Module 2:

Engaging Stakeholders & Working with Partners

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2. Engaging Stakeholders & Working with Partners

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Introduction

Understanding who the stakeholders are, their interests, how they relate to each other, and how to engage them is something you need to work on early in the process of developing a capacity development strategy, plan or intervention. The success of your initiatives will depend on having strong stakeholder commitment, so getting started in the right way will give you strong foundations for everything that follows. Identifying your stakeholders and planning how to engage them in a capacity development intervention is the first step for practical implementation. Some stakeholders may become partners and partners will always be stakeholders in any initiative.

This module aims to give you an understanding of:

- Identifying and mapping stakeholders to understand their perspectives;
- Engaging and maintaining relationships with your stakeholders; and,
- Identifying and working with partners.

2.1 Engaging with Stakeholders

This guide uses the following definition of stakeholders, which is aligned with formal UN definitions:

> *Stakeholders are defined as an individual or group (including government and non-government institutions, , indigenous peoples and local communities, women and youth organizations, civil society, private sector, academia, faith-based organizations, development agencies, donors and banks, donors) that has a legitimate stake or interest in the capacity development intervention and is either participating in or likely to be affected or influenced by the intervention.*

2.1.1 Why Engaging Stakeholders Matters

Capacity development is not something anyone can do alone, especially for biodiversity. Whatever level or type of action is needed you will always have to work with others to start and sustain change processes. The benefits of effective engagement are many, most particularly ownership, legitimacy, sustainability, and creating opportunities for collaboration.

2.1.2 Lessons Learned

Experience has shown that not engaging with stakeholders effectively right from the start of any capacity development process can create problems later on. Key lessons learned are that not engaging stakeholders and understanding what their interests and perspectives are risks:

- Missing information and knowledge that is important for making the right decisions about what needs to be done and how to do it;
- Alienating key groups who might be critical for successful implementation; and
- Missing opportunities for positive collaborative action.

2.2 How to Identify and Map Stakeholders

The first steps for engaging your stakeholders is to identify firstly who needs to be involved in any way and then who has any interests in the initiative you are undertaking. When you have the list of key organisations, groups and individuals you will find it helpful to create a map that shows how they all relate to your initiative and to each other.

2.2.1 Getting Started

To get started you need to answer three key questions:

- **What capacity are you aiming to develop and why?**
- **Who needs to be engaged?** and,
- **How can the stakeholders be grouped and analysed?**

Much of the information you need can likely be assembled from existing working relationships and contacts, but some might need to be assessed through more detailed investigation or activities like workshops.

What capacity are you aiming to develop and why?

What is the focus of the capacity development intervention? What is it that the target stakeholders need to know or be able to do? Are you getting started on developing an NBSAP? Or are you working on a specific issue such as invasive alien species or ecosystem restoration? Or has your NBSAP been approved and you now need to develop the programme and projects to put it into action. The answer to any of these questions might be your starting point.

Who needs to be engaged?

Who is going to be directly involved in any way, or whose interests will be affected by the capacity development intervention? Whose actions or interests are going to affect the intervention? Who is going to influence and control implementation? Who possess the resources that will be needed? This may be government actors, international organizations, indigenous peoples and local communities, women and youth organizations, civil society, private sector, academia, faith-based organizations, or citizens. The relevant people may be at different levels ranging from national, subnational to community.

Box 0-1: Implementing the Kunming-Montreal Global Biodiversity Framework: applying a whole-of-government and whole-of-society approach

The Kunming–Montreal Global Biodiversity Framework (GBF) calls for a ***whole-of-government*** and ***whole-of-society*** approach to implementation. This means that biodiversity action cannot rest solely with one ministry, organization, or group. Instead, all parts of government and society must work together; aligning their policies, capacities, and efforts toward shared biodiversity goals.

This approach provides the foundation for ***effective stakeholder engagement and partnerships*** in capacity development. When applied in practice, it transforms capacity development from a set of isolated activities into a **collaborative process**, that builds the relationships, systems, and collective commitment required to achieve the GBF's goals. It reinforces that capacity development under the GBF must be **inclusive, participatory, and partnership-driven**, engaging diverse actors to co-create and sustain solutions for biodiversity.

How can the stakeholders be grouped and analysed?

What level of engagement is required for each stakeholder? What level of influence would the stakeholder have? Who is for and against the intervention? What role will the stakeholder play in the intervention? What capacity and comparative advantage does the stakeholder have in relation to the intervention?

Some helpful questions for grouping are:

- Who will participate directly in the process?
- Who needs to be consulted to get their input?
- Who needs to be informed?
- Who can be partners and champions for change?
- Who might resist change?

Exactly who needs to be on the list will partly be obvious at the start of the process, but the list is sure to expand as the mapping and analysis is underway.

Box 0-2: Example of a guide list of stakeholder groupings

Taking the example of the NBSAP a ministry of environment the guide list of others to be consulted would include:

- Government ministries and agencies with direct interests, such as agriculture, rural development, public works, and finance;
- Relevant private sector groups;
- Civil society organisations and non-government organisations working on the environment and/or with local communities;
- Citizens, possibly in different groups such as Indigenous Peoples, or by occupational interest groups such as farmers and fishers; and,
- For countries in receipt of aid, including the development partner community is essential.

