BUILDING PARTNERSHIPS FOR LANDSCAPE-SCALE CONSERVATION:
Guidance for Identifying and Developing Collaborative Partnerships

Jonathan Canioni, Natasha Constant, Mehmet Chakkol, Mark Johnson, Joelene Hughes
Building Partnerships for Landscape-Scale Conservation

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Collaboration is key to the success of landscape-scale conservation and restoration initiatives. Multi-partner projects of any sort rely on relationships between those partners, and landscape conservation and restoration are no exception. Without good relationships, the delivery of the project will suffer. Additionally, conservation usually relies on the actions of stakeholders to deliver, or at least approve of, land or marine management. Project leaders rarely have complete control over all stakeholders’ activities, so effective collaboration is vital.

To support collaboration, the Building Partnerships for Landscape-Scale Conservation project has designed two linked Tools and associated Guidance, to support collaboration in large-scale restoration and conservation projects. The Guidance documents and associated Tools aim to assist project managers and their teams to understand effective interorganisational relationships, and to support the development and operation of collaborative partnerships in their specific context, with the ultimate goal of increasing the impact of landscape conservation and restoration initiatives on the ground.

The guidance and tool have been split into two parts. This Guidance for Identifying and Developing Collaborative Partnerships relates to the Collaborative Partnership Tool, and covers the identification, establishment and conclusion of a partnership. The linked Guidance for Assessing an Individual’s Collaborative Behaviours and Competencies works with the Individual Behavioural Assessment Tool to support assessment and development of the specific behaviours and competencies required by teams and individuals for a successful partnership.

The Guidance and Tools have been developed from interviews with staff working on large-scale conservation and restoration projects funded by the Endangered Landscapes Programme. These interviews aimed to elicit the behaviours of collaborative working in the context of landscape conservation. The results have been combined with data on collaborative behaviours previously collected in commercial enterprises and public procurement settings.

Behaviours occur in the context of practices and are affected by changes and evolutions in the collaborative setting. The project environment, in terms of partners, their (sub)cultures, processes, practices and types of deliverables, is either conducive or obstructive for the development of effective collaborative behaviours. This research found that in landscape-scale conservation the setting varied across different levels:

- **Organisational level**: Each collaboration between an organisation and its partners is unique and has its own idiosyncrasies in terms of its setting.
- **Partnership level**: Within a given partnership, each project or sub-project operates within a different setting.
- **Project Level**: Within the same project, collaborative behaviours will vary in terms of breadth and embeddedness across project locations, teams and individuals.

In addition, the data showed that collaboration in conservation and restoration projects was highly dependent on prior relationships between people. While this can promote high levels of initial trust between partners, it also poses a significant risk to the project and the collaboration in the event of internal and external transitions.

Rather than isolating individual behaviours from the collaborative setting, the Guidance and Tools are ideally used together to adopt a holistic approach to collaboration. The Tools match the complexity of landscape-scale conservation projects and inter-organisational relationships by examining the technical and relational aspects of projects, collaborative cultures, and individual behaviours.
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</tr>
</tbody>
</table>
The Collaborative Partnership Tool provides three frameworks to support your collaboration needs. These are structured through a three-step process which identifies and develops effective partnerships (Table 1). There is also an additional, fourth step focused on managing transitions and ending partnerships. This document will guide you through these four steps. If you wish to carry out a more detailed assessment of individual and team behaviours (Step 3), please refer to the associated Guidance for Assessing an Individual’s Collaborative Behaviours and Competencies. This will guide you through a consideration of the behaviours needed by teams and individuals to develop and maintain effective working partnerships.

While this Tool and Guidance provide a process, informed by research into what makes an effective partnership, we encourage users to customise the Tool around their specific needs to ensure it matches their relationships and projects. To do this, we strongly recommend involving all team leaders and project managers who will be responsible for the project in each stage of the process and not underestimating the time each step may take!

