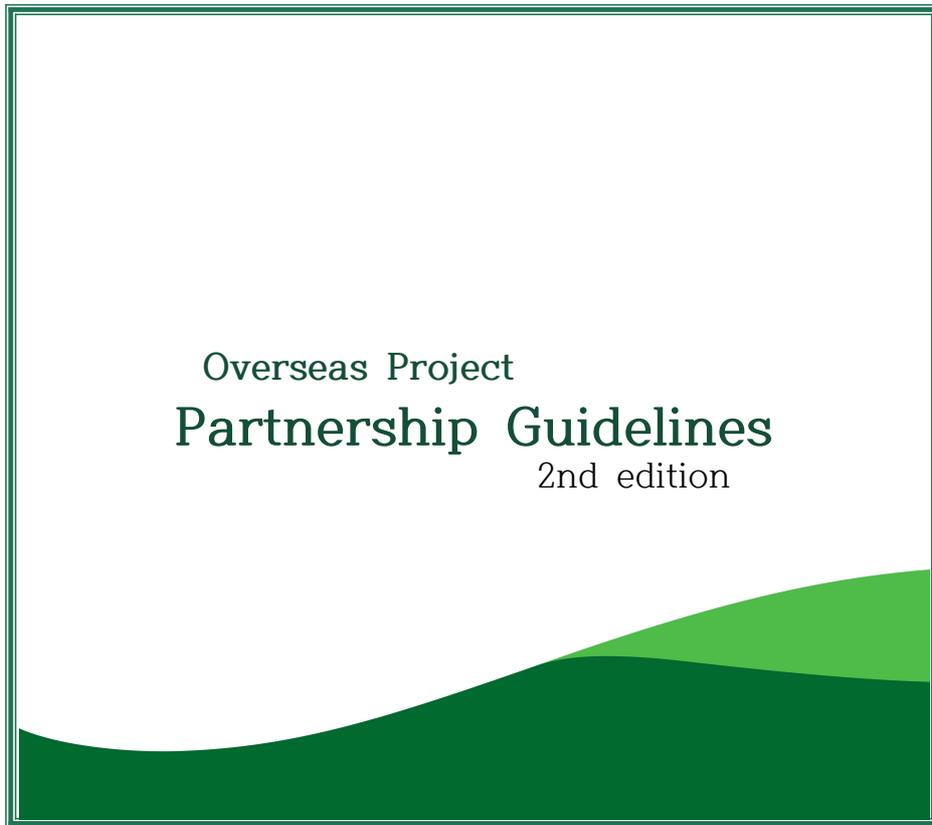


Overseas Project
Partnership Guidelines
2nd edition



July 2019

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01.

About Partnership Guidelines

1. Necessity

ChildFund Korea (hereinafter "ChildFund") has been performing projects through various partnerships since 1995, when it commenced overseas projects, until now. There has been a significant development in the ChildFund's overseas projects for the past 10 years, and the forms of the partner institutions in cooperation with the ChildFund have become diverse along with the expansion of countries where projects are performed. While the Alliance-centered partnerships were the mainstream of its overseas projects at the initial stage, cooperation with non-Alliance partners have been on the rise following the expansion of projects to countries where the Alliance partners had not yet advanced such as South Sudan, Rwanda, Malawi and Tanzania, etc. since 2012.

Like the above, the need for establishing common principles concerning partnerships has been proposed following the quantitative development of projects through partnerships and the diversified forms of partnerships, as the ChildFund has experienced the limits of performing overseas projects due to the absence of agreed standards when establishing cooperation schemes with individual partners. Also, there were some cases experiencing a lack of mutual accountability in the process of conducting projects with existing partner institutions. Therefore, there has been an increased internal demand for common principles that can prevent and respond to such situations.

On the other hand, following the recent advent of new donor countries and the rapid growth of NGOs in the southern hemisphere, various discussions continue on the role of NGOs in the northern hemisphere within the international society.¹⁾ With regard to this, the importance of having a

1) Discussions on the changing relationship between NGOs in the northern hemisphere and NGOs in the southern hemisphere and the role of NGOs in the northern hemisphere started along with the quantitative and qualitative increase of NGOs in the southern hemisphere since the mid 1960s. Such discussions took place actively centered around

sense of ownership and undertaking development centered around the southern hemisphere such as south-south cooperation, etc. were emphasized in the high-level talks organized as part of efforts to improve the development effectiveness of the international society. Also, as mutual accountability is newly emphasized for effective support and development, the international society calls for mutual accountability which considers both roles and responsibilities of NGOs in the northern hemisphere equally important, rather than the top-down accountability stressed by the existing NGOs in the northern hemisphere.

ChildFund has established the basic principles and guidelines of partnerships to improve the effectiveness, transparency and accountability of projects for it viewed the quality of partnerships and the competence of partner institutions as the key factors to achieve sustainable performances to respond to the changing internal and external environments.

2. Purpose

This document provides general elements including the definition, purpose and principle of partnerships for conducting the ChildFund's overseas projects, and offers general standards²⁾ and tools to help hands-on workers in the whole process encompassing the formation, management and termination of partnerships.

3. Application

The partnership indicated in this document includes the whole overseas projects of the ChildFund regardless of countries of projects or methods of conducting projects, and this document shall apply to the following cases when conducting overseas projects.

developed donor countries and main INGOs from 1980s to the late 1990's, and one of the most widely known conferences regarding this was 'World Development Conference on NGOs' held in 1987. There are thesis and research report as follows for further references.

- 1987, Some aspects of relations between the North and South in thd NGO sector, Charles Elliott
 - 2011, NGO Policy Briefing Paper No.4, April 2001 - NGO and Partnership, INTRAC
- 2) It was a document titled 『Directions and Basic Principles of Partnerships』 established in June 2018, and the Guidelines were established as its follow-up. Therefore, the ChildFund incorporated the above document into these Guidelines rather than left it as a separate document.

- 1) When forming, managing and terminating new partnerships in the new countries of projects
- 2) When additionally forming, managing and terminating new partnerships in the countries of existing projects
- 3) When renewing, managing and terminating partnerships to maintain partnerships with existing partners in the countries of existing projects.

It is recommended that the standards and procedures suggested in these Guidelines would be applied, and that decisions would be made in accordance with the situation and context of each country based on issues relating to projects conducted in each country, and through strategic judgment of organizations.

02.

Direction and Basic Principles of Partnerships

1. Definition of Partnership

ChildFund defines 'partnership' as follows.