2.2.2 Tools for Identifying and Mapping Stakeholders

Stakeholder **mapping** is a strategic tool used to visualise everyone involved in an imitative and the relationships between then. It is an important step in the process of identify key actors, assessing their influence and developing targeted engagement strategies.

Stakeholder **grouping** is the categorisation of stakeholder based on their shared attributes or interests, and this is a part of the mapping process.

There are many tools and methods available for identifying, mapping and grouping stakeholders. The tools suggested here are easy to use and effective for managing and presenting the information you need to assemble.

Practitioner tip:

Involve others when using the tools

While you could work alone to use these tools you will have much better results if you complete them with others. You can use different processes to do so, for example brainstorming with colleagues, focus group discussions, workshops or targeted interviews with key informants, or maybe a combination of methods.

Tool 1: Listing Stakeholders

The simple matrix in Table 2-1 is for making a list of stakeholders and recording some key basic information about them. These headings are useful because they include two very relevant considerations that you will need in the next steps, i.e. relevance and influence, and links to others on the list.

Table 2-1: Sample Tool for Listing Stakeholders

Organisation or group, including key individuals and their positions	Type e.g. government, civil society	Level of engagement: direct, intermediate, or observing	Links to others

Practitioner tips:

- **Adjust the matrix**

If you find that you need to record different information adjust the number and headings of the matrix so you can capture everything you need. stakeholders.

- **Remember to consider different levels**

While it might be clear that for your capacity development process to be successful individuals will need new knowledge and skills, in most cases the main challenges are other levels. There may be systemic blocks in the enabling environment or the organizational level. For example, laws are an essential part of the enabling environment, but they may not exist, be irrelevant to current circumstances, or only partly enacted. In which case the lawmakers are a key stakeholder group. Or perhaps an organisational has been slow in implementing new systems, in which case leadership are key stakeholders.

When to use it

Use this as the first step in your process. Working with others to help you complete the information and make a note of every organisation, group or individual will ensure the starting list is as comprehensive as possible. As this matrix is like a street directory, it should be considered as the preparatory step for creating the visual map.

How to use it

Identify all the individuals, groups or entities with an interest or stake in the capacity development intervention and put each one in a separate box in the first column. Then gather the information needed to complete the other boxes. Your list might be a very complex with a lot of actors and information about them. Getting validation by asking key stakeholders to review and provide feedback will make sure that you haven't missed anything important or made any mistakes in this important first step.

Practitioner tip:

Ensure everyone is included

A challenge in stakeholder mapping is missing out marginalized or underrepresented groups. You can overcome this by taking time to talk to as many people as possible to get their ideas about who should be involved and not excluding anyone even if their relevance is not obvious at first. The other important way to deal with this challenge is to remember that a stakeholder map should be a living document that you can review and update regularly.

Tool 2: Questions for grouping the stakeholders

This table of questions is a useful tool for grouping stakeholders into the main categories such as decision makers, supporters, etc. It gives guide questions for four main stakeholder groups, with some suggestions about who to consider might be in each. This is also a foundational step for analysis, as you look at important issues like expected level or engagement, and who has control of resources.

Table 2-2: Sample questions for grouping stakeholders

	Guide questions	Who might be in this group
Key decision makers and influencers	• Who has the power to make decisions and shape relevant biodiversity policy? • Who has the power to support or block implementation of any decisions made? • Who influences the decision-makers in terms of supporting biodiversity capacity development? • Who controls finance and resources?	• The minister • The provincial governor • A businessman with powerful political connection and interests in the target area • A community member leading resistance to commercial development on the land
Supporters and resisters	• Who wants the change to happen and who does not? • Who would gain or lose from a capacity change and what influence do they have on decision-makers? (This can be analysed in a force field analysis exercise, see Figure 3-4 below).	• For change • The minister • Provincial governor and local government leaders • The local community • Against change • The businessman

Target audience and interested others	• Who will be directly affected by the capacity change process - individuals or groups of people at different levels • Who is not directly involved, but may watch what is happening and intervene if they feel the need to for some reason	• Directly involved • Local government • Local businesses • Local communities • Indirectly involved • Politicians and policy makers • Other big business interests • Donor community
Partners and allies for action	• Who will support action, either through direct involvement, or in other less direct ways such as facilitating access to resources?	• Senior level in the ministry • Local government officials • International and local NGOs

Practitioner tip:

It is not a problem if some people or groups fall into more than one category, in fact you should expect it. For example, a key decision maker might be a supporter or a resister, and it is inevitable that not everyone within a group will have the same attitudes or interests. When this happens, it is an indication that the group are very significant and need to be involved.