<table>
<thead>
<tr>
<th>Framework</th>
<th>Purpose</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>The 4C Matrix</td>
<td>This aims to identify who to collaborate with on a project, by segmenting project partners according to a set of relational and technical requirements of the joint work to be conducted.</td>
<td>Step 1: Identifying and segmenting partners</td>
</tr>
<tr>
<td>Cultural Framework</td>
<td>This aims to create an overarching cultural action plan for partners, to support the implementation and development of a collaborative project culture from the project’s onset.</td>
<td>Step 2: Designing collaborative cultures</td>
</tr>
<tr>
<td>Behavioural Framework</td>
<td>This aims to identify the behaviours needed to support the collaborative setting and the project’s delivery.</td>
<td>Step 3: Identifying behaviours</td>
</tr>
</tbody>
</table>

Table 1. The three frameworks and steps involved in identifying and developing effective partnerships for conservation projects.
Step 1: Identifying and Segmenting Partners

The first step in the development of a new conservation project is to determine whether a project’s core aims and objectives could be better met by a partnership or by one organisation working independently (Box 1).

Box 1: What is a partnership?

A partner is an organisation or group with whom a team collaborates to achieve the shared goals of positive outcomes for biodiversity and people. Collaborative partnerships can have several advantages:

- Increasing the quality, scale and impact of conservation projects.
- Increasing the range of technical expertise, knowledge, data and information across scales to tackle conservation problems.
- Reducing financial costs for organisations or leveraging and securing public or private funding to support large-scale conservation projects.
- Building capacity among partners.

Partnerships are usually defined by several components:

- A rationale for working together to plan, implement or measure the success of conservation actions on the ground.
- A specific geographical scale of operation e.g., local, regional, national or global.
- The specific sector from which each partner originates, such as government agencies, multilateral institutions, private and business enterprises, academic institutions, non-governmental organisations or communities.
- The type of relationship, which can be described as transactional, coordinative, cooperative or collaborative, defined as follows:
  - **Transactional:** The project is transactional by nature. It involves few or no relationships and largely depends on internal capabilities and resources.
  - **Coordinative:** The project is transactional by nature but requires the alignment and coordination of resources and capabilities of partners, due to a high degree of interdependence across tasks.
  - **Cooperative:** The project’s success relies on strong relationships with the external partner, who has a high degree of decisional power over the project and its deliverables. Technical requirements can be largely fulfilled by internal capabilities.
  - **Collaborative:** The project is defined by a high degree of technical and relational inter-dependencies. It cannot be delivered without embedded collaboration.
If a partnership is deemed desirable, a partnership scoping process, which may include gap analysis and stakeholder mapping, can be used to identify and refine the list of potential partners for a project (Box 2).

**Box 2: Partnership Scoping Process**

A partner scoping process is a key element of project success. It is important to consider whether partnerships will enable you to meet your project goals and strategy, including the kind of partnership you need to develop, and the strengths and weaknesses of working with different partners. Reflecting on the type of partners to engage at the planning stage of a project can ensure effective partnership building and help to anticipate possible conflicts. A scoping process is essential to (1) identify partnerships of value, (2) build upon existing and proven networks, as well as identifying new partnerships, and (3) select the most appropriate partners before the inception of a project. A scoping process should include the following components:

**a. Clarify project vision, goals, and objectives:** Reflect on the vision, goals and objectives of the project by describing what the project seeks to achieve. This allows you to identify the types of expertise and partnerships required to achieve success.

**b. Identify key partner traits:** Brainstorm the competencies and expertise needed to achieve the project goals and objectives. Reflect upon your own team's capacity to carry out these objectives and activities, as well as your organisation's capacity to manage these issues. Identifying obvious gaps in expertise and capacity can highlight roles that could potentially be filled by partners. This gap analysis can identify a core list of partner criteria.

**c. Identify potential partners:** Create a list of prospective partners and determine the roles they will play in the project. Partners could be identified through existing networks, primary and secondary resources, as well as by interviewing prospective partners directly. Stakeholder mapping exercises can be used to develop a list of stakeholders that can influence your projects. Once you have a list of partners, consider building up a database containing profiles for each potential partner, including characteristics such as positions, roles and interests, and levels of engagement.

**d. Refine and decide on your partner list:** Narrow the list of prospective partners in consultation with your team by beginning to eliminate those partners that do not meet the needs of your project.

After partners are identified, they can be segmented to identify whether relationships are collaborative, coordinative, cooperative or transactional. This requires consideration of both the relational and technical requirements of a project, which can be defined as follows:

- **Relational:** To what degree can a potential partner affect the project outcome?
- **Technical:** What are the capabilities, competencies and resources needed?

