



Recommendations - 2020

## Building a Successful Partnership Between Conservation and Development Organizations

### Experiences and Lessons from the CARE-WWF Alliance

#### CARE-WWF Alliance Experience around the Globe

The CARE-WWF Alliance launched globally in 2008 with an initial pilot program in Mozambique. Over the subsequent 12 years, CARE and WWF developed strategic partnerships and explored or implemented joint programming at the country level in Nepal, Peru, Madagascar, Zambia, and Tanzania. This diverse set of experiences – some more fruitful and seamless than others – offers lessons and recommendations for forming successful in-country partnerships between conservation and development organizations.

#### Core Principles for Defining a Conservation and Development Partnership

The foundation of a successful, long-term strategic partnership between conservation and development organizations is two-fold: first, a partnership of equals with explicitly linked and co-equal conservation and development objectives; and second, a commitment to work toward an integrated, long-term vision.

A *partnership of equals* means that there is no power hierarchy in the partnership – even if funding mechanisms require

an official lead and sub in practice. *Co-equal objectives* imply that both the conservation and development goals are each intrinsically valuable. Successful partnership requires that both partners understand the processes and outcomes of conservation and development as interdependent, and take responsibility for working *in an integrated way* to deliver a joint vision.

Committing to long-term, joint work *reduces transaction costs* and *increases learning* over time. When the relationship extends beyond the life of a single project, transaction costs fall and the partnership continues to mature on the foundation of sunk costs, like investments in building trust and systems. If the organizations are global networks (like CARE and WWF), the commitment to work in multiple geographies and cultures enables even more robust evidence generation and learning; this increases the ability to meaningfully integrate conservation and development processes in ways that deliver both social and ecological impact in diverse contexts worldwide.

Beyond commitment, successful partnerships reflect and require enthusiasm among key personnel in both organizations – as well as coordinated management of financial and human resources to achieve synergies and

efficiencies through delivery of linked outcomes.

#### Recommendations for Establishing a Successful In-Country Partnership

The remainder of this brief synthesizes the Alliance's partnership lessons into a stepwise process to provide a rough roadmap for non-governmental organizations (NGOs) that wish to explore establishing such a partnership (particularly between country offices in a global network, like CARE or WWF).





Each partnership will follow its own organic evolution, reflecting local culture and responding to windows of opportunity. In many cases, a successful partnership may require more than two partners, engaging with other key stakeholders in coalition due to their local trust, reach, etc. For instance, the successful Hariyo Ban program in Nepal was implemented by CARE and WWF in a consortium with two national NGOs, the National Trust for Nature Conservation and the Federation of Community Forests Nepal.

### **1. Share information to determine institutional fit and value addition.**

Before embarking on a long-term relationship with a specific conservation or development institution, reflecting on how a cross-sector partner could help your organization achieve its mission is helpful. Initial conversations between potential partners can begin with information sharing at both leadership and staff levels. The goal of these conversations is to identify the “sweet spot” where missions overlap and institutional approaches are complementary. In addition to getting to know the other institution’s mission, vision, and strategy, initial conversations can be useful to understand the compatibility of organizational values and culture.

*Pro tips:* Particularly in these early conversations, clarifying programmatic values and approaches, defining conservation and development vocabulary, and avoiding sectoral jargon and assumptions is critical to building a foundation of shared understanding and trust. Prior to taking the next step of partnership formation, both institutions should be able to articulate how the other will add strategic value to their work; this could range from specific, complementary areas of expertise to presence or willingness to work in particular geographic areas of focus. For example, CARE and WWF work on climate adaptation in key landscapes in Nepal: CARE offers expertise

in gender-sensitive vulnerability analyses and community-driven adaptation planning, while WWF adds climate analysis at the basin scale and incorporates nature-based solutions into planning processes from community to regional government scales. This complementarity also builds on each institution’s comparative advantages, including roles with other stakeholders: WWF plays a role in providing information to government for policymaking, while CARE focuses on advocacy around community rights and equitable benefit-sharing.