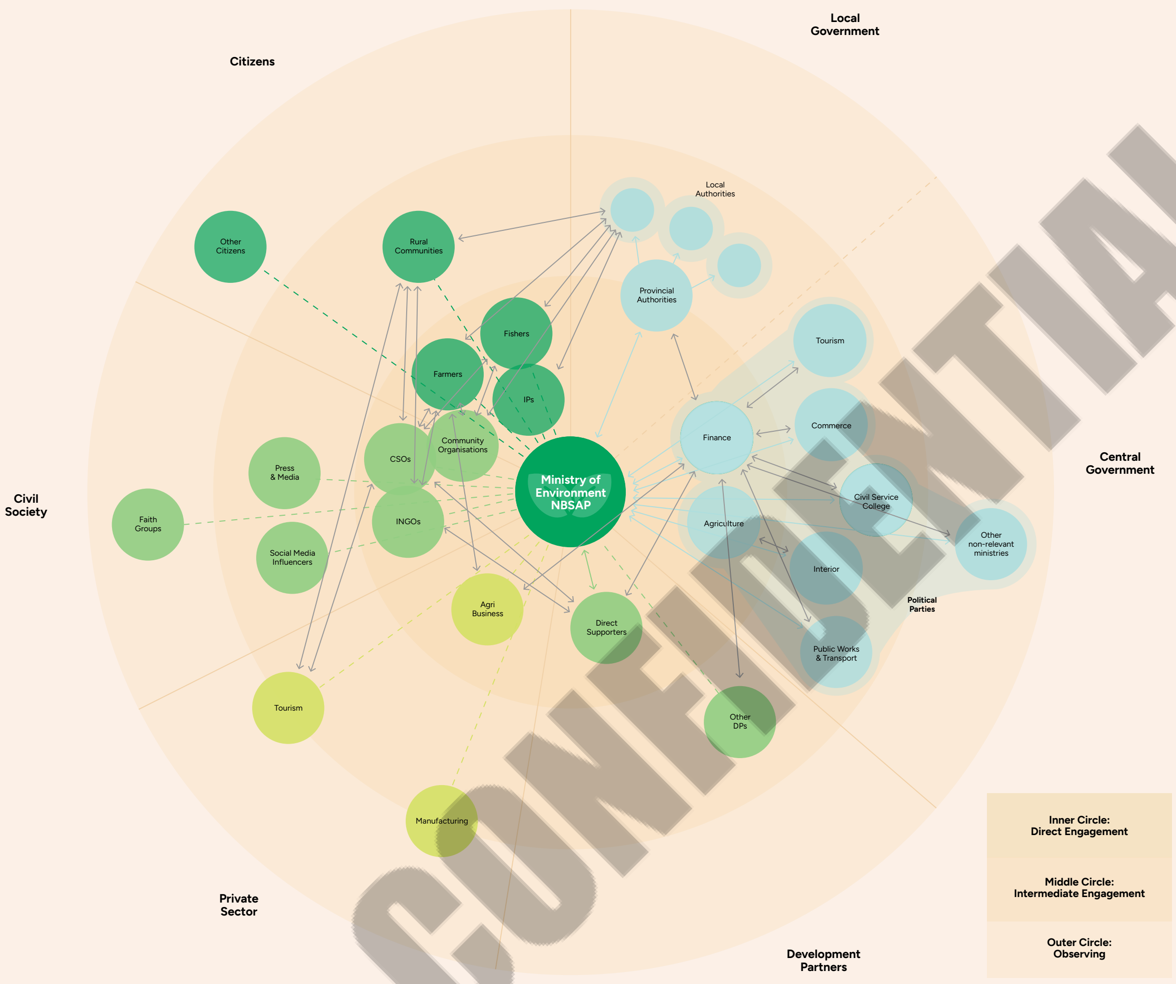
When to use it

You don't have to group your stakeholders using this tool, but if you do it would be the second step in your process. The results would help you know when to place all the groups and organisations on the list into the map.

Tool 3: Stakeholder map

When you have completed the list you can use the information to create your map according to what will fit your situation, based on what will be the most helpful grouping of the stakeholders to support analysis for decision making at the design stage. The example in Figure 2-1, about what it might look like for developing an NBSAP, has started with the key ministry and used groups and levels of engagement as the criteria for organising all the other stakeholders they will need to engage with or be aware of.

Figure 2-1: Example of a Stakeholder Map



Note: in this map most of the arrows are two-way indicating the active nature of relationships. A common weakness of stakeholder maps is one-way arrows that don't recognise the interactive and/or reciprocal nature of dealings between different actors. Using arrows shows where bridges already exist, and where they might need to be built.

Practitioner tip:

Recognise complexity

If the issue is big and complex, you are going to have a long list of stakeholders to put into the map in different groupings. Don't be worried if it looks complex (and maybe a bit messy too), it needs to be to reflect the reality.

When to use it

Use the stakeholder mapping tool as a preparatory step for assessing and analysing existing capacity, needs and gaps.