The first step of the Tool can be used to guide the segmentation process for a potential partnership, by assessing each partner according to the set of relational and technical aspects that characterise the project as described below.
1.1 The relational score

Each partner is assessed across a set of factors that cover the relational requirements of the project using sheet 1.1 Relational Score* of the Collaborative Partnership Tool. Each partner is scored from 1 to 10 for every factor, with 1 indicating that your organisation has the internal resources and capabilities and 10 indicating that the factor is completely dependent on the partner. The relational score spreadsheet has three areas:

1) The Factor Area: The first and last filled columns (shaded orange in the figure below) show the set of statements that define the crucial factors. These statements enable the assessment of partners along the spectrum delimited by the statements.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Partner 1</th>
<th>Partner 2</th>
<th>Partner 3</th>
<th>Partner 4</th>
<th>Partner 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your organisation makes the decisions for planning project outcomes</td>
<td>8</td>
<td>3</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The project is a priority to all stakeholders, and/or does not rely on</td>
<td>7</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a single entity for facilitating its delivery</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The success of the project is steered by the vision of your organisation, which can influence stakeholders for overcoming emerging issues</td>
<td>7</td>
<td>5</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your organisation can deliver outputs without access authorisation or consents and handles the temporality of the project</td>
<td>8</td>
<td>3</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your organisation relies on internal or readily available knowledge and/or information for planning and delivering the works</td>
<td>9</td>
<td>4</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partners and stakeholders require little to no information from your organisation for the planning and/or delivery of the works</td>
<td>8</td>
<td>4</td>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Relational Score
Total Relational Score (%)

2) The Partner Assessment Area: Use the central columns of the spreadsheet (shaded orange in the figure below) to score the relational requirements of each strategic partner in delivering the project. Include a column for each partner involved in the project and score each from 1 to 10 for every factor, where 1 reflects a full agreement with the leftmost column, and 10 with the rightmost column.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Partner 1</th>
<th>Partner 2</th>
<th>Partner 3</th>
<th>Partner 4</th>
<th>Partner 5</th>
</tr>
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<tbody>
<tr>
<td>Your organisation makes the decisions for planning project outcomes</td>
<td>8</td>
<td>3</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The project is a priority to all stakeholders, and/or does not rely on</td>
<td>7</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a single entity for facilitating its delivery</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The success of the project is steered by the vision of your organisation, which can influence stakeholders for overcoming emerging issues</td>
<td>7</td>
<td>5</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your organisation can deliver outputs without access authorisation or consents and handles the temporality of the project</td>
<td>8</td>
<td>3</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your organisation relies on internal or readily available knowledge and/or information for planning and delivering the works</td>
<td>9</td>
<td>4</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partners and stakeholders require little to no information from your organisation for the planning and/or delivery of the works</td>
<td>8</td>
<td>4</td>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Relational Score
Total Relational Score (%)

* Text in gold refers to specific sections of the Collaborative Partnership Tool spreadsheet.
3) The Results Area: This area at the bottom of the spreadsheet (shaded orange in the figure below) calculates the total relational score for each partner across all factors. This score evaluates the necessary embeddedness of the relationship between your organisation and each individual partner organisation needed to support the project outcome.