Independent parties' establishing mutually beneficial cooperative relationships to achieve agreed common objectives as sharing potential risks

2. Principles and Details

Basic Principles		Details
Child-centered	Partnerships are based on common missions and visions or objectives for the best interest of children. Both parties shall respect children's rights and ensure that children's rights are realized in all activities performed through partnerships.	<ul style="list-style-type: none">• Educating children's rights• Conducting projects based on children's rights• Institutionalizing child protection policy (Safeguarding)

Basic Principles		Details
Change-oriented	Partnerships share the common objective to work for change. Both parties shall work along with children and local residents to fundamentally solve problems experienced by the local society.	<ul style="list-style-type: none"> • Clear and mutual understanding of the final objectives to be achieved through cooperative activities • Management of performances centered on the field work, monitoring and enhancement of evaluation
Sustainability	All activities performed through partnerships shall be designed and conducted in a manner that any changes brought by such activities would be sustained within the local society even after the end of intervention by both parties.	<ul style="list-style-type: none"> • Intensifying a sense of ownership through participative activities and procedures • Utilizing the existing systems of partners • Strengthening partners' capability and using local resources

Basic Principles		Details
Mutual Transparency/ Accountability	Both parties shall equally have mutual transparency and accountability. Both parties shall have an equal level of accessibility to information and decision making process required for the entire process of formation, operation and termination of partnerships, and shall share responsibility and risks for all activities based on partnerships.	<ul style="list-style-type: none"> • Enhancing access to all information regarding activities • Enhancing the management of accounting • Enhancing the transparency of resources (Clear guidance on conditions and details of support) • Enhancing mutual evaluation • Enhancing communication platforms (Introducing procedures for gathering and handling difficulties)
Mutual Respect	Partnerships shall be based on the independent status of and equal relationship between both parties. Both parties are complementary to each other and they shall be developed through mutual learning as sharing experience and lessons acquired from the partnership.	<ul style="list-style-type: none"> • Mutual respect for missions, values and principles of both parties • Sharing knowledge and enhancing mutual learning • Promoting capacity building between partners and measuring improvement process

3. Partnership Types

ChildFund's partnerships are categorized into two types, which shall be formalized through the formation of a partnership or conclusion of an agreement. The categorization of partnership types is determined by the

strategic judgement of ChildFund, and there are different selection and management processes for each type of partnership.

[Table 1. Categorization of Partnership Types]

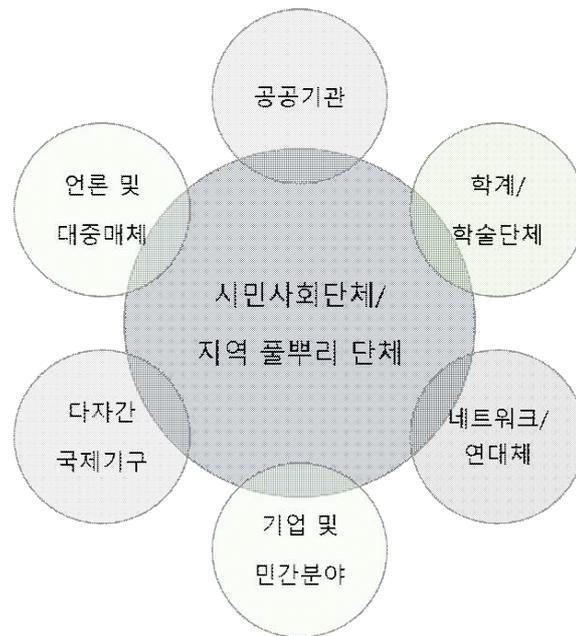
Category 3)	Definition	Cooperation Forms (or Methods)
Tier 1	Cooperative relationship to achieve the agreed short-term project/activity outcome (Examples: Partnerships cooperating with partners in various forms such as medical camp, telethon, donors' visit and advocacy campaign, etc.)	Financial support Technical support Sharing knowledge and manpower (sending employees on secondment)
Tier 2	Cooperative relationships to achieve the agreed medium/long-term program outcome (Examples: Performing medium/long-term programs for integrated local development through cooperation with partners in the project region selected based on the strategic judgment of ChildFund.)	Mutual capacity building activities, etc.

Partnership levels vary depending on whether the form of a cooperative relationship with the partner is designed to conduct projects/activities with short-term outcomes or programs with medium/long-term outcomes. It shall be determined strategically based on the judgment of ChildFund considering its direction and the capacity of the partner during the process of researching and analyzing the partner (see pages 8-15). However, types of all partnerships may change over time or be influenced by changing internal/external environments. Therefore, the level of partnership itself does not carry a lot of significance, but it is important to make stakeholders of the partnerships to focus on the agreed projects and activities to achieve intended outcomes through partnerships.

4. Scope of Partnerships

3) In 『Direction and Basic Principles of Partnerships』(06.2018), partnerships were categorized into Project/activity/Initiative Partnership and Strategic Partnership, however these terms have been changed into Tier 1 and Tier 2 due to the opinion that there might be much confusion over the terms as the terms are not intuitive.

ChildFund may pursue cooperation with various forms of partners. Below is the categorization of main institutions generally in cooperation with ChildFund. In this document, the scope of partners shall be limited to 'in-country' activities or partners engaging in activities.



- Civil society institutions: This is the main form of institutions ChildFund forms partnerships with and it refers to private nonprofit institutions such as international nonprofit institutions, local nonprofit institutions and local alliances, etc.
- Community based institutions and associations: It refers to groups organized independently by local residents such as female groups, PTA or associations, etc.
- Public sector and institutions: It includes the governments, local governments, relevant departments and institutions of countries where projects are conducted.
- Academia and research institutions: It refers to universities, research institutes and various academic societies and research groups.
- Multilateral international bodies: It is possible to cooperate with multilateral international bodies such as UN agencies and World Bank, etc. in accordance with the project activities to achieve specific

objectives.

- Press and mass media: It refers to broadcasting companies, radio and newspapers, etc. and ChildFund may cooperate with them to perform specific activities (various events and campaigns, etc.)
- Private sector: It includes multinational corporations, small/medium-sized corporations and business entities in private sector acting in line with the missions and principles of the ChildFund's programs, which advance to or operate in countries where ChildFund conducts projects
- Networks/alliances: A form that requires cooperation of multiple institutions to achieve common objectives, and it is generally formed for the purpose of conducting advocacy activities or sharing knowledge.

However, ChildFund shall not cooperate with the following partners:

- Entities in violation of the United Nations Convention on the Rights of the Child (UNCRC) - Examples: entities that are involved in the violation of the rights of the child or that condone child labor
- Entities in conflict with the authorities of the organization or related to goods, services or activities that harm the activities and reputation of ChildFund.

5. Cooperation Methods for Mutual Growth

ChildFund can offer 3 types of support to partners including both financial support and non-financial support (technical support, advice, network and branding, etc.) depending on the objectives and circumstances of partnerships and the competence of partners, etc.

	Cooperation Types	Examples of Cooperation Methods
ChildFund → Partners	Supporting programs and projects performed by partners	<ul style="list-style-type: none"> • Providing human/material resources to partners as well as program opportunities through connections • Supporting enhancement of partners' capacity from the program aspect
	Supporting advocacy or networks	<ul style="list-style-type: none"> • Enhancing the effectiveness of advocacy activities and the bargaining power of partners by participating in the child issue advocacy activities of partners and using the resources of ChildFund. • Improving the accessibility of partners to knowledge/information by supporting the creation of opportunities and establishment of systems.
	Enhancing (systematic) capacity of partners	<ul style="list-style-type: none"> • Providing education and training to enhance the organizational capabilities, and financial/non-financial support to establish systems, etc. (However, support should be partner-oriented to discourage an increase in their dependence on ChildFund.)

Generally, partners can offer the following support to ChildFund.

	Cooperation Types	Examples of Cooperation Methods
	Partners → ChildFund	Providing expertise
Providing support in the field		<ul style="list-style-type: none"> • Conducting projects in the field based on the agreed objectives • Providing cases where onsite projects were supported in relation to fundraising and promotional activities of ChildFund, or where children were supported • Supporting the preparation for a visit to the site and the performance of onsite activities • Supporting the ChildFund's employees with safe access to troubled or disaster areas, and providing safety information at the site

ChildFund may try various forms of cooperation with partners such as a regional exchange with partners to share knowledge, enhancement of business efficacy and accumulation of experiences through collaborative planning of multinational projects and research, and provision of human resources through sending employees and volunteers of ChildFund to local regions on secondment, etc. with an aim to improve business efficacy other than to conduct basic partnership project activities. However, cooperation methods should be applied differently depending on the situation of countries, the resources and competence of partners and the nature of projects, etc., which should be comprehensively considered when determining cooperation methods.