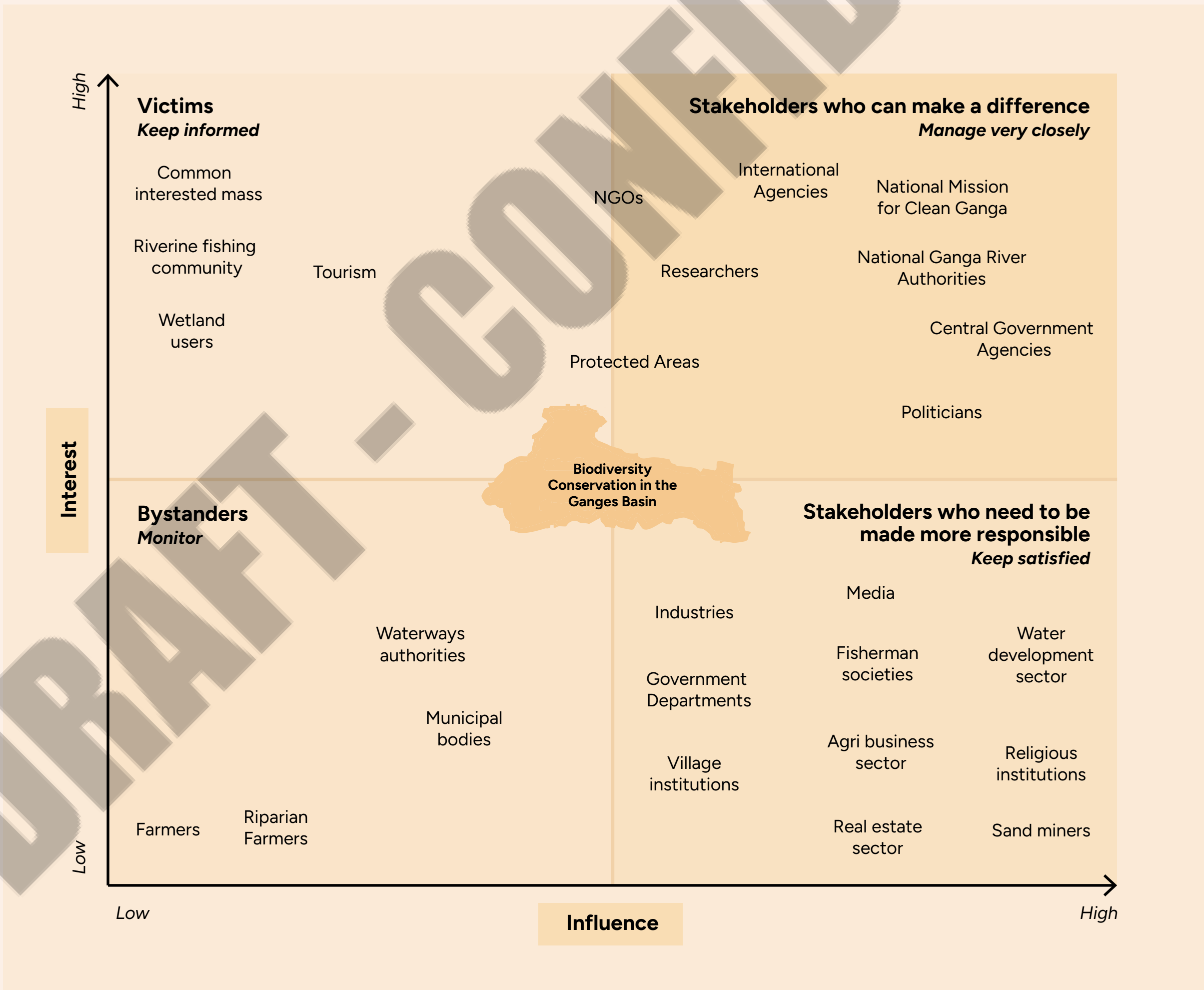
2.3 How to Analyse Stakeholders and their Interests

Stakeholder analysis is linked to other start up activities, in particular the process for assessing existing capacity and needs. You will need to decide about whether they are done separately or together, and this will depend on factors like how much you know in advance and how much you still need to find out.

Tool 4: Interest-influence matrix

An Interest-Influence Matrix is a stakeholder analysis tool that categorizes stakeholders based on their level of influence and interest in a project or organization. It helps prioritize engagement strategies by placing stakeholders into four quadrants: High Power/High Interest (Manage Closely), High Power/Low Interest (Keep Satisfied), Low Power/High Interest (Keep Informed), and Low Power/Low Interest (Monitor). The example in Figure 2-2 below is from a real-life mapping exercise conducted in India.

Figure 2-2: Example of an Interest-Influence Matrix



Box 0-3: The importance of knowing about conflicts of interest

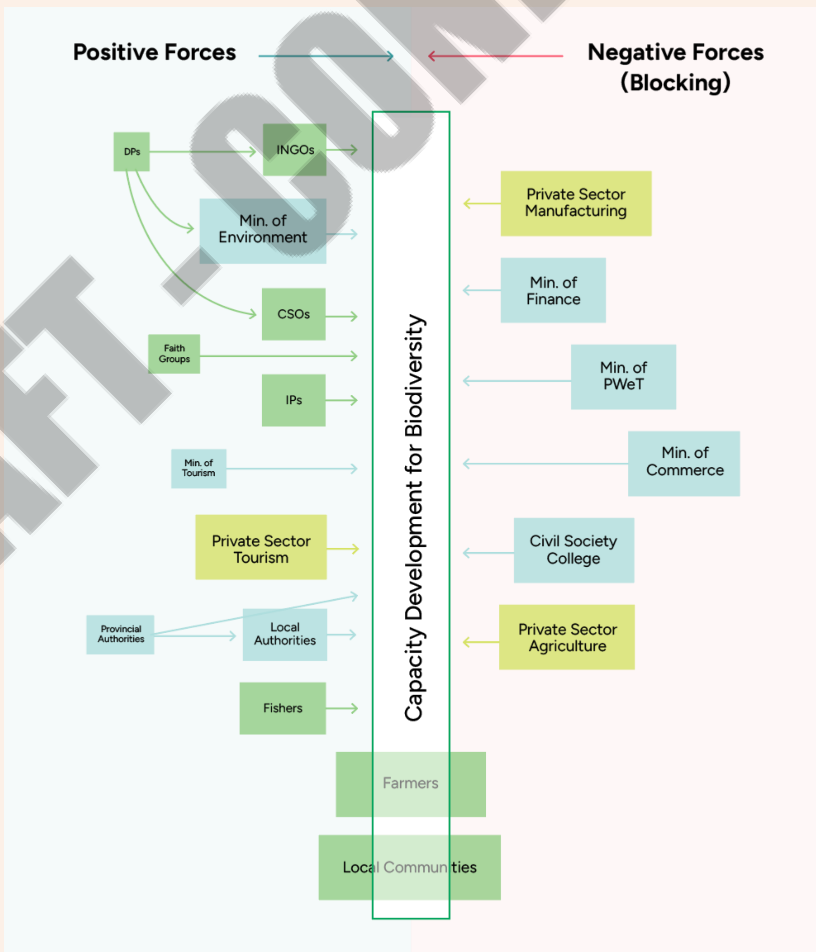
Conflicts of interest among stakeholders, especially the powerful ones, have the capacity to undermine progress of any initiative in a major way. Knowing about conflicts of interest will flag up potential difficulties you might have to negotiate and problem solve. These questions can help you understand what you might have to deal with.