<table>
<thead>
<tr>
<th>Relational Score</th>
<th>Partner 1</th>
<th>Partner 2</th>
<th>Partner 3</th>
<th>Partner 4</th>
<th>Partner 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your organisation makes the decisions for planning project outcomes</td>
<td>8</td>
<td>3</td>
<td>6</td>
<td>The partner/stakeholder has high decisional power over the planning of project outcomes</td>
<td></td>
</tr>
<tr>
<td>The project is a priority to all stakeholders, and/or does not rely on a single entity for facilitating its delivery</td>
<td>7</td>
<td>2</td>
<td>3</td>
<td>The project depends on the commitment of the partner/stakeholder to facilitate the delivery of environmental projects</td>
<td></td>
</tr>
<tr>
<td>The success of the project is steered by the vision of your organisation, which can influence stakeholders for overcoming emerging issues</td>
<td>7</td>
<td>5</td>
<td>7</td>
<td>The success of the project requires a high degree of mutual understanding and alignment of behaviours between the partner/stakeholder and your organisation to overcome emergent issues</td>
<td></td>
</tr>
<tr>
<td>Your organisation can deliver outputs without access authorisation or consents and handles the temporality of the project</td>
<td>8</td>
<td>3</td>
<td>5</td>
<td>The stakeholder/partner is instrumental in providing access for delivering outputs, and have a high degree of influence over deadlines</td>
<td></td>
</tr>
<tr>
<td>Your organisation relies on internal or readily available knowledge and/or information for planning and delivering the works</td>
<td>9</td>
<td></td>
<td></td>
<td>The knowledge and/or information held by or collected by the stakeholder/partner is instrumental for the planning and/or delivery of the works</td>
<td></td>
</tr>
<tr>
<td>Partners and stakeholders require little to no information from your organisation for the planning and/or delivery of the works</td>
<td>8</td>
<td></td>
<td></td>
<td>The partner and stakeholder requires extensive information from the organisation for the planning and/or delivery of the works</td>
<td></td>
</tr>
<tr>
<td>Total Relational Score</td>
<td>7.83</td>
<td>3.50</td>
<td>4.67</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>Total Relational Score (%)</td>
<td>78.33</td>
<td>35.00</td>
<td>46.67</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
</tr>
</tbody>
</table>

Image: Madalin Mocanu
1.2 The technical score

The technical score for each partner is calculated on sheet 1.2 Technical Score of the Collaborative Partnership Tool. As with the relational score, each partner is assessed across a set of factors with a score between 1 and 10. This spreadsheet also has three areas:

a) The Factor Area: The first and last filled columns (shaded in orange in the figure below) show the set of statements that define the factors that describe the technical and financial requirements and risks of the project. These statements enable the assessment of partners along the spectrum delimited by the statements.

<table>
<thead>
<tr>
<th>Technical Score</th>
<th>Partner 1</th>
<th>Partner 2</th>
<th>Partner 3</th>
<th>Partner 4</th>
<th>Partner 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>The project can be delivered successfully through internal or readily available resources</td>
<td>The partner’s resources are instrumental for the successful delivery of the project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The project can be delivered successfully through internal or readily available capabilities and skills</td>
<td>The partner’s capabilities and/or skills are instrumental for the successful delivery of the project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The project can be delivered successfully through internal or readily available knowledge or information</td>
<td>The information and/or knowledge held by or collected by the partner is instrumental for the successful delivery of the project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Technical Score</strong></td>
<td><strong>7.67</strong></td>
<td><strong>7.00</strong></td>
<td><strong>7.67</strong></td>
<td><strong>#DIV/0!</strong></td>
<td><strong>#DIV/0!</strong></td>
</tr>
<tr>
<td><strong>Total Technical Score (%)</strong></td>
<td><strong>76.67</strong></td>
<td><strong>70.00</strong></td>
<td><strong>76.67</strong></td>
<td><strong>#DIV/0!</strong></td>
<td><strong>#DIV/0!</strong></td>
</tr>
</tbody>
</table>

b) The Partner Assessment Area: Use the central columns of the spreadsheet (shaded in orange in the figure below) to enter scores assessing the technical requirements for each strategic partner in delivering the project. Include a column for each partner involved in the project and score each from 1 to 10 for every factor, where 1 reflects a full agreement with the leftmost column, and 10 with the rightmost column.

<table>
<thead>
<tr>
<th>Technical Score</th>
<th>Partner 1</th>
<th>Partner 2</th>
<th>Partner 3</th>
<th>Partner 4</th>
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<tbody>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Technical Score</strong></td>
<td><strong>7.67</strong></td>
<td><strong>7.00</strong></td>
<td><strong>7.67</strong></td>
<td><strong>#DIV/0!</strong></td>
<td><strong>#DIV/0!</strong></td>
</tr>
<tr>
<td><strong>Total Technical Score (%)</strong></td>
<td><strong>76.67</strong></td>
<td><strong>70.00</strong></td>
<td><strong>76.67</strong></td>
<td><strong>#DIV/0!</strong></td>
<td><strong>#DIV/0!</strong></td>
</tr>
</tbody>
</table>

c) The Results Area: This area, at the bottom of the spreadsheet (shaded in orange in the figure below) provides the total technical score for each partner across all factors. This score evaluates the level of integration of systems, processes and competencies needed between your organisation and each individual partner organisation to support delivery of the project.