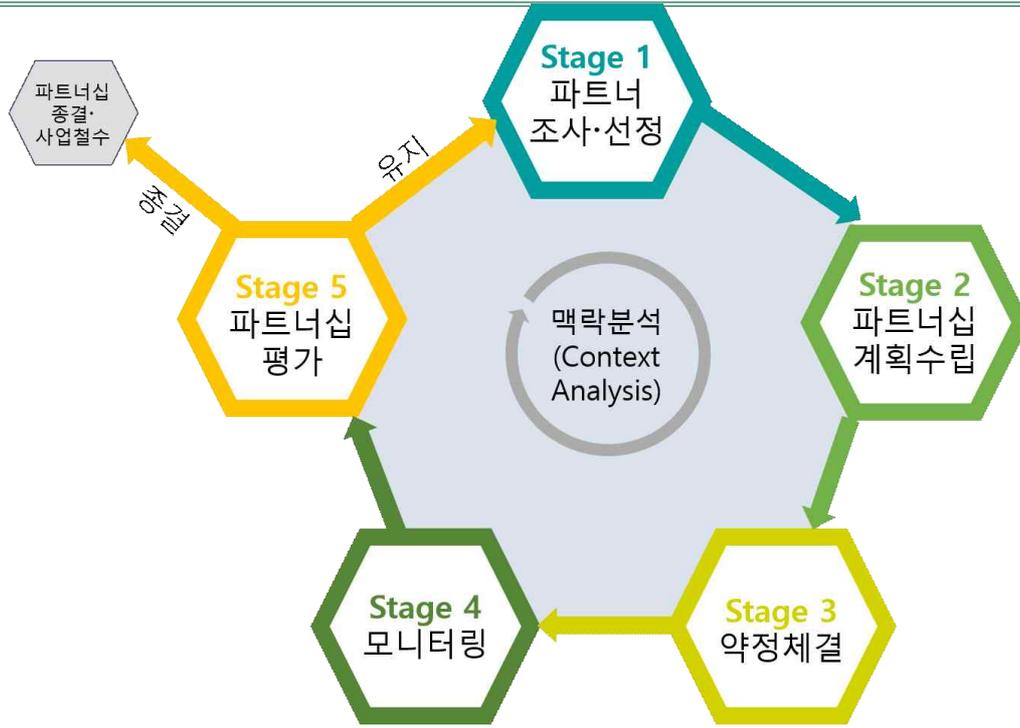
03.

Formation and Management of Partnerships

Formation, management and termination of the ChildFund's overseas projects partnerships shall be processed through the following stages. The same cycle shall apply not only to the formation of new partnerships but also to the maintenance of existing partnerships (See Image 1. Partnership Management Cycle).

New partners can form certain types of partnerships as defined in Tier 1 only, but may adjust their level of partnership to Tier 2 depending on the results of partnership evaluations and strategic decisions after 3 years since the conclusion of the partnership agreement. Specific procedures or details in some stages are different depending on the level of partnership. However, the details of each partnership in the same level may differ as a partnership itself is much affected by the environment. Therefore, continuous context analysis needs to be conducted in each stage by country, situation and partner, and it is important to reflect them in partnerships.

[Image 1. Partnership Management Cycle]



Stage 1 파트너 조사, 선정:partner assessment and Selection

Stage 2 파트너십 계획수립:Establishment of Partnership Plans

Stage 3 약정체결:Conclusion of Agreements

Stage 4 모니터링:Monitoring

Stage 5 파트너십 평가:Evaluation of Partnerships

(Left)종결/유지(Right): Termination/Maintenance

파트너십 종결, 사업철수: Termination of Partnerships, Project Withdrawals

Stage 1. partner assessment and Selection

1. Introduction

This is a stage where ChildFund selects candidates for partnerships by exploring partners to cooperate with and collecting information on/from them. ChildFund starts with mapping various stakeholders within the countries based on its project desire and collecting information on them, and then performs in-depth research on the candidates before reaching an internal agreement on which institution would be the suitable partner(candidate).

2. Detailed Tasks

A. Stakeholder Mapping	B. Partner Assessment	C. Partner Selection
Collecting information on Stakeholder and selecting candidates for partners	Conducting research on candidates for partners	Selecting the final partners for cooperation

A. Stakeholder mapping

ChildFund shall explore candidates for partners related to the potential project areas and project regions selected by ChildFund through document search to map out candidate partners for the potential project areas in the project region desired by ChildFund. Most of public institutions have their specific jurisdictions and roles, and have information on institutions operating within their jurisdictions, therefore ChildFund can obtain information on civil society networks or private institutions' associations, etc. in the regions and the countries. Such information can be a starting point for mapping out candidate partners. ChildFund can obtain information on civil society networks or private institutions' associations, etc. in the regions and the countries through the above, which can be a starting point for finding potential candidate partners. Also, ChildFund shall acknowledge that candidate partners explored at this stage could be a cooperation partner someday, and a link to understanding the

characteristics of civil society within the country or to participating in the networks within the country in the future before undertaking the assessment. [Tool 1. Stakeholders' list]

B. Partner Assessment

After narrowing down candidate partners that can cooperate with ChildFund through mapping stakeholders, it shall conduct an assessment by visiting the candidates and their workplace. When visiting the candidates for an assessment, it shall visit the workplace if possible, and organize key practitioners considering the securing of transparency and accountability. ChildFund shall send an official assessment consent form in its name prior to conducting assessments on the candidates. [Tool 2. Letter of intent]

Candidate partner assessments contain the following items. [Tool 3. Partner assessment]

While all items shall be assessed for Tier 2 partnerships, items selected by the prior agreement of assessors only shall be assessed for Tier 1 partnerships. However, it is necessary to assess all items if switching Tier 1 partnerships to Tier 2 partnerships.

ChildFund shall score the competence of the candidates for each assessment item through interviews and document review when visiting the candidates, and shall record descriptions of any details to use them for analysis.