- Are there any existing or potential conflicts of interest?
- Might one group or organisation push for a particular approach or action so they can gain unfair advantage over others?
- Does a policy maker in a critical role have vested interests in maintaining the status quo?
- Does anyone else have vested interests that potentially give them reasons to block change initiatives?
- What is needed to avoid or mitigate potential conflicts of interest?

Tool 5: Force field analysis

Another tool that can be useful for understanding the context of your initiative is the Force Field Analysis. This is a simple, but very effective tool for identifying who will push for or against proposed changes. The example at Figure 2-3 uses the groups identified in the stakeholder map above.

Figure 2-3: Example of a force field analysis



Practitioner tip:

Dealing with challenges in analysis
Doing the analysis is likely to present some challenges. One is that you do not yet have enough information for the analysis to be sufficiently comprehensive. The way to deal with that is to do as much as you can at the start, and then go back and complete it after you have done some assessments.

Another challenge is that it can feel like you have too much information which is difficult to make sense of. This can be overcome by validation exercises in which you share your findings with others to get their feedback on whether or not they interpret the situation in the same way.

2.4 Engagement and communication with your stakeholders

There are several reasons why you need to engage with the stakeholders identified as being important in your mapping exercise. One is the need, before you start working with your partners and allies, to take time to clarify your **shared** values, assumptions, motivations, and expectations. Doing this will strengthen your discussions and identify who is best placed to take which roles and tasks. This is a good time to address issues like inclusiveness, cultural sensitivity, and gender responsiveness.

2.4.1 Types of Engagement

All stakeholders do not have to be engaged in the same way. If you have done the Interest-Influence Matrix it should give you guidance about the different levels of engagement needed according to the relevance of each individual or group of stakeholders. You will find that some might not need to be engaged much at the start, but it would be unwise to ignore or exclude any because their importance might change over time. A **stakeholder engagement plan** guides stakeholders and project implementers as to when, how and with whom consultations and exchanges should be undertaken throughout the life of the intervention. Table 2-3 sets out the different ways of engaging stakeholders.

Table 2-3: Types of Engagement with Stakeholders

Type of Engagement	How
Informing	Share information about the capacity development initiative, its objectives, timelines, and expected outcomes through briefings, newsletters, emails, or online platforms. Ensure stakeholders understand the purpose and scope of the intervention.

Consulting	Gather input on capacity needs, preferred learning formats, and challenges through surveys, interviews, or focus groups to shape the design of the capacity development program.
Involving	Engage stakeholders in the design and planning of activities, such as co-developing training modules, contributing local knowledge, or participating in pilot exercises, to ensure relevance and ownership.
Collaborating	Work alongside stakeholders in implementing capacity development activities, mentoring, or joint problem-solving exercises, enabling shared responsibility and mutual learning.
Empowering	Enable stakeholders to take the lead in delivering or adapting capacity development activities, facilitating peer-to-peer learning, or leading initiatives that strengthen competencies within their own organizations or communities.

Practitioner tip:

Be clear about the purpose of engagement
To avoid raising inappropriate expectations about the purpose of engagement and communications you need to be clear with respondents right at the start what their level of involvement will be. Anyone who thinks that they have the right to make the decisions and later finds that their ideas have not been adopted might choose not to support the initiative. If, however, they know from the start that others will make the decisions taking account of the opinions of many different groups, they will be much more likely to accept the outcome, even if it was not what they wanted.

If you can facilitate collaboration between those who are committed to the issue it not only benefits everyone through the sharing of expertise, knowledge about context, potential points of resistance, lessons learnt and other resources, it also extends the scope of influence and potential impact.

2.4.2 How to Communicate with your Stakeholders

As your stakeholder engagement plan takes shape, you will need to consider how to communicate with your stakeholders. Effective communication is essential throughout the capacity development intervention as a means to keeping your stakeholders engaged.