### **2. Coalesce around a joint vision and co-equal objectives as the foundation for integrated program design.**

Alliance experience suggests that convening a diverse cross-section of country leadership, programmatic, Monitoring, Evaluation, and Learning (MEL), and even operations teams is an important step in establishing a partnership. Devoting time to agreeing on joint values or principles as well as an integrated vision and co-equal objectives builds a shared purpose critical to integrated project design. Whether a joint program or project, taking several days to design an integrated strategy helps to clarify not only the objectives and theory of change but also a differentiation of roles and responsibilities. Even if the partnership begins with a pilot phase, consider how the approach will be scaled during the design phase to maximize the potential for impact.

*Pro tips:* Alliance experience confirms that seed funding and an external facilitator are enabling factors in a foundational visioning process. If the organizations previously worked together on a joint project, it is critical that the teams discuss what did and did not work well in that experience. In both Nepal and Peru, this approach identified rich lessons and insights that informed both partnership strategy and operational decisions. Thereafter, bringing other stakeholders into project-design phase – from powerful





## The Role of Leadership in Partnership Success

Country Directors and other leaders have a critical role in partnership establishment and management. To maximize success, their alignment and commitment to partnership is important. They can work together to:

- Send a clear and united message that the partnership is an important modality for achieving each organization's mission.
- Treat staff engaged in the partnership as a single team (e.g., normalize the idea of joint staff).
- Make joint, strategic decisions to unleash programmatic complementarity strategy and unstick operational challenges, such as misaligned policies or joint fundraising.

actors like the government to less powerful actors like local NGOs and/or communities – can be helpful to ensure that strategies are fit for purpose and to generate the buy-in and capacity necessary for later implementation and/or upscaling. Particularly if there is no in-country history of collaboration outside of their sector, the Alliance team suggests that staff gain familiarity with the other sector through a short Development and Conservation 101 training session. Ensuring that staff have some background knowledge of the other sector prior to joint planning and/or implementation may help to create the common understanding and vocabulary necessary for effective, integrated programming.

### 3. Mobilize and manage financial resources.

Leveraging the technical expertise and fundraising capacity of both institutions is critical to partnership success. Establishing a cross-organizational team of fundraisers responsible for different revenue streams to agree on and collaboratively pursue prospects may be helpful to diversify programmatic funding

sources in the long term. Leaders have a critical role to play in sending the message that the partnership is an institutional fundraising priority (see box, left).

*Pro tips:* Among fundraisers from different organizations, agreeing on how donor prospects, confidentiality, proposals, and funds will be managed serves as an important foundation for trust critical to sharing information and reaching compromises. For example, the U.S.-based Alliance Memorandum of Understanding (MoU) lays out that each organization will lead on the donors with which it has strong relationships and charge overhead only on its network's portion of costs to maximize funding for field implementation. Alliance experience also indicates that budgeting adequately for MEL – including expert staff time to drive robust methodologies and cross-site learning and sharing – is critical to maximizing the benefits of a global partnership. While such agreements and expectations are important, Alliance fundraising has also demonstrated that flexibility is key to success. For instance, to obtain donor funding, CARE and WWF have sometimes had to reduce the budget dedicated to headquarters staffing (or indirect cost recovery) inherent in a partnership of two international NGOs.

### 4. Document norms, expectations, and agreements about how the partnership will work prior to implementation.

As joint commitment to and funding for the partnership solidifies, the organizations should establish partnership processes and agreements that enable ongoing collaboration. At the country level, it is helpful to agree on an MoU through frank discussion that builds trust and makes explicit expectations between the institutions' leaders. Alliance experience suggests that an effective MoU incorporates both a statement of partnership principles as well as operational agreements about how the partnership will function.

*Pro tip:* Clarifying operational issues – such as the governance and decision-making structure, fundraising protocols, division and flow of funds, and asset management during project implementation and close-out – helps to ensure common expectations and minimize conflict from the outset. Even as donor requirements sometimes dictate operational policies, considering these issues as a partnership may enable longevity beyond the life of a single project. Where donor funds are more flexible, harmonizing policies and procedures as early as possible is advisable. Alliance experience in Mozambique and Tanzania illustrates that it may be



useful to establish a joint field office and hire a single partnership manager to drive implementation. In all cases, joint work-planning facilitates greater integration of programmatic work and enables efficiencies in institutional resource use.