<table>
<thead>
<tr>
<th>Technical Score</th>
<th>Partner 1</th>
<th>Partner 2</th>
<th>Partner 3</th>
<th>Partner 4</th>
<th>Partner 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>The project can be delivered successfully through internal or readily available resources</td>
<td>The partner’s resources are instrumental for the successful delivery of the project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The project can be delivered successfully through internal or readily available capabilities and skills</td>
<td>The partner’s capabilities and/or skills are instrumental for the successful delivery of the project</td>
<td></td>
<td></td>
<td></td>
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<td><strong>7.00</strong></td>
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<td><strong>#DIV/0!</strong></td>
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</tr>
<tr>
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<td><strong>76.67</strong></td>
<td><strong>70.00</strong></td>
<td><strong>76.67</strong></td>
<td><strong>#DIV/0!</strong></td>
<td><strong>#DIV/0!</strong></td>
</tr>
</tbody>
</table>
1.3 The 4C Matrix

Once you have completed sheets 1.1 and 1.2 of the Tool, the sheet **4C Matrix** will automatically complete. This spreadsheet provides a table in which each partner is ranked “HIGH”, “MEDIUM” or “LOW” for Relational and Technical requirements, allowing you to see how different partners may affect project outcome (Relational score) or provide the capabilities, competencies and resources needed (Technical score).

<table>
<thead>
<tr>
<th>Partner</th>
<th>Relational score</th>
<th>Technical Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner 1</td>
<td>78.33 HIGH</td>
<td>76.67 HIGH</td>
</tr>
<tr>
<td>Partner 2</td>
<td>35.00 LOW</td>
<td>70.00 HIGH</td>
</tr>
<tr>
<td>Partner 3</td>
<td>46.67 MEDIUM</td>
<td>76.67 HIGH</td>
</tr>
<tr>
<td>Partner 4</td>
<td>#DIV/0! LOW</td>
<td>#DIV/0! LOW</td>
</tr>
<tr>
<td>Partner 5</td>
<td>#DIV/0! LOW</td>
<td>#DIV/0! LOW</td>
</tr>
</tbody>
</table>

Based on their relational and technical scores, the second area of the sheet **4C Matrix** places partners into the segmentation matrix. This identifies the type of relationship that should ideally be developed with each partner to deliver the project. Each partner is positioned in one of the four types of inter-organisational relationships defined for this tool: Transactional, Cooperative, Coordinative or Collaborative (Box 1).
The position of the partner will define the type of contractual arrangements, cultures, processes, practices and behaviours that should be deployed in the relationship.

Based on previous studies and research for this Tool, we propose the following guidelines:

- **Transactional:** when relational and technical requirements of the project for a partner are low. A transactional relationship does not require specific relational practices or high degrees of alignment or integration. This may often be a contractual relationship, paying someone external to complete specific, activity-based deliverables. In a transactional relationship, power roles are clear, authorities and resources are kept entirely separate, and there is little or no long-term investment made in the partnership.

- **Coordinative:** often contractual, this requires the alignment and coordination of resources and capabilities of multiple partners. In projects with coordinative relationships, longer-term investment in partnerships may be needed to coordinate some planning and vision of roles, shared resources, rewards and risks. Coordinative relationships require specific contractual arrangements to safeguard against technical risks and challenges. These may include, but are not restricted to, deployment of contractually defined processes, procedures, systems, agreed-upon resources and capabilities. Contracts can also support alignment and integration by providing risk- and reward-sharing mechanisms.

- **Cooperative:** project success relies on strong relational requirements of partners, who have a high degree of decisional power. One partner can deliver the technical requirements, while information may be shared only on the subject at hand and often there may be separate goals, resources, and structures between partners. Cooperative partnerships require embedded inter-organisational relationships based on socially derived norms, such as trust, reciprocity, transparency, commitment, a high degree of information sharing, and openness. To achieve cooperation, informal mechanisms should be implemented to steer the relationship, including regular meetings, cohesion exercises or informal reunions.