Communication methods and tools are evolving rapidly. This means that these developments need to be taken into account when thinking about how to communicate with different stakeholder groups. Younger participants may be more responsive to digital and social media platforms, while some groups, such as Indigenous Peoples or older persons, may have limited access to, or prefer not to use, newer technologies. For these stakeholders, face-to-face interaction or traditional media may remain the most effective means of engagement. Table 2-4 below gives some examples of the different ways communication challenges for stakeholder groups might be overcome. Effective communication is about building the support and developing coalitions for capacity development that cannot be achieved through one-way communication. That means the purpose is not simply to deliver a message but to open a dialogue, where everyone can share their goals, hopes and concerns about the initiative. **Those leading the process need to be good listeners.**

Developing or framing your message means creating something that is persuasive and meaningful **according to the intended audience.** What will work for a senior politician is very different to what will work for a subsistence farmer on the edge of poverty. Key points to remember are:

- Frame your message differently for each type of target audience;
- Keep your communication simple, direct, and consistent;
- Pick the right time;
- Remember it is better to have a few key points well delivered than too much information swamping the main message;
- Let resistance surface so you can understand what and where it is;
- Keep your message positive while acknowledging the realities of your target audience; and,
- Give practical examples the audience can understand and relate to.

Delivering the message involves selecting the methods and tools most likely to achieve the desired impact. Table 3-3 provides an overview of various communication methods and indicates which stakeholder groups each may be most effective for.

Table 2-4: Different ways to deliver a message

Communication method	Best for
Lobbying can be formal – through letter writing, scheduled meetings, invitations to events; or informal – using all opportunities to get the message across with the purpose of having direct influence on decision-makers. Particularly relevant for political factors in biodiversity action. **Or engaging an influential spokesperson** who can put positive pressure on decision-makers and raise awareness within wider groups of stakeholders.	Politicians or other high-level decision-makers who can influence policy
Mobilising demand and public opinion through activities like workshops and meetings where the target communities most directly involved in a biodiversity issue or need can make their views known in public.	Used with the general public or large groups to influence decision-makers

Traditional media like television, radio, and the press are still the best way to reach some sections of society. They can also play a significant role in advocacy, through influencing decision-makers directly or through changing public opinion on an issue.	General population, especially those in rural areas Decision-makers
Leaflets and newsletters especially if attractively designed can get the message across. But printing and distribution can be expensive and given so many people now use technology for communications, so printed matter may not now be as cost effective as previously.	Large groups of general population
Exposure visits to places that can demonstrate good practice to implementers, or to show the realities and full extent of the need, challenge, or issue to decision-makers	Implementers or decision-makers
Social media such as Snapchat, Instagram and Tiktok can be used for advocacy and awareness raising especially when set up to engage audience response and participation.	Young people (note: Facebook is used more by older people than the young)

Reinforcing the message is essential, because it is very rare for anyone to be persuaded to adopt change and act differently on the basis of only one exposure to a new idea. Sometimes people need to hear an idea many times, or in many different ways, before they are fully persuaded. Changes in organisational systems or personnel can also mean that messages get lost or need to be adjusted over time. This reinforces the need to treat engagement and communications activities as ongoing needs rather than one-off events.

Table 2-5: Ways of adjusting communications to specific target stakeholder groups

Group	Communication challenge	Ways to overcome
Women in some social groups	In some contexts women do not have a voice because only men are allowed to speak in public. Women might be afraid to speak or assume a male questioner will not listen and value their input	Have women only groups facilitated by women
Senior government ministers-policy makers	Inaccessible to lobbying, too busy for long, detailed conversations or to read long documents	Brief their advisors on the issues. Prepare short briefing papers on the key points you need to communicate
Societies and groups with an oral tradition	Written media is ineffective and a waste of resources	Create interesting audio-visual materials that are accessible and easily understood

Youth groups	Do not want to listen to older people, or have been conditioned not to speak when elders are present	Use peer communicators and popular social media influencers to get the message across

Practitioner tips:

Chose who should deliver carefully
Remember that good communication is not only about how to communicate, but who should lead the process. Without the right sort of person leading the communication the target audience might not listen.

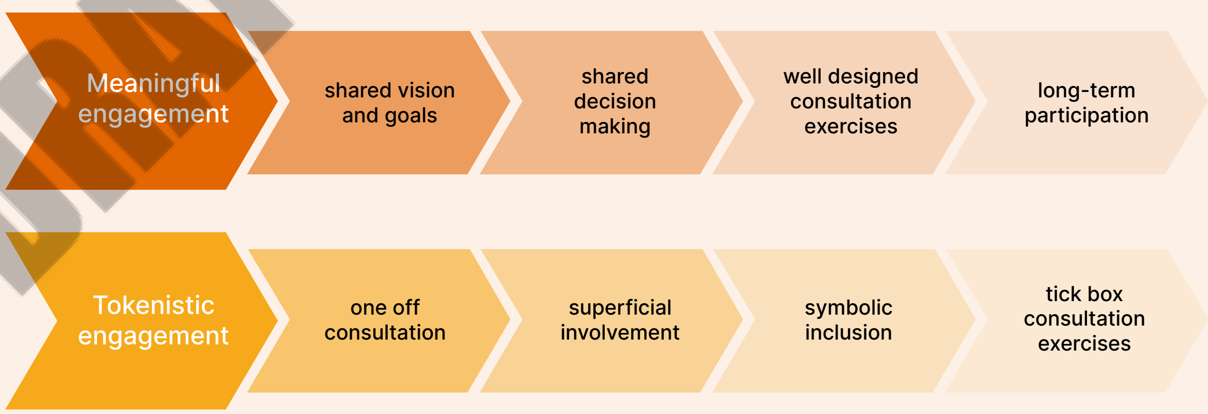
In summary, it is really important to know:

- How the intended target audience receives, consumes, and conveys information, i.e. what format are they most likely to use or accept; and,
- Who they are most likely to listen or speak honestly to.

