS</b>						
<i>Was there a shared and effective management of the unexpected external events?</i>						
<b>INDICATOR</b>	<b>DESCRIPTION</b>	<b>SCORE 0</b>	<b>SCORE 1</b>	<b>SCORE 2</b>	<b>SCORE 3</b>	<b>SCORE</b>
<b>3.7.1 Unexpected events</b>	Has the management of unexpected external events been shared among the partners?	No, there has not been any management of unexpected events	<b>Only one partner</b> has managed the unexpected events	<b>Both partners</b> have managed the unexpected events but <b>separately</b>	Yes, the partners together have managed the unexpected events together	
<i>JUSTIFICATION OF THE SCORE</i>						

## DIMENSION 4: PARTNERSHIP'S EFFECTS

<b>SUBDIMENSION 4.1. IMPROVEMENTS IN THE PARTNERSHIP</b>						
<i>Did the partnership improve?</i>						
<b>INDICATOR</b>	<b>DESCRIPTION</b>	<b>SCORE 0</b>	<b>SCORE 1</b>	<b>SCORE 2</b>	<b>SCORE 3</b>	<b>SCORE</b>
<b>4.1.1 Stability</b>	Did the partnership become a stable relationship?	No, it became less stable than when it started	The partnership relationship remained <b>the same</b> as when initiated	The partnership relationship has become <b>to some extent</b> more stable	Yes, the partnership has become a stable relationship	
<i>JUSTIFICATION OF THE SCORE</i>						
<b>INDICATOR</b>	<b>DESCRIPTION</b>	<b>SCORE 0</b>	<b>SCORE 1</b>	<b>SCORE 2</b>	<b>SCORE 3</b>	<b>SCORE</b>
<b>4.1.2 Activities</b>	Have the partnership activities grown?	No, they became less and less complex than when the partnership began	The activities have remained <b>the same</b> as in the beginning	The activities are <b>more complex or numerous</b> than the beginning	Yes, the activities have increased both in complexity and number	
<i>JUSTIFICATION OF THE SCORE</i>						
<b>INDICATOR</b>	<b>DESCRIPTION</b>	<b>SCORE 0</b>	<b>SCORE 1</b>	<b>SCORE 2</b>	<b>SCORE 3</b>	<b>SCORE</b>
<b>4.1.3 Partners</b>	Did the partnership extend to other partners?	No, and in addition some partners have left the partnership	Partners are <b>the same</b> as in the beginning	The partnership includes <b>only one more</b> partner	The partnership includes at least two more partners	
<i>JUSTIFICATION OF THE SCORE</i>						

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>4.1.4 Degree of commitment</b>	Do partners' involvement go beyond their initial commitment (in terms of human, economic and in kind resources)?	No, the partners' involvement is below their initial commitment	The partners' involvement is <b>the same</b> as their initial commitment	<b>Only one partner's</b> involvement went beyond its initial commitment	Both partners' involvement goes beyond their initial commitment	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>4.1.5 Trust</b>	Did the trust among partners increase?	No, the trust among partners decreased	The trust among partners remained <b>the same</b>	Only the trust of <b>one partner</b> increased	Trust among both partners increased	

JUSTIFICATION OF THE SCORE

#### SUBDIMENSION 4.2. IMPROVEMENTS IN THE PARTNERS

*Did the partnership have any positive effect on the partners?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>4.2.1 Competencies</b>	Did the partners' competencies and skills enhance?	No, each partner's competencies and skills remained the same	<b>Only one partner's</b> competencies and skills enhanced	<b>Both partners'</b> competencies and skills enhanced <b>slightly</b>	Yes, the partners competencies and skills enhanced significantly	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>4.2.2 Public image</b>	Did the partners' public image improve?	No, there has been a <b>negative effect</b> on one (or both) of the partners' public image	The partners' public images remained <b>the same</b>	<b>Only one</b> partners' public image <b>improved</b> while the other remained the same	Yes, the partners' public image improved	

JUSTIFICATION OF THE SCORE

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>4.2.3 CSR strategy</b>	Has this partnership influenced the CSR strategies of the partners?	No, because the partners do not have a CSR strategy	The partnership has influenced <b>only one</b> partner's CSR strategy while not affecting the other's	The partnership has influenced CSR strategy of <b>both partners</b> but only <b>slightl</b>	Yes, this partnership has influenced significantly both partners' CSR strategies	

JUSTIFICATION OF THE SCORE



**SUBDIMENSION 4.3. RESULTS**

*Do the partnership's results correspond to the initial expectations?*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>4.3.1 Initial expectations</b>	Have the partnership's initial expectations been reached as of now?	No, not at all	<b>Some of them</b> have been reached	Yes, <b>as expected</b>	<b>More</b> than expected	

*JUSTIFICATION OF THE SCORE*

INDICATOR	DESCRIPTION	SCORE 0	SCORE 1	SCORE 2	SCORE 3	SCORE
<b>4.3.2. Social impact</b>	Has the partnership had the social impact it expected?	No, none of the objectives have been reached	<b>Some</b> of the objectives have been reached	<b>All</b> objectives have been reached	The social impact has been superior to the expectations	

*JUSTIFICATION OF THE SCORE*

## 5. The evaluation output: lesson learned & future commitments (Tool D)

### DIMENSION 1: PARTNERSHIP BASES

SUBDIMENSION	LESSON LEARNED	COMMITMENT TO IMPROVE THE PARTNERSHIP
SUBDIMENSION 1.1. SELECTION OF THE POTENTIAL PARTNER		
SUBDIMENSION 1.2. TRANSPARENCY		
SUBDIMENSION 1.3. RECOGNITION AND TRUST		
SUBDIMENSION 1.4. STRATEGY		

### DIMENSION 2: PARTNERSHIP BUILDING

SUBDIMENSION	LESSON LEARNED	COMMITMENT TO IMPROVE THE PARTNERSHIP
SUBDIMENSION 2.1. COMMITMENT		
SUBDIMENSION 2.2. OBJECTIVES		

<b>SUBDIMENSION 2.3. RESPONSIBILITIES AND CONTRIBUTIONS</b>		
<b>SUBDIMENSION 2.4. RULES</b>		
<b>SUBDIMENSION 2.5. EVALUATION</b>		

**DIMENSION 3: PARTNERSHIP MANAGEMENT**

<b>SUBDIMENSION</b>	<b>LESSON LEARNED</b>	<b>COMMITMENT TO IMPROVE THE PARTNERSHIP</b>
<b>SUBDIMENSION 3.1. COMMUNICATION</b>		
<b>SUBDIMENSION 3.2. TRANSPARENCY AND ACCOUNTABILITY</b>		
<b>SUBDIMENSION 3.3. MISUNDERSTANDINGS, DISAGREEMENTS AND SUCCESSES</b>		
<b>SUBDIMENSION 3.4. RESPONSIBILITIES AND POWERS</b>		
<b>SUBDIMENSION 3.5. STABILITY OF THE PARTNERSHIP</b>		
<b>SUBDIMENSION 3.6. STAKEHOLDER ENGAGEMENT</b>		

<b>SUBDIMENSION 3.7. UNEXPECTED EVENT</b>		
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**DIMENSION 4: PARTNERSHIP'S EFFECTS**

<b>SUBDIMENSION</b>	<b>LESSON LEARNED</b>	<b>COMMITMENT TO IMPROVE THE PARTNERSHIP</b>
<b>SUBDIMENSION 4.1. IMPROVEMENTS IN THE PARTNERSHIP</b>		
<b>4.2. IMPROVEMENTS IN THE PARTNERS</b>		
<b>SUBDIMENSION 4.3. RESULTS</b>		