- **Collaborative:** require the implementation of both relational (socially derived) and technical (control for delivering the works) mechanisms, to create highly integrated and embedded relationships between partners. Projects depend on maintaining durable relationships and investment in structures with a commitment to common goals. In a collaborative relationship, all partners need to contribute resources, rewards and leadership.

As the most complex form of partnership, the Tool and the Guidance that follows focus on “collaborative” partnerships; however, many aspects of the Guidance have relevance to aid in initiating and developing any of the four types of partnerships.
Step 2: Designing a framework for the partnership culture

The second step for creating effective partnerships is the project planning stage, where project managers need to make a tangible commitment to developing a partnership culture both within their teams and also across the partners. For relationships where the partner(s) were segmented in the “collaborative” relationship sector of the 4C Matrix in Step 1, we recommend defining and implementing a collaborative culture from the project’s onset. Each partnership will have unique collaborative practices and the Tool provides a systematic approach to designing your desired culture.

Sheet 2 Cultural Framework of the Collaborative Partnership Tool provides sets of factors with questions that will help you reflect upon the overarching collaborative culture you wish to implement (see figure below). Our research identified three Dimensions, and their supporting behavioural and technical factors and mechanisms, as drivers of collaboration. These occur in a wide range of sectors as forerunners of effective collaborative environments, processes and practices. The three Dimensions are Cultural, Relational and Operational, and they are explained in more detail in Step 3.

The sets of factors in Sheet 2 Cultural Framework are classified into the three Dimensions of collaborative drivers. Below we provide guidance on some of the key actions and considerations for each Dimension that can be used when completing this sheet. By considering the questions and information in this guidance, your organisation and partner(s) can discuss how each factor will be achieved and then jointly agree upon a set of actions that will be implemented to create the foundation of your project’s overarching culture. These can be recorded in sheet 2 Cultural Framework.

Image: rspb-images.com Andy Hay
<table>
<thead>
<tr>
<th>Dimension</th>
<th>Factors</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cultural</strong></td>
<td>Trust</td>
<td>How do we demonstrate our organisation’s trustworthiness? How do we demonstrate to our partners that we trust them? How do we demonstrate trust in each other’s expertise and competencies? How can we build relational-based trust? Commitment to the relationship: How will we create a culture of openness? How will we ensure that the project remains of strategic importance to all participants during its entire duration? How will we create a culture where reciprocity is rewarded? How will we integrate communities and other stakeholders in the collaborative environment? Aligning values, attitudes and behaviours: What values do we want to establish in the project? What behaviours do we want to encourage? How will we incentivise our people to exhibit these behaviours?</td>
</tr>
<tr>
<td><strong>Risk &amp; Reward Sharing</strong></td>
<td>Risk &amp; Reward Sharing</td>
<td>How should we allocate risk fairly in our supply chain for every stakeholder to succeed? How do we get the client to understand the risks of the project? How do we support our supply chain when risks emerge? How do we reward and incentivise our supply chain?</td>
</tr>
<tr>
<td><strong>Relational</strong></td>
<td>Relational</td>
<td>What and how will we communicate our needs and changes in our needs during the project? How do we trust one another to raise issues when they start to address these head on? How do we address issues for no one to lose and for everyone to gain value? How do we create effective problem solving mechanisms? How to create an environment where partners feel safe to raise issues?</td>
</tr>
<tr>
<td><strong>Operational</strong></td>
<td>Planning and controlling the works</td>
<td>How will we address the joint planning of activities? How will we address deviations from the initial planning? How will we ensure that the plan is implemented effectively? How will we provide flexibility to our teams for them to realise the plan?</td>
</tr>
<tr>
<td>Learning and Development</td>
<td>Learning and Development</td>
<td>How will we share our knowledge to pursue the plan? How will we develop our skills and competencies together? What joint activities for learning can we implement?</td>
</tr>
</tbody>
</table>

### 2.1 Cultural Dimension

#### 2.1.1 How will your organisation develop trust-based relationships with partners?

Trust is an important component of any working partnership. It influences how we speak and communicate with our staff and partners, how work is carried out, and how the results, outcomes and deliverables are achieved and accounted for. We define three types of trust that needed to be considered when building partnerships:

**Competence-based trust:** Do we trust the experience, expertise, resources of partners? This requires a degree of due diligence and an examination of the partner’s track record.