2.4.3 How to Maintain Stakeholder Engagement

Some stakeholders will be involved all the way through, others might only need to be active for part of the process. As the work progresses the people involved might change, maybe an ally in a key post is replaced with someone new who has different ideas, or more groups of people need to get involved. The best way to keep your key stakeholders engaged is to make sure their involvement is meaningful, rather than token. The differences are shown in Figure 2-4 below. The indicators of tokenistic engagement should be viewed as red flags for something that needs to be changed.

Figure 2-4: The differences between meaningful and tokenistic engagement



Some mechanisms that make engagement durable are:

- **Institutionalisation:** embedding stakeholder roles in policies, governance structures, or NBSAP processes
- **Capacity support:** building stakeholders' skills and resources to participate effectively
- **Partnership agreements:** MOUs, co-management structures, long-term collaboration platforms
- **Feedback loops:** mechanisms for stakeholders to monitor progress and hold implementers accountable
- **Participatory monitoring:** stakeholders involved in tracking results and shaping adaptations;
- **Resource allocation:** ensuring budgets explicitly support continued engagement (e.g., community liaison roles, facilitation funds);
- **Ensuring inclusivity and equity over time:** addressing barriers that limit participation of women, youth, and IPLCs; Recognizing and respecting diverse knowledge systems (including traditional and indigenous knowledge); power-sharing mechanisms such as rotating leadership, community representation in decision-making bodies; and building trust through transparency, regular communication, and recognition of contributions.

2.5 Working with Partners

This guide defines partnership as:

> *An ongoing collaborative relationship between or among organisations from different stakeholder types aligning their interests around a common vision, combining their complementary resources and competencies and sharing risk, to maximize value creation towards the GBF goals, and deliver benefit to each of the partners.*

Working in partnership calls for different types of relationships and engagement, which need time and skill to manage if they are to create maximum effectiveness and benefit for all. The final part of this module therefore looks at partnerships and offers some practical guidance, especially for working with external partners. (Networks, alliances, allies, consortia and coalitions are all negotiated relationships between different entities and individuals working together. The principles and practices discussed here are applicable to all.)

Box 2-4: Power in partnerships

The word partnership implies equity, which is a foundation of good practice, but the word is often used to describe funding relationships which have a built-in imbalance of power. This guide deals with partnerships as a positive approach to implementing and extending successful biodiversity action in which the different contributions of each partner are treated with equal respect.

2.5.1 Lessons Learned from Successful Partnerships

Learning from practice has shown that partnerships succeed when they are:

- **Deliberately negotiated:** rushing or bypassing clarification leads to breakdown.
- **Adapted for scale:** going national or regional requires careful adaptation, not copy and paste.
- **Supported:** communication and coordination structures (e.g., learning exchanges, secretariats, regular check-ins) are in place.
- **Balanced:** respect for what each partner brings (resources, expertise, context)
- **Nurtured:** the partnership relationship itself (trust, respect, shared learning) is as important as the technical work.
- **Learning-oriented:** time and space for reflection and knowledge-sharing are built in.

Don't forget: Partnerships evolve over time and it is important to review arrangements regularly.

2.5.2 How to Establish, Nurture and Sustain Partnerships

Considering the following points will help set up and manage your partnerships successfully.

Establish the partnership:

- Develop a clear strategy: Outline your partnership goals, desired outcomes, and how the partnership will support capacity development.
- Identify potential partners: Look for organizations with a shared vision and complementary strengths.
- Be transparent: Clearly state your purpose and values during initial meetings. Be open to questions and understand their motivations and concerns.
- Formalize the partnership: Create a formal agreement that clearly defines mutual goals, roles, responsibilities, and a shared decision-making process.
- Conduct a mutual capacity assessment: Work with your partners to understand each other's strengths, weaknesses, and capacity-building needs.

Nurture the partnership:

- Prioritize communication: Maintain open, honest, and regular communication through various channels to share updates, provide feedback, and discuss challenges.
- Build trust: Foster a safe environment for trust and psychological safety by being consistent, respectful, and transparent.
- Encourage collaboration and feedback: Create opportunities for partners to contribute ideas, and actively solicit and act on their feedback.
- Implement and adapt: Jointly implement agreed-upon capacity-building activities like training, mentorship, or workshops, and be willing to adapt roles and goals as needed.
- Focus on mutual benefit: Ensure the partnership is a "win-win" situation where both organizations gain value and achieve shared success.

Sustain the partnership

- Plan for sustainability: Think about long-term commitment and consistent funding for capacity strengthening activities, even before emergencies arise.
- Evaluate regularly: Periodically assess the partnership's progress, outcomes, and overall effectiveness, adjusting the plan as needed including an exit strategy.

Check the SDG Partnership Guidebook: for an in-depth presentation of the partnering process, the partnership formation journey and the building blocks of effective partnerships.

