WEF Partnerships
Partnerships can be useful tools in the development of a service matrix for an organization's membership, as long as there is specific criteria that must be met in order for even the best of intentions to be worth the effort.:

WEF Partnership Criteria

1. The clear articulation of complimentary strategic interests
2. Identification of benefits to be derived by each signatory
3. Identification of specific projects or activities unique to the interests of the partners
4. Measurable standards of performance for each project/activity
5. A defined and specific time frame not longer than the delivery date of the named projects or activities.
6. A clear review and ratification process for extending the agreement
7. A specific business plan for each activity or project within the agreement
8. A protocol for periodic review of both the included activities/projects and for the agreement itself.

Letters of intent will be used where the criteria for partnerships are not applicable but where the establishment of lines of communication are desirable.

Adopted by the WEF Board of Trustees March 2003

Proposed Resolution
Water Environment Federation
Partnership Principles

Whereas: The P3D working group was asked by the WEF President to explore issues related to how WEF makes decisions about engaging in collaborative projects or partnerships with other organizations.

Whereas: The working group has identified and used as guiding principles the Partnership Criteria adopted by the WEF Board in March 2003.

Whereas: These principles are designed to be used as a tool for staff and trustees to evaluate the appropriateness of a specific partnering opportunity.

Whereas: It is not intended that these principles be used as an absolute test to make the decision, but rather it is intended to be used to facilitate evaluation and discussion of the merits of each potential opportunity.

Be it Resolved: That the Board of Trustees approves these "Partnership Principles" to evaluate strategic and collaborative partnerships and projects.

Be it Further Resolved: That the Board of Trustees approves these "Partnership Principles" to be used as guidelines that facilitate a structured discussion on decisions about partnering opportunities.

March 2008

WEF Partnering Principles

STRATEGIC PARTNERSHIPS
How do we decide if we should have a strategic partnership?

Issues that should be considered in order to develop an agreement that meets the board-approved partnership criteria are listed below. The relevant partnership criterion number, if appropriate, is included in parentheses.

Screening criteria

1. Are the objectives of the proposed partner aligned with those of WEF? (**WEF Policy on Partnership Criteria Item Number 1**)
2. How will the partnership benefit WEF and its members (**WEF Policy on Partnership Criteria Item Number 2**)
    a. Will the "partnership" substantially advance WEF's mission?
    b. Is it consistent with our strategic plan and initiatives?
    c. What are the specific tangible or the intangible benefits of this strategic partnership?
    d. Are the benefits to be derived from the partnership equitable? (Specifically, are the likely benefits that will accrue to WEF in balance with our investment, our role, and our risks, especially as they compare to those associated with our partner?)
    e. Is the partnership for commercial benefit (increased revenue to both organizations?) or simply an attempt to use WEF branding?
    f. Does it advance our global mission?
    g. Does the partner bring strengths to the relationship that contributes either to the business success or mission objectives?
3. What are the potential downsides to this proposal
    a. What are the risks to our business models?
    b. Is there a risk to WEF market share or brand?
    c. Have we considered the potential liability risks from the content, conduct or outcome of the partnership and have these been acceptably minimized?
4. Is this partnership inconsistent with other more vital strategic relationships or interests?
5. What resources (staff, volunteer, financial) are likely to be required to implement this partnership and are these justified based on the likely benefits?

Criteria used to evaluate specifics of proposed partnership to assess compliance with Board-approved criteria

1. Are the objectives of the partnership clearly defined and beneficial to WEF (**WEF Policy on Partnership Criteria Item Number 2**)?

2. Are there sufficient anticipated activities to warrant a strategic collaboration? (**WEF Policy on Partnership Criteria Item Number 3**)
3. Are specific and substantive projects, programs and activities defined along with metrics for success (**WEF Policy on Partnership Criteria Item Number 1, 3, 4, 5, 6 and 7**)?
4. Is the process and timetable for evaluation of partnership success clearly defined (**WEF Policy on Partnership Criteria Item Number 8**)?
5. Is there an exit strategy **(WEF Policy on Partnership Criteria Item Number 8**)?

PARTNERING DECISIONS ON INDIVIDUAL PROJECTS

How do we decide on an individual activity for partnering?

While is assumed that there will be extensive board involvement in the approval of strategic partnerships, management of individual activities will likely be based on the nature of the specific activity.

WEF has an established track record of collaborating successfully with other not-for-profit organizations for example on development of books, conferences, and grant applications. Where the new activity fits into an established and previously successful model with a long-standing partner, approval and negotiations will likely be handled at the staff level. In cases of a new partner, or kind of activity or where WEF funding is being requested, Board involvement is likely. In either case, the criteria used to evaluate the opportunity should be consistent.

Criteria

1. Is this proposed project of merit and is there a cost effective plan – is the project likely to succeed?
2. Does the project utilize/leverage the respective strengths of the two organizations?
3. If applicable, how does this proposal contribute to the strengthening of our strategic relationship and does it conform to related agreements?
4. What is the value to WEF and its members of engaging in this activity?
   (a) Is the proposed activity consistent with WEF's strategic plan and does it support an organizational (strategic) priority identified by the Board?
   (b) What are the specific tangible (new product, revenue, market access etc) or the intangible (image, for example) benefits to WEF?
   (c) Is this an equitable partnership? Is each partner contributing and benefiting in proportion to its relative contribution and risk?
   (d) Is this something that WEF could accomplish working alone, and if, so what is the reason for partnering?
5. What are the potential downsides to this proposal?
   (a) Is there any risk to WEF market share?
   (b) Is there a risk to WEF image or brand in working with this partner?
   (c) Are there risks associated with conduct, content, or outcome, and if there is risk, has WEF's potential liability been minimized?"

6. What resources (staff, volunteer, financial) will be required to implement this partnership and are these justified based on the likely benefits and on other organizational priorities?

MANAGING PARTNERSHIPS

How should WEF manage collaborative projects and relationships?

1. Who is the point of contact and management: staff, volunteer, Trustee or officer?
2. How is that person selected?
3. Should there be a kind of WEF advisory group or individuals?
4. What kind of tracking and reporting is required, if at all, and to whom and at what frequency?
5. What are benchmarks, milestones?
6. Do we have performance criteria? Expectations?
7. Have we defined level of resources committed by both organizations?
8. Have we defined a contingency plan if complications arise or either organization fails to perform?
9. Should staff have the primary responsibility for managing the business side of collaborative projects including budget, schedule and achievement of business goals?
10. Should there be a WEF volunteer leader for every project (or just some) to work with staff and to focus on issues of technical scope, quality, coordination with WEF committees, etc.
11. There should be "post mortem" at the conclusion of collaborative projects to allow for continuous improvement.

Approved
WEF Board of Trustees
March 2008