Assessment Items	Details	Subject	References
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Assessment Items	Details	Subject	References
I. Governance	1. Institution's Vision, Missions and Values	Common	<ul style="list-style-type: none"> • Statement of visions, missions and values • Articles of Incorporation • Registration certificate • BOD's Terms of reference • BOD's minutes • Child safeguarding policy
	2. Institution's Legal Status	Common	
	3. Composition of the Board of Directors (BOD)	Common	
	4. Leadership Composition and Succession Plan	Tier 2	
	5. The Existence of Child safeguarding policy	Tier 2	
II. Administration	1. Organizational structure	Common	<ul style="list-style-type: none"> • Personnel management guidelines and manuals • Administrative document forms
	2. The existence of the management guidelines and documents. Types of management systems and application methods	Tier 2	
	3. Methods of data storage and its use	Tier 2	
III. Human Resources	1. Manpower status and personnel management methods	Tier 2	<ul style="list-style-type: none"> • Personnel management plan • Personnel management guidelines and manuals • Job descriptions • Reward system • Job takeover materials • Employee evaluation materials
	2. The existence of job descriptions and methods of supervising employees	Tier 2	
	3. The existence of personnel management policy	Tier 2	
	4. The existence of the employee training system	Tier 2	
	5. The existence of reward and welfare systems for employees	Tier 2	
	6. Methods of using volunteers (or internships)	Tier 2	

Assessment Items	Details	Subject	References
IV. Financial Management	1. The existence of accounting policy and job manuals	Common	• Accounting manuals
	2. The existence of accounting internal controls	Tier 2	• Accounting records
	3. Methods of retaining accounting documents and materials	Tier 2	• Payment voucher
	4. Budget plan and its sustainability	Tier 2	• Delegated items • Accounting reports
V. Organizational Management	1. Organizational management strategies	Common	• institution management strategies
	2. The existence of resource mobilization plans	Tier 2	• A list of stakeholders
	3. The existence of communication strategies	Tier 2	• Resource mobilization plans
	4. Internal decision making structure and methods	Tier 2	
	5. Organization's knowledge accumulation and management	Tier 2	
VI. Program Management	1. (For the last 3 years) General programs/projects (region, number, subject and sector, etc. of programs)	Common	• Program guide • project reports
	2. Community engagement strategies	Common	• Agreements with other institutions
	3. Monitoring and Evaluation of Performances and project Quality Assurance	Common	• M&E reports • Community engagement strategies

The common items among the above assessment items are the basic information and essential assessment items required for forming overseas projects partnerships of ChildFund. Even if they are cooperating institutions to perform short-term activities or simple projects, they must be assessed on the common items for Tier 1 Partnerships at the stage of selecting institutions. However, if ChildFund is unable to visit institutions for research due to unavoidable internal/external circumstances, the relevant

institutions can conduct a self-assessment and submit the results in writing, provided that there was an internal decision on this beforehand. The self-assessment form is identical to Tool 3. Partner Assessment, and ChildFund shall provide the partner institutions with specific and detailed guidelines so that they can conduct a self-assessment of their competence with clear understanding of its content.

ChildFund shall not force partner institutions to take on items they may feel sensitive about sharing, and shall also be mindful of how it communicates with them so as not to give any unnecessary expectations of guaranteed partnerships in the future. Any items that can be confirmed in writing shall be assessed by requesting additional materials on them to reduce fatigue resulting from taking assessments.

Partner assessment stage is not a procedure where one institution explores the possibility of forming a partnership with the other in an unilateral manner, but it is an initial process where both institutions find out about each other and explore the possibility of cooperation, therefore, ChildFund shall give sufficient explanations to the other institution about itself and the purpose of and reason for exploring partner institutions. Hence, ChildFund personnel's facilitation role to properly guide discussions in the process is important for having a better understanding of each other by letting the other institutions to ask questions about ChildFund or to share what they expect from partnerships, etc. ChildFund shall clearly provide the future plans and procedures to the other institutions to prevent their expectation or frustration.

It is also very important to double-check or verify information collected by conducting partner assessments afterwards. Especially, in case of new projects largely influenced by the competence and experience of the partner, ChildFund shall verify whether the materials and information provided by the partner have substance. It is also advisable to carry out a reference check with a third party who has experience of directly working with the relevant institution, if possible.

C. Partner Selection

Upon completion of assessing candidate partners, ChildFund shall prepare a

partner assessment result analysis report based on the data obtained through assessments. The Partner Assessment Results Analysis Form mainly consists of the comparison of the current status of assessed institutions, the assessors' assessment results analysis, the possibility of cooperation with ChildFund or suggestions for cooperation methods. The report shall be prepared after sufficient discussions among people who conducted partner assessments together to ensure the objectivity of their analysis. [Tool 4. Analysis report of new candidate partners assessment results, Attachment 1.SWOT Analysis Template]

ChildFund shall strategically decide the institutions to cooperate with based on the analysis by personnel who conducted partner assessments, and the final decision shall be made following the approval by delegated authority.

Upon selecting partners, ChildFund shall send a letter containing the selection results and its appreciation to the other institutions. In case that they are not selected as partners, ChildFund shall send a letter clearly stating the reason why they were not selected as well as its appreciation for their cooperation with the assessment, and in case that they are selected as partners, it shall send a letter containing a message of appreciation and brief information regarding the future plans in the name of the head of Global Program Division. [Tool 5. Letter of appreciation]

3. Personnel and Roles

Personnel	R&R	Detailed Tasks
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Key Practitioner	Project Manager	Preparing and conducting partner assessments	<ul style="list-style-type: none"> • Mapping stakeholders • Selecting institutions subject to the assessments • Sending an email containing the assessment consent form • Adjusting schedules for visiting institutions • Organizing the assessment questionnaire (Common) • Conducting assessments on institutions (Deputy) • Reviewing the institutions' materials • Analyzing the results of assessments on institutions (Deputy)
	Partnership Manager (Project Team)	Conducting assessments on partner institutions and analyzing the results	<ul style="list-style-type: none"> • Selecting potential institutions for assessments • Organizing the assessment questionnaire (Common) • Conducting assessments on institutions (Principal) • Reviewing the institutions' materials • Analyzing the results of assessments on institutions (Principal) • Preparing the assessment report • Sending an email containing the selection results
	Partnership Manager (Planning Team)	Reviewing Partner assessment process and giving opinions	<ul style="list-style-type: none"> • Reviewing the institutions' materials and giving opinions • Reviewing the assessment report and giving opinions

Decision Maker	Project team leader- Head of Department- Head of Division	Conducting partner selection	<ul style="list-style-type: none"> • Reviewing the assessment report • Conducting final selection of cooperation partners
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In order to ensure the objectivity and accountability for partner assessment and selection process, each key practitioner team shall be composed of 3 persons. Although it is possible to flexibly adjust the support manpower and their roles depending on the manpower composition and business situation of each team, it is recommended to designate a person in charge of partnerships who would continue to perform its role as a supervisor of partnership management to build up expertise and continuity in managing the partnerships of ChildFund.

Stage 2. Establishment of Partnership Plans and Agreement

1. Introduction

This is a process of planning and agreeing on how to set the scope of partnerships with the relevant institutions after selecting them as partners, which shall be determined through discussions between both parties from project operation plans to performance management plans. It shall be used as an attachment to the partnership agreement at a later stage.

2. Detailed Tasks

Establishing partnership plans
Partnership road map Capacity building plans Partnership M&E plans

Partnership plans shall be established through discussions with the partners, which shall consist of the following components. [Tool 6. Common work plan]

Components	Examples of Detailed Processes
Partnership Road Map	<ul style="list-style-type: none"> • The purpose and objective of partnerships • The definition of scope and form of partnerships • Activity plans and schedules for partnerships • Considerations for partnerships • Conditions and procedures for terminating partnerships
Capacity Building Plans	<ul style="list-style-type: none"> • Capacity building plans for both parties, ex) capacity building concerning new projects or projects where new technologies are applied, plans for sending employees on secondment, participating in the parties' workshops, a field trip to the workplace of both parties and training plans by inviting advisors in the project sector, etc.
Partnership M&E Plans	<ul style="list-style-type: none"> • Partnership monitoring plans • Partnership evaluation plans

► **General partnership plans**

The ChildFund shall establish plans such as the period, form, scope and budget of a partnership through mutual discussions between both parties based on the purpose of establishing the partnership and main outcomes expected from it. ChildFund may omit the above process if no mutual agreement is required as the scope of the partnership, the period and activities of projects to be operated through the partnership and its budget, etc. are already clearly specified.