**Integrity-based trust:** This relies upon the behavioural and relational elements in a partnership. It considers the social factors (interactions of agents, e.g., managers, board members etc.), and their behaviours and attitudes (ability to listen, empathy, the way they communicate, willingness to work together, openness, etc.)

**Relational trust:** Relational trust refers to the interpersonal social exchanges that take place in a group setting. Therefore, the ways we listen, talk and act with team members are vital.

A number of behaviours are critical in building trust-based partnerships. Listening is important for showing interest in others’ aspirations, problems and issues. Gaining an understanding of what another person is saying shows empathy for others and brokers common ground. The ways we talk to others is important to ensure we communicate our messages with respect, are open and transparent about our intentions without a hidden agenda, clarify our expectations and boundaries with others, and are open to asking for and receiving feedback. Acting and behaving consistently is key to building trust. Taking responsibility for one’s actions, ensuring others are involved in a meaningful way and using people’s talents effectively also contribute towards building collaborative results.
Furthermore, understanding a team's strengths and weaknesses also enables a better assessment of the risks that might occur within the duration of the partnership. This enables the development of actions to delineate roles and responsibilities to team members with specific strengths and to support, nurture and develop individual team members (e.g., through training or coaching) to effectively achieve project goals. In turn, this ensures accountability, for example, by reviewing the relational and technical risks of a project. If a project is not progressing as expected, then accountability for actions needs to be reviewed and changes made.

2.1.2 How will you and your partners ensure commitment to the partnership?

Partnerships left to their own devices tend to be detrimental to the success of a project. Commitments that set tangible aims, objectives, actions, mechanisms and outcomes are critical to uphold agreed relationships and cultivate a collaborative working environment.

Relationships with partners can lead to the development of different forms of agreements, with the specific details of each agreement depending on the complexity, level of risk and financial obligations of the partnership. Such agreements may be formal (contractual), semi-formal (memorandum of understanding) or informal (governance practices such as boards or feedback meetings). It is important to consider whether negotiated Partnership Agreements with external partners are necessary (Box 3) or whether informal relationships are sufficient to achieve conservation project goals. If the actions are well designed, these can be translated into a set of key performance indicators which may be able to replace formal contracts.

Informal, non-binding relationship agreements are a great way to build trust gradually and reliably over time while getting to know organisations. These can include **Declarations of Mutual Interest** which are designed to advance relationships in a non-binding way by developing overarching shared goals and mutual interests, and sharing information while ensuring that each party maintains separate project goals, resources, and structures. Alternatively, a **Memorandum of Understanding** is useful as an agreement between organisations working to a common objective or purpose, with each party responsible for its own costs and delivery, but is not suitable in grant-funded projects and partnerships.
A binding **Partnership Agreement** specifies goals, roles, and responsibilities in more detail (Box 3). Under some circumstances, creating a binding Partnership Agreement will allow partners to build common rules and clarify expectations for project implementation, reducing potential misunderstanding and conflicts in the future. Binding agreements can be useful within partnerships working to deliver grant-funded projects when your organisation is acting as lead partner with the funding organisation. Legal considerations may also form an important basis for a partnership agreement (Box 5).

**Box 3: Partnership Agreements**

- Definition of project context: the purpose of the project and funding approval status, project commencement and expiry dates, name of the project, and project description.
- Definition of key objectives for joint work: clearly identify questions the partnership is addressing.
- Development of a work plan: for example, the project plan completed during the grant proposal state, possibly included as an attachment.
- Details of lead partner and other partner responsibilities: what each partner will do and manage, plus the specific project outcomes expected within the partnership.
- A governance plan (see further details in Box 4).
- Details of financial (and other) resources: the different financial and other resources partners bring to a project and mechanisms of transfer (e.g., capacity building opportunities). Usually, there are two specific mechanisms for the transfer of money: through contracts or grants.
- Details of payment schedule: including the project budget and individual delivery costs for each party, grant award provided by the funding body and any additional third-party funders, payment terms and timescales.
- Details of communication plan: how communications will be established both internally (for example, through email, telephone, regular meetings, the sharing of reports) and externally to the partnership. Other considerations include how partners will agree on coordinated messages, press releases, fundraising, public presentations and other documents designed for external audiences.
- Notice period: number of months’ written notice to be given by one party to the other in the event of termination for convenience of either organisation.

