

ANNEX 1: ASSESSMENT OF ORGANISATIONAL COMPATIBILITY (CHECKLIST 1)

DÓCHAS PARTNERSHIP CHECKLIST 1: COMPATIBILITY OF THE POTENTIAL PARTNER ORGANISATIONS¹³

Principle	No.	Statement	Yes / No	Issues / Potential Solutions
Shared Vision (P1)	1.	The potential partners (i.e. the Dóchas member and the local CSO) broadly share a similar vision of development, based on people being empowered to take control of their own lives, and all citizens having equal rights to resources, services and power		
	2.	The visions of both organisations are compatible in terms of prioritising the needs and / or rights of the poorest , most vulnerable and most marginalised groups in society.		
	3.	The particular perspectives or approaches towards development (e.g. the use of rights-based, needs-based, social justice or solidarity perspectives / approaches) of the two organisations are sufficiently compatible to allow them to work together without major conflict.		
	4.	The existing vision statements and / or respective 'theories of change' and / or general 'logic of intervention' of the two organisations (where they exist) are broadly compatible.		
Shared Values (P2)	5.	The two organisations operate from broadly similar sets of organisational values (regardless of whether these values are officially documented or not).		
	6.	The particular belief systems, faith-based approaches or guiding philosophies from which either of the two organisations operates have been explored: no potential areas of conflict or tension have been identified as a result of this discussion. OR Some potential tensions or conflicts have been identified during the discussion, but adequate measures can be put in place to ensure that these differences can be reconciled or managed.		
	7.	The two organisations take a broadly similar approach towards the empowerment of individuals, communities and citizens, and the active participation of target beneficiaries in all phases of projects.		

¹³ This checklist is primary concerned with the thinking, values, and commitments that drive the two organisations, and the potential for collaboration between them. The actual capacity of the local CSO partner to deliver on its commitments is assessed later under Checklist 1B.

DÓCHAS PARTNERSHIP CHECKLIST 1: COMPATIBILITY OF THE POTENTIAL PARTNER ORGANISATIONS¹⁴

Principle	No.	Statement	Yes / No	Issues / Potential Solutions
Shared Values (P2)	8.	Both organisations take a non-discriminatory approach to targeting of beneficiaries.		
	9.	The two organisations give a similar commitment and priority to promoting gender equality as a key development issue, both within their programme work, and within their respective organisations.		
	10.	Both organisations are highly committed to the protection of all programme participants (including staff), and to safeguarding children in particular.		
Coherent Strategy (P3)	11.	The overall strategies of the two organisations (through which they articulate how they aim achieve their organisational missions and objectives) are broadly compatible with each other, even if there are significant differences in terms of the overall scope, content or priorities of the respective strategic plans i.e. there are no obvious conflicts between the strategic plans of the two organisations.		
	12.	The two organisations are able to agree on a broad coherent joint strategy for collaboration (potentially but not necessarily including programming, advocacy, and or capacity-building work components) in order to achieve their mutual aims.		
	13.	The joint strategy will not encourage or force the local CSO partner to deviate in any way from its currently articulated strategy or projects, unless it already has the clear intention and the capacity to do so.		
Mutual Trust and Accountability (P4)	14.	Exploratory discussions between the two potential partners are conducted in an open, honest and constructive manner , with both organisations being frank about their own needs, strengths and weaknesses. Both partners have indicated any limiting factors from their perspective in a potential relationship.		

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Principle	No.	Statement	Yes / No	Issues / Potential Solutions
Mutual Trust and Accountability (P4)	15.	The local CSO is committed to using all funds provided by the Dóchas member in an appropriate and transparent manner , in line with the agreed activities and / or projects agreed between the parties. The local CSO and the Dóchas member are able to agree on a basic standard and frequency of reporting , and a reasonable schedule for field monitoring visits, as required to meet both the internal needs of the Dóchas member, and the requirements of any external donors.		
	16.	The Dóchas member is committed to providing full downward accountability to the local CSO in relation to how its own projects and activities are funded and implemented, and on any external conditions relating to the funding. It is also committed to providing funding on a timely basis, as soon as the basic reporting requirements have been met. It is equally committed to making reporting requirements as simple as possible (as appropriate to the nature and scale of the projects, and any back-donor requirements), and to provide capacity support on proposal writing, financial management and report writing, where necessary.		
	17.	Both organisations are committed to providing full downward accountability to project beneficiaries , including regular reports to them, and specific opportunities for beneficiary consultation, feedback and critique of the work of both the local CSO and that of the Dóchas member.		
Realistic Expectations (P5)	18.	The scale and content of the potential partnership agreement being discussed, including the level of potential funding, is realistically proportionate to the current capacity of the local CSO, its ability to deliver project of that scale and nature, and the capacity of the Dóchas member to provide the required level of support.		

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Principle	No.	Statement	Yes / No	Issues / Potential Solutions
Realistic Expectations (P5)	19.	The establishment of this partnership and the work generated by it will not create any unnecessary workloads or duplication of activities for the local CSO, particularly in the context of existing partnerships or relationships it has (or is planning to have) with other agencies.		
Long-term Commitment (P6)	20.	Both partners are actively interested in the possibility of engaging in a longer-term partnership , where it is appropriate to do so, subject to the initial engagement being of a fruitful nature for both organisations.		
Clear Roles and Responsibilities (P7)	21.	The two parties are able to reach broad agreement on a potential set of initiatives and actions that might form the basis of an initial partnership, including ways in which the Dóchas member could support the local CSO (Section 6.1), ways in which the local CSO could support the Dóchas member (Section 6.2), and other ways in which they could collaborate on an equal basis (Section 6.3).		
	22.	The Dóchas member is committed to ensuring that any action on its part (e.g. in opening a field office, seeking funding from external donors at field level, or engaging in field level advocacy) will not compete with or undermine the activities or opportunities of the local CSO in any way.		
Flexibility and Adaptability (P8)	23.	Both parties are committed to a learning approach, within which the design of future interventions is adapted to accommodate the lessons from previous actions, or significant changes in the context surrounding the partnership (including changes within either organisation). Some potential scenarios that might require change (e.g. the occurrence of natural disaster or conflict situation) have been discussed, and potential changes have been considered.		
Respecting Difference (P9)	24.	The Dóchas member and the local CSO view each other as equals from a relationship point of view, regardless of potentially significant differences in their respective levels of resources, capacity and influence. The Dóchas member will not enter into a relationship where a local CSO is treated solely as a contracting agent.		

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Principle	No.	Statement	Yes / No	Issues / Potential Solutions
Delivering Positive Change (P10)	25.	Both parties are looking beyond the mechanics of any potential partnership agreement, to ensure that their collaboration will ultimately lead to the delivery of real and lasting changes in the lives of the target beneficiaries within a realistic timeframe. Both parties are committed to setting clear targets for achievement of results within all projects, and within the partnership as a whole, and to the establishment of systems and processes to deliver and measure those results.		

SUMMARY TABLE 1: COHERENCE ASSESSMENT

Conclusion on overall level of coherence between potential partners:	
Main issues for Dóchas member to address:	
Main issues for Potential Partner to address:	
Conclusion on whether to proceed (Yes / No / Why/ not)	
Key actions required before signing a partnership agreement:	

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