► **Capacity building plans**

Local partners hope not only to simply receive material support but also to grow into a more independent and influential institution in the community than before by building their capacity through partnerships.⁴⁾ ChildFund agrees that promoting sustainable growth of the partners is an important role and responsibility of INGO, therefore it considers capacity building as a necessary element of partnerships. However, one-sided capacity building may cause an imbalance of power or a conflict in partnerships. Therefore, it is important to continuously explore and use mutual capacity building opportunities. Therefore, both parties shall establish capacity building plans by learning from one another and discussing activities that would build the capacity of each party. However, the above process may be omitted by mutual agreement between the parties if it is deemed that both parties have more than the required level of capacity, or time and cost required for capacity building exceeds the period and budget of the project. If the parties plan capacity building activities but as part of an individual project, the project plan needs to contain capacity building plans. (See details of Capacity Building in Page 24)

► **Partnership M&E plans**

Partnership M&E is a process where both parties are mutually inspecting the partnership itself separate from Project M&E, and it includes rough plans for monitoring and evaluation schedules and performance methods. (See details of Stage 4 Monitoring in Pages 22~27)

3. Personnel and Roles

4) NGO Partner Survey 2010, Keystone Accountability

Roles	Personnel	R&R	Detailed Tasks
Key Practitioner	Project Manager	Establishing partnership plans	<ul style="list-style-type: none"> Establishing and sharing partnership plans
	Partnership Manager (Project Team)	Reviewing partnership plans (Principal)	<ul style="list-style-type: none"> Reviewing partnership plans and giving opinions
	Partnership Manager (Planning Team)	Reviewing partnership plans (Deputy)	<ul style="list-style-type: none"> Reviewing partnership plans and giving opinions
Decision Maker	Project Team Leader- Head of Department- Head of Division	Approving partnership plans	<ul style="list-style-type: none"> Reviewing and approving partnership plans

As partnership plans will become the basis of projects to be conducted in the future, project manager of the relevant country shall take a lead in preparing draft plans by communicating with the partners, and shall establish the final partnership plans by listening to opinions of the person in charge of partnerships in the relevant project team.

Stage 3. Conclusion of Agreements

1. Introduction

This is a stage where both parties mutually agree to the partnership and secure public confidence in the same by signing a Memorandum of Understanding based on the scope and plans of the partnership determined at the previous stage.

2. Detailed Tasks

Conclusion of Agreements
Preparing a draft Memorandum of Understanding (MoU) Feedback by partners Concluding the agreement

► Conclusion of Agreements

ChildFund shall prepare a MoU based on the basic MoU form by reflecting the partnership plans agreed at Stage 2. Although the period of Tier 1 Partnerships is not specified in the MoU, Tier 2 Partnerships shall be guaranteed at least 5 years of the partnership period to assure the stable performance of programs for they are established to perform medium/long-term programs. When concluding a Memorandum of Agreement or a Project Agreement based on the Partnership MoU, ChildFund shall put limits on the period and budget of the project by partnership type.

Partnership Type	Partnership Period	Project Agreement
Tier 1	Not specified.	<ul style="list-style-type: none"> • Partnerships can conduct only a one-year project if it is their first project with a budget less than 100M Korean Won. • Partnerships can conduct a multi-year project from their second project without any limits on the size of the budget.
Tier 2	5 years	<ul style="list-style-type: none"> • Partnerships conduct a five-year project as their first project without any limits on the project budget. • Partnerships continue to conduct five-year projects from their second project onwards.

The longer the period of cooperation with the partner is, the greater your understanding of the partner will be, which enables ChildFund to consider a more extensive medium/long-term project with the partner based on their experience and trust so far. Therefore, as there is no need to aim for medium/longer cooperation from the start, the parties shall sign the MoU that contains extensive and general issues. However, if the parties intend to switch their partnership from Tier 1 to Tier 2, they shall execute the new agreement reflecting more details of cooperation and mutual responsibilities and roles so that they can prepare the basis of stable performance of a medium/long-term project. [Tool No.7 Memorandum of Understanding]

It is not necessary to execute a project agreement simultaneously with a partnership agreement, and a project agreement may be executed flexibly considering the circumstances. In respect of any matters concerned with the execution of a project agreement, ChildFund shall refer to the overseas project job manuals and the relevant forms.

3. Personnel and Roles

Roles	Personnel	R&R	Detailed Tasks (Draft)
Key Practitioner	Project Manager	Preparing the partnership agreement (Deputy)	<ul style="list-style-type: none"> • Feedback on the agreement
	Partnership Manager (Project Team)	Preparing the partnership agreement (Principal)	<ul style="list-style-type: none"> • Preparing the draft agreement • Collecting feedback on the agreement • Preparing the execution of the agreement • Reporting the results and preparing draft plans
Decision Maker	Project Team Leader- Head of Department- Head of Division	Executing the partnership agreement	<ul style="list-style-type: none"> • Reviewing the MoU • Signing the agreement

Although it is possible to flexibly adjust the persons in charge and their roles depending on the manpower composition and business situation of each team, it is recommended that the person in charge of partnerships in the relevant project teams takes a lead in execution of the partnership agreement in order to ensure the management of the partnership by the organization itself.

Stage 4. Monitoring

1. Introduction

This is a stage where the project is conducted through the actual partnership based on the terms and conditions of the agreement. The parties shall continuously enhance the capacity of the partnership by conducting previously planned capacity building activities during the period of the project, and inspect the progress of the project and the partnership through joint monitoring.

2. Detailed Tasks

A. Joint Monitoring	B. Capacity Building	C. Conflict Management
Conducting monitoring in accordance with the cycle based on partnership type	Engaging in mutual learning through capacity building activities	Managing conflicts at all times to improve and enhance the partnership relationships

A. Joint Monitoring

ChildFund shall monitor partnerships pursuant to M&E plans to ensure accountability and mutual learning. This process is to monitor the partnership itself separate from monitoring the project or activities of the partnership, and it is a process to review whether the partnership is being developed pursuant to the existing plans and objectives. In case of any problems, ChildFund shall immediately rectify the existing partnership plans and reflect them in the partnership.

When monitoring the partnership, both parties shall have partnership review meetings to inspect the progresses made compared to the partnership plans, and to honestly discuss issues that need improvement and to devise improvement methods accordingly. In this process, ChildFund shall listen to the project manager's opinions in respect of the project performed based on the partnership through its internal meetings. ChildFund may arrange a visit to the workplace if absolutely necessary, however it shall refrain from doing so for the purpose of monitoring the partnership only.

Partner Type	Monitoring cycle	Monitoring methods
Tier 1	Once a year	<ul style="list-style-type: none"> • Partnership review meetings (via Skype, in writing or visit, etc.) • ChildFund's internal meetings (Listening to the project manager's opinions) • Visit to the workplace (Optional)
Tier 2	Once every 2.5 years after the execution of the agreement	

Tier 1 Partnerships shall be monitored once a year and Tier 2 Partnerships shall be monitored once every 2.5 years as the guaranteed period for the partnerships is 5 years. However, if it is deemed that there are no specific issues regarding the partnership within such period, monitoring can be omitted by mutual agreement of the parties.