## 5. Invest in relationship management over time.

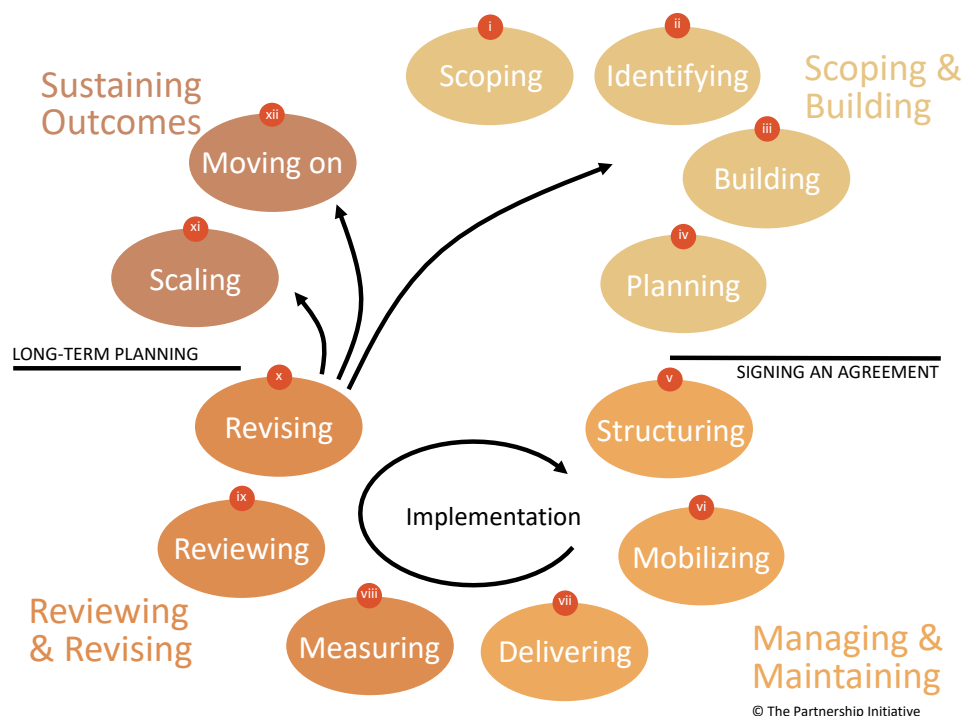
Fluid communications are critical for a functioning, long-term partnership. Integrated conservation and development programs intervene in complex, dynamic environments. Success depends on carving out regular time to reflect on monitoring and evaluation data, as well as experiential learning, in order to adjust approaches accordingly. Standing meetings at both leadership and staff levels enable regular touch points, sustain trust, and accelerate learning vital to adaptation. It is important to troubleshoot challenges and document lessons as they arise.

*Pro tips:* Limiting relationship management to project management is unwise, while investing in the broader, longer-term relationship is valuable to withstand short-term project cycles. Whether changes are programmatic or operational, it is helpful to capture decisions and their rationale in writing, through meeting notes, lesson learned briefs, or in more formal documents like updated MoUs, as appropriate. Written documents enable partners to stay on the same page and hold one another accountable for next steps; they also serve as insurance to keep trains running when staff inevitably changes.

## Maintaining an Effective Partnership

This brief offers a synthesis of key CARE-WWF Alliance lessons around how to establish a solid foundation for a conservation-development partnership. While the above is presented in a linear fashion, the process is, in fact, cyclical and iterative. Global Alliance experience indicates that, particularly when there

## Partnership Management Cycle



is turnover in partnership staff, it is important to go back to the basics. Whether extensive or light-touch, revisiting joint principles, reevaluating partnership value addition, and/or recalibrating overarching goals to align leadership can ensure that joint commitment and other foundations of the partnership remain strong. Such reviews may lead to updated goals, programmatic innovations, or new ways of structuring the partnership that better respond to the shifting context in ways that drive improved delivery, measurement, or scaling of partnership approaches and impacts.

The Partnering Initiative offers a useful visual (see diagram, *above*) for understanding this brief, which has focused primarily on scoping and

building, as part of a wider partnership management cycle. Despite the Alliance's focus on establishing long-term partnerships, not all partnerships between conservation and development organizations will last. Partners may agree to part ways if joint objectives have been met, if transaction costs begin to outweigh joint benefits, if other partners have expertise that is more fit for purpose, and/or if funders choose not to sustain their initiatives. One thing is certain: As organizations and their complex operating environment inevitably shift, it is essential to be adaptive and responsive to local culture, strategic windows of opportunity, and ongoing learning from experience.

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