Box 0-4: Partners' capacity development needs

Sometimes partners require **their own capacity development** to play an effective role. Investing in partner capacity strengthens the whole partnership. Examples: training local NGOs in project management, supporting Indigenous groups to navigate legal frameworks, strengthening scientific institutions to contribute to ABS

Practitioner tips:

Don't just ask "What can this partner contribute?" but also ask "What do they need to contribute effectively?"

2.5.3 Practitioners Partnership Checklist

Working through the questions in this checklist can help you with all stages of your partnerships, especially getting the set up well so that they work successfully.

Table 2-6: Partnership checklist for practitioners

Establishing the partnership	
Question	**Your answer**
Set up • What is the purpose of this partnership and how it will contribute directly to biodiversity capacity outcomes? • What are the advantages of partnership vs. other approaches such as contracting, networking, etc.? • Which types of partners are needed (see table above)? Who are the possible options?	
Partnership structure • Who will be the agreed lead agency? • Do all the partners need to know each other and work together? What will it look like – a hub with spokes or a spider web? • What is the role of external experts? How will they be held accountable for the way they work?	
Partner selection • Who has the authority to make the enabling decisions? • Who can provide financial, physical, or technical support? • Who can translate strategies into action on the ground? • Who brings scientific, technical, or traditional knowledge? • Who can contribute capacity we do not have? • Who can spread and scale results (e.g., farmer-to-farmer training[i])? For any partner under consideration: • What is their long-term vision? • What is their legitimacy in the local context? • What evidence is there of their ability to adapt and learn?	
Organisational factors Does the partnership need: • Official recognition and authorisation • A governance structure • A secretariat with staffing support If any answer is yes, describe what is needed and how it will be put in place.	

Nurturing and sustaining the partnership	
Making it work Describe how you will develop and maintain • Shared vision and purpose • Indicators of trust, respect, and mutual benefit • Negotiated and agreed roles and responsibilities according to the different contributions of each partner • Processes for routine check-in on effectiveness of working practices • Conflict resolution mechanisms • Learning and knowledge-sharing mechanisms	
Partner capacity • What, if any, additional support do any of the partners need, e.g. training, systems, resources? If yes, • What is the plan for putting that support in place?	
Exit plan • How long does it need to last? • What is the plan for when and how the partnership will end?	
Important note: It will always be more helpful and relevant to work with **local partners** whenever possible. Especially when moving to new geographies and ecosystems only local partners will have the knowledge needed for contextual adaptation, cultural relevance, and sustainability. When thinking about who to work with always ask "*Who best understands the local context and can ensure appropriate adaptation?*"	

Key Takeaways

- Identifying and mapping all the stakeholders who have will be involved or have an interest in your capacity development endeavours is an important preparatory step in planning processes.
- If you are going to build successful coalitions and partnerships for change it is essential to understand the stakeholders' perspectives and interests and how they relate not only to you, but also to each other.
- You need to approach and communicate with each type of stakeholder differently, adapting your messages and how you engage them to fit each individually.
- There are good tools available to help complete these tasks.
- Partnerships are important for success. They need to be negotiated, managed and carefully nurtured if they are to give maximum support and benefit to capacity development processes.

Further reading and resources

Documents

A very good example of continuous and expanding stakeholder mapping and engagement over multiple phases of a complex programme is given in a case study about Bhutan in the book *Capacity Development in Practice* – Ubels et al: Earthscan, London, 2010. *For downloads of the digital versions of the full publication or separate chapters,* https://www.snv.org/assets/downloads/f/191310/659e7c415d/capacity_development_in_practice.pdf

https://www.biodiversa.eu/wp-content/uploads/2022/12/stakeholder-engagement-handbook.pdf

Big Lottery Fund *Working in partnership: a sourcebook* available at https://www.tnlcommunityfund.org.uk/media/insights/documents/HtC-Partnership-Working-Learning-Paper.pdf?mtime=20190409091219&focal=none

Chambers, Robert (2003) *Whose Reality Counts? Putting the Last First*, Intermediate Technology Publications, London.

The Islamic Development Bank developed a unique method of working in partnerships called Reverse Linkage, which is an application of the South-South Cooperation approach. Reverse Linkage twins experienced entities with others needing to develop similar capacities.

The Learning for Sustainability page on partnerships lists many relevant resources, including this guide to Maximising the Impact of Partnerships for the SDGs.

The Global Water Operator Partnerships Association (GWOPA) provides an excellent example, where strong and successful water utilities mentor counterparts in developing countries. The document on learning practices in partnerships is relevant https://gwopa.unhabitat.org/resources/library/learning_approaches_in_wops_framing_the_issues_2

World Wildlife Fund: The Partnership Toolkit https://assets.wwf.org.uk/downloads/wwf_parthershiptoolboxartweb.pdf

Other resources

Changing minds – stakeholder mapping page https://changingminds.org/disciplines/change_management/stakeholder_change/stakeholder_change.htm

FAO stakeholder mapping – useful table https://www.fao.org/capacity-development/resources/practical-tools/capacity-assessment/stakeholder-mapping-tool/en/

Endnotes

[i] See for example the Food and Agriculture Organisation Farmer Field Schools focused on pest control which is an effective extension method. Interested farmers who successfully complete training as participants are later trained as facilitators to deliver the curriculum to other farmers. Peer to peer work of this type has many advantages over training delivered by external experts. The case study is available at https://openknowledge.fao.org/server/api/core/bitstreams/73c492bf-b47e-4263-ac33-df7b10e95c6b/content