► **Key Questions for Partnership Monitoring**

The key questions that need to be asked when conducting partnership monitoring are as follows.

- Does the partnership perform activities as agreed in the partnership agreement and the project agreement?
- Does the partnership properly comply with the principles of partnerships?
- Is the partnership being performed pursuant to the plans? Are there any issues that need to be revised or corrected
- Do the ongoing activities or the project of the partnership violate the rights of children?
- Are capacity building activities properly performed? What are the effects of them?
- What could both parties do to make the partnership more effective and influential?
-

B. Capacity Building

Capacity building activities shall be conducted according to the following categories.

Organizational capacity	Details	Examples of Activities
Accounting Resources Management	<ul style="list-style-type: none"> • Accountability • Establishing and executing budgets according to the operation plans 	<ul style="list-style-type: none"> • Supporting participation in technical training programs for individuals/groups or providing such training programs directly • Providing support through connecting networks • Providing mentoring programs directly by itself or through other institutions • Mutually visiting one another • Exchanging employees between the parties (secondment)
Human Resources Management	<ul style="list-style-type: none"> • Managing human resources • Developing the capacity of employees and enhancing their participation 	
Strategic Leadership/ Operation	<ul style="list-style-type: none"> • Establishing strategies • Reinforcing governance • Sustainability of the institution • Resource mobilization capacity 	
Data Management System	<ul style="list-style-type: none"> • Monitoring and evaluation • Ability to prepare reports • Organizational learning 	
External/Public Relations	<ul style="list-style-type: none"> • External relations or networking • Advocacy 	
Understanding and application of the rights of children	<ul style="list-style-type: none"> • Educating the rights of children • Child Safeguarding capacity • Understanding the United Nations's Convention on the Rights of the Child (UNCRC) • Child Right Programming 	

C. Conflict Management

Conflicts may arise in partnership relations at any time. It is important to prevent potential conflicts, however it is even more important to acknowledge the tension between the parties and control such conflicts to prevent further conflicts in the process. If conflicts arise in partnership relations, the parties should be mindful of the following when communicating with each other.

- Taking consistent and professional attitudes - Delivering a consistent point of view by judging the situation and communicating with each other based on the basic principles of partnerships at all times. The parties could be reminded of the basic principles they agreed when forming the partnership through this process, and take this opportunity to reconsider the value of cooperation.
- Expecting any elements that might potentially cause conflicts in advance - Parties shall discuss any elements that might cause conflicts between them in the process of establishing the partnership plans, and agree on how to respond to any future conflicts beforehand.
- Acknowledging conflicts as an opportunity to have better cooperation - The parties shall acknowledge conflicts as an opportunity, and clearly understand the issue of the current conflicts and discuss with each other how to revise such issue.

3. Personnel and Roles

Roles	Personnel	R&R	Detailed Tasks (Draft)
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Roles	Personnel	R&R	Detailed Tasks (Draft)
Key Practitioner	Project Manager	Participating in monitoring	<ul style="list-style-type: none"> • Adjusting schedules for partnership review meetings in the country of the project • Participating in the partnership review meetings • Delivering the project related opinions • Receiving/giving feedback when revising partnership plans
	Partnership Manager (Project Team)	Conducting monitoring (Principal)	<ul style="list-style-type: none"> • Managing partnership monitoring schedules • Conducting partnership review meetings • Accompanying the relevant personnel on the visit to the workplace (if necessary) • Reporting the monitoring results • Revising partnership plans based on the monitoring results • Preparing draft plans
	Partnership Manager (Planning Team)	Reviewing the monitoring results	<ul style="list-style-type: none"> • Participating in partnership review meetings • Giving feedback after checking the monitoring results • Having official communications in case of any conflicts

Roles	Personnel	R&R	Detailed Tasks (Draft)
Decision Maker	Project Team Leader-Head of Department	Reviewing the monitoring results	<ul style="list-style-type: none"> • Reviewing the monitoring results • Decision making (if necessary)

Although it is possible to flexibly adjust the persons in charge and their roles depending on the manpower composition and business situation of each team, it is recommended that the person in charge of partnerships takes a lead in monitoring the partnership, and collects opinions from the project manager regarding the performance of the partner in the process in order to ensure the management and objectivity of the partnership by the organization itself.

Stage 5. Evaluation of Partnerships

1. Introduction

This is a stage where ChildFund evaluates the partnership at the end of the term of the partnership agreement, considers and decides whether to maintain or terminate the partnership based on the evaluation results.

2. Detailed Tasks

A. Evaluating partnerships	B. Deciding whether to maintain the partnerships
Evaluation (Steps 1-3)	Deciding whether to maintain/terminate the partnerships based on the evaluation results

Partnership evaluations shall be conducted pursuant to the following cycle by partnership level.

Partnership Type	Evaluation Cycle	Evaluation Methods
Tier 1	Every 3 years	<ul style="list-style-type: none"> • Partnership evaluation meetings • ChildFund's internal meetings (Listening to the project manager's opinions on the project) • Visit to the workplace (Optional)
Tier 2	Every 5 years	

► Evaluation on Tier 1 Partners

The evaluation shall be conducted in the third year since the formation of the partnership, and the parties can discuss and decide whether they would switch the partnership from Tier 1 to Tier 2 in this evaluation stage. However, not every partnership in Tier 1 is subject to the evaluation. For example, although ChildFund initially undertook the project after forming a Tier 1 partnership with the institution, if no further project is planned out as it is considered inappropriate to conduct a further project based on the project evaluation results, ChildFund shall be deemed to have no intention of maintaining the partnership with the current partner, therefore, such partnership shall not be subject to the partnership evaluation. In other

words, partnership evaluations shall be conducted on a partnership that has an ongoing project in the third year since the formation of a Tier 1 partnership with a possibility of being switched to a Tier 2 partnership, or a partnership that ChildFund intends to maintain as a Tier 1 partnership.

► **Evaluation on Tier 2 Partners**

For Tier 2 partners are partners that perform medium/long-term programs, they shall be guaranteed a minimum partnership period of 5 years to assure the stable performance of programs (See details of the execution of partnership agreements by partnership level in Page 17). Therefore, partnership evaluations shall be conducted in the fifth year since the execution of a Tier 2 partnership agreement.

► **Evaluation Stage**

Partnership evaluations are composed of Steps 1-3.

	Step 1	Step 2	Step 3
Evalu ator	ChildFund → Partner	Partner → ChildFund	Common
Conte nts	Conducting the evaluations by the period of Tier 1 and Tier 2 partnerships	Conducting the evaluations if ChildFund intends to maintain the partnership with the relevant partner based on the evaluation results at Step 1	<ul style="list-style-type: none"> - Conducting the evaluations if the relevant intends to maintain the partnership with ChildFund based on the evaluation results at Step 2 - A stage where the parties discuss what would be necessary to establish effective partnership relations based on the challenges and lessons from Steps 1 and 2.

Evaluation details	<ul style="list-style-type: none"> -Project performance - Reporting on the project <ul style="list-style-type: none"> - Communications - Cooperation other than those regarding the project <ul style="list-style-type: none"> - Capacity building - The basic principles of partnerships
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► **Key Questions for Partnership Evaluations**

The key questions that need to be asked when conducting partnership evaluations are as follows. [Tool 8. Partnership Evaluations]

- Have the project and activities performed through the partnership protected the rights of children?
- Has the partnership played an important role in improving the quality of children's lives?
- Has the partnership achieved the expected impact specified in the agreement? What are the main achievements of the partnership?
- Has the partnership complied with the principles of partnerships properly? Has the partnership effectively responded to obstacles and hindrances deviating from the principles of partnerships?
- What are the lessons learned from this partnership, and what are the lessons that can be applied in the future?
- Is it necessary to maintain the existing partnership? If so, what could both parties do to make the partnership more effective and influential?

► **Deciding whether to maintain or terminate partnerships**

ChildFund shall decide whether to maintain or terminate the partnerships based on the results of partnership monitoring and evaluations. Whether to switch the level of the partnerships is decided at this stage, and the final decision shall be made in accordance with the delegated authority. The parties shall perform specific duties in accordance with the level of the existing partnership based on the final decision on whether to maintain or terminate the partnership.

Evaluation results	<ul style="list-style-type: none"> • In case that there are achievements from the project, and there is no ground to disqualify the partnership from being maintained. • In case that ChildFund intends to expand the size of the project (budgets, scope of activities and regions, etc.) as the project has achieved satisfactory outcomes through the partnership. • In case that ChildFund intends to continue the partnership by switching the level of the existing partnership. 	<ul style="list-style-type: none"> • In case that the cooperation with the partner is no longer needed as the partnership has already achieved all the expected outcomes. • In case that the performance of the project through the partnership is cost-ineffective. • In case that it is necessary to terminate the partnership with the existing partner and to select a new partner to operate the project as the existing partnership has failed to achieve the expected outcomes. • If it is deemed impossible to maintain the partnership with the existing partner.
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Decision making	Maintaining the partnership (Adjusting the level of the partnership (if necessary))	Terminating the partnership
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Acti on plan s	Stage 1. Partner Assessment and Selection <ul style="list-style-type: none"> • Conducting further assessments on the partner institution → In case where the level of the partnership is switched from Tier 1 to Tier 2: Necessary → In case where the level of the partnership is switched from Tier 2 to Tier 1: Optional 	<p>Performing specific duties in accordance with the level of the existing partnership in each stage.</p>
	Stage 2. Establishment of Partnership Plans <ul style="list-style-type: none"> • Correcting and revising the partnership plans by reflecting lessons learned. • In case that the level of the partnership has changed, parties need to re-adjust the scope of the partnership and plans 	
	Stage 3. Conclusion of Agreements <ul style="list-style-type: none"> • Renewing the agreement after making revisions and corrections, 	
	Stage 4. Monitoring - Stage 5. Partnership Evaluations <ul style="list-style-type: none"> • Performing the same specific duties in each stage of the existing partnership. 	

► **Maintaining Partnerships**

If ChildFund intends to maintain Tier 1 or Tier 2 partnerships in the same scope of the existing partnerships, it shall maintain the partnerships by renewing the agreement after making partial corrections and revisions to the existing partnership plans.

► **Switching the Level of Partnerships**

If ChildFund has decided to maintain the partnership as switching the level of the partnership from Tier 1 to Tier 2 or vice versa, it also needs to send an official letter containing the evaluation results in its name to the other party so that it can provide clear evaluation grounds for switching the partnership level, and can briefly explain duties of the partnership in

each level following the switch and have necessary discussions with the other party. ChildFund needs to communicate with the other party as clearly acknowledging the fact that switching the level of the partnership does not mean the regression or progression of the partnership, but it means that the existing direction or form of the partnership is adjusted based on the results of the partnership monitoring/evaluation and the project performance evaluations, and thus the partnership plans are also adjusted accordingly, in order to prevent any unnecessary misunderstanding on the part of the other party.

► **Terminating Partnerships**

If ChildFund has decided to terminate Tier 1 or Tier 2 partnerships, it shall convey its intention to terminate the partnerships containing the evaluation results. ChildFund needs to communicate with the other party bearing in mind that it is always open to a possibility that it may cooperate with the same party in the future. Also, it shall perform necessary follow-up activities based on its exit strategy for the project.

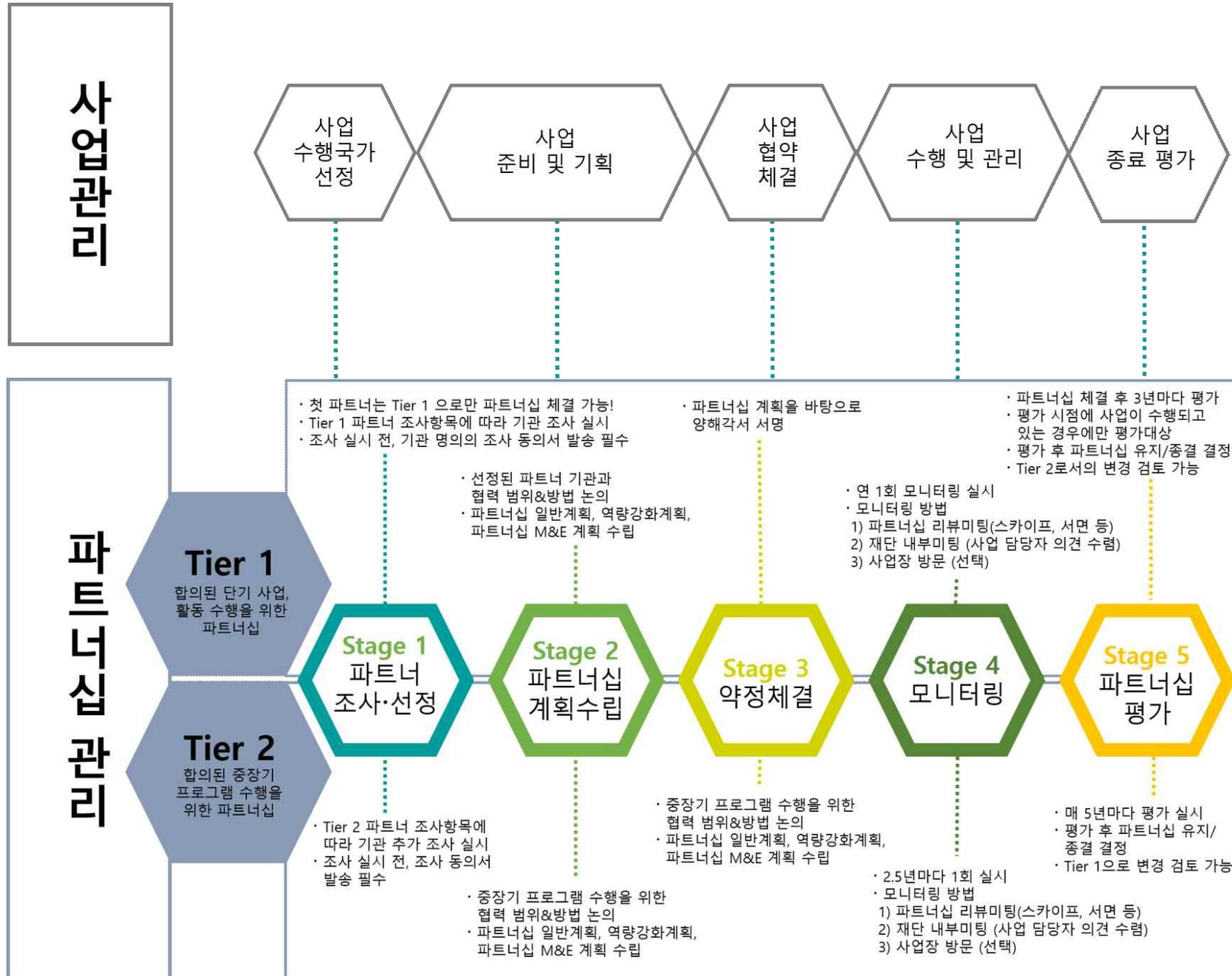
3. Personnel and Roles

Roles	Personnel	R&R	Detailed Tasks (Draft)
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Roles	Personnel	R&R	Detailed Tasks (Draft)
Key Practitioner	Project Manager	Participating in evaluations	<ul style="list-style-type: none"> • Participating in partnership evaluation meetings • Delivering the project related opinions • (If maintaining the partnerships) Performing duties of Stage 1 or Stage 2 • (If terminating the partnerships) Performing duties pursuant to the project exit strategy
	Partnership Manager (Project Team)	Conducting evaluations (Principal)	<ul style="list-style-type: none"> • Adjusting schedules for partnership evaluation meetings • Conducting partnership evaluation meetings (Principal) • Accompanying the relevant personnel on the visit to the workplace (if necessary) • Reporting the evaluation results • (If maintaining the partnerships) Performing duties of Stage 1 or Stage 2 • (If terminating the partnerships) Sending a letter containing the evaluation results • Reporting the evaluation results and preparing draft plans
	Partnership Manager (Planning Team)	Conducting evaluations (Deputy)	<ul style="list-style-type: none"> • Participating in partnership evaluation meetings • Accompanying the relevant personnel on the visit to the workplace (if necessary) • Giving feedback after checking the evaluation results • Having official communications in case of any conflicts

Roles	Personnel	R&R	Detailed Tasks (Draft)
Decision Maker	Project Team Leader - Head of Department - Head of Division	Deciding whether to continue or terminate partnerships	<ul style="list-style-type: none"> • Participating in partnership evaluation meetings • Accompanying the relevant personnel on the visit to the workplace (if necessary) • Giving feedback after checking the evaluation results • Making the final decision on whether to maintain the partnerships or not

Although it is possible to flexibly adjust the persons in charge and their roles depending on the manpower composition and business situation of each team, it is recommended that the person in charge of partnerships takes a lead in evaluating the partnership, and collects opinions from the project manager regarding the performance of the partner in the process in order to ensure the management and objectivity of the partnership by the organization itself.



사업 관리 Project Management

사업 수행국가 선정 Selection of countries for performing projects

사업 준비 및 기획 Preparation and planning of projects

사업 협약 체결 Conclusion of project agreements

사업 수행 및 관리 Operation and management of projects

사업 종료 평가 Evaluation of completed projects

파트너십 관리

Partnership management

Tier 1 합의된 단기 사업, 활동 수행을 위한 파트너십

Partnerships for performing agreed short-term projects and activities

Tier 2 합의된 중장기 프로그램 수행을 위한 파트너십

Partnerships for performing agreed medium/long-term programs

Stage 1 파트너 조사·선정

Partner assessment and selection

첫 파트너는 Tier1 으로부터만 파트너십 체결 가능!

New partners can only enter into Tier 1 partnerships only!

Tier 1 파트너 조사항목에 따라 기관 조사 실시

Conducting assessments on its partners with Tier 1 partner assessment items.

조사 실시 전, 기관 명의로 조사 동의서 발송 필수

An assessment consent form must be sent in the name of the ChildFund prior to conducting assessments.

Tier 2 파트너 조사항목에 따라 기관 추가 조사 실시

Conducting a further assessment based on Tier 2 partner assessment items.

조사 실시 전, 조사 동의서 발송 필수

An assessment consent form must be sent in the name of the ChildFund prior to conducting assessments.

Stage 2 파트너십 계획수립

Establishment of partnership plans

선정된 파트너 기관과 협력 범위&방법 논의

Discussing the scope and methods of cooperation with the selected partners

파트너십 일반계획, 역량강화계획, 파트너십 M&E 계획 수립

Establishing the general partnership plans, capacity building plans and partnership M&E plans

중장기 프로그램 수행을 위한 협력 범위&방법 논의

Discussing the scope and methods of cooperation in performing medium/long-term programs

파트너십 일반계획, 역량강화계획, 파트너십 M&E 계획 수립

Establishing the general partnership plans, capacity building plans and partnership M&E

plans

Stage 3 약정체결

Conclusion of Agreements

파트너십 계획을 바탕으로 양해각서 서명

Signing a MoU based on partnership plans

중장기 프로그램 수행을 위한 협력 범위&방법 논의

Discussing the scope and methods of cooperation in performing medium/long-term programs

파트너십 일반계획, 역량강화계획, 파트너십 M&E 계획 수립

Establishing the general partnership plans, capacity building plans and partnership M&E plans

Stage 4 모니터링

Monitoring

연 1회 모니터링 실시

Conducting monitoring once a year

모니터링 방법

Monitoring methods

1) 파트너십 리뷰미팅(스카이프, 서면 등)

Partnership review meetings (via Skype or in written form, etc.)

2) 재단 내부미팅 (사업 담당자 의견 수렴)

The ChildFund's internal meetings (gathering opinions from the project manager)

3) 사업장 방문 (선택)

Visit to the workplace (optional)

2.5년마다 1회 실시

Conducting monitoring once in every 2.5 years

모니터링 방법

Monitoring methods

1) 파트너십 리뷰미팅(스카이프, 서면 등)

Partnership review meetings (via Skype or in written form, etc.)

2) 재단 내부미팅 (사업 담당자 의견 수렴)

The ChildFund's internal meetings (gathering opinions from project manager)

3) 사업장 방문 (선택)

Visit to the workplace (optional)

Stage 5 파트너십 평가

Evaluation of Partnerships

파트너십 체결 후 3년마다 평가

Evaluating partnerships every 3 years after formation of partnerships

평가 시점에 사업이 수행되고 있는 경우에만 평가대상

Partnerships performing projects at the time of the evaluation shall only be subject to the evaluation.

평가 후 파트너십 유지/종결 결정

Deciding whether to maintain/terminate the partnership after the evaluation

Tier 2로서의 변경 검토 가능

Possible to review whether to switch it into Tier 2

매 5년마다 평가 실시

Evaluating partnerships every 5 years

평가 후 파트너십 유지/종결 결정

Deciding whether to maintain/terminate the partnership after the evaluation

Tier 1으로 변경 검토 가능

Possible to review whether to switch it into Tier 1

04. Forms and Tools regarding Partnerships

[Table 2. List of tools and forms relevant for each partnership stage]

Partnership Stages	Tools and Forms
Stage 1. Partner Assessment and Selection	Tool 1. Stakeholders` list
	Tool 2. Letter of intent
	Tool 3. Partner assessment
	Tool 4. Analysis report on research into candidates for new partnerships (Attachment 1. SWOT Analysis Template)
	Tool 5. Letter of appreciation
Stage 2. Establishment of Partnership Plans and Agreement	Tool 6. Common Work Plan
Stage 3. Conclusion of Agreements	Tool 7. Memorandum of Understanding (MoU)
Stage 5. Evaluation of Partnerships	Tool 8. Evaluation of Partnerships

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These Guidelines have been completed with effort and cooperation of many colleagues aiming to support the management of ChildFund Korea's overseas projects partnerships. Please send us various opinions inspired by working in the field so that these Guidelines can become a better tool.

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