**Box 4: Project governance**

A Governance Plan should be included in the development of a Partnership Agreement so that all partners have a standard set of rules and structures describing how decisions will be made. A Governance Plan may include information such as:

- The core decision-making body, such as a Steering Committee and/or subject-specific advisory councils.
- A set of guidelines for reaching decisions, identifying the key people involved in making decisions, defining who gets final say and signs off on specific decisions, whether decision-making is consensus based or a democratic/autocratic process, whether leadership is shared, and if decision-making responsibility will move between different people over time.
- Details of lead partner and partner obligations and responsibilities.
2.1.3 How will you align values, attitudes and behaviours?

It is important to develop a vision for the types of values you wish to create through a project, to set a foundation for common ways of working and to identify the desired attitudes and traits to cultivate among team members and across your partnership. All partnerships and their teams need a specific set of skills to help plan, manage and support the project so it is important to hire, train and deploy competent staff with collaborative attitudes and skills (see Step 3). In large-scale conservation projects, staff often need scientific and project management skills, in order to manage processes and budgets, set goals and conduct activities, plus other people skills, to build trust, engage and problem solve. This means developing job descriptions and interview techniques to recruit people with specific traits and also supporting staff through training and mentoring opportunities to build skills in specific areas such as conflict management or negotiation.

Box 5: Legal considerations

You will want to consider and discuss several legal considerations which may form the basis for the Partnership Agreement with your new partners:

- Conflict of Interest: Conflict of interest policies and other non-negotiable values or principles need to be shared up front.
- Intellectual Property Rights: Ownership and credit for products from the partnership is a key issue that should be discussed early in negotiations. For example, many projects lead to the creation of published works, scientific papers, reports or other documents where names and logos appear. Issues such as how each contributor will be credited should be clarified.
- Confidentiality: Your agreement should clarify which information is public and which is confidential to the project team or specified individuals.
- Branding and Publicity: Agreements should give details of how each partner commits to communications and abides with specific requirements of funding terms and conditions, including acknowledgement of grant funding bodies. This also details information regarding the use of logos in relation to the project.
- Data Protection and Freedom of Information: A Data Processing Agreement needs to be set up to govern processing of personal data in compliance with data protection laws.
- Insurance Provisions: Agreements should include details of adherence to relevant insurance policies to fulfil partner obligations and liabilities.
- Termination Provisions: A plan is needed for exiting from the agreement as well as the circumstances and criteria to end or renegotiate a partnership.
- Liability and Indemnity Terms: Agreements regarding indemnities and the liability of each partner in relation to all actions, claims, demands, costs, damages, injury and expenses arising directly or indirectly from any act, omission or non-performance of that partner, as well as liabilities for death or personal injury caused by negligence, fraud or fraudulent misrepresentation.
- Anti-bribery, Anti-slavery, and Anti-money laundering Terms and Conditions: Ensure compliance with all applicable laws, statutes or regulations in force relating to the avoidance of bribery and corruption, money laundering, tax evasion, slavery and human trafficking.
- Governing Law and Dispute Resolution Procedures: A formal grievance process agreed upon by all partners to manage emerging disputes.
2.2 Relational Dimension

2.2.1 How will you allocate and share the risks and rewards of the project(s)?

A risk is defined as something that could potentially negatively impact a project’s success and partnership relationships. The joint work planning for the project should develop mechanisms to regularly monitor project progress in order to identify risks and mitigate any issues that might arise. Such risks must be anticipated, to enable sufficient time to manage them effectively. Mechanisms could include regular meetings or status reports to allow project managers and partners to monitor progress against the work plan, identify emerging risks and take corrective actions where necessary.

Conversely, celebrating successes and wins is also important for bolstering team and partnership morale. Successful teams and partnerships may be rewarded through various award systems or incentives, empowering collaborative champions and providing growth opportunities for team members.

2.2.2 How will you proactively manage conflicts?

Identifying potential conflicts early in the project planning process can lead to more effective conflict resolution later on down the line. In many circumstances conflicts can be resolved by the following considerations:

- Maintaining ongoing communication and access to project information.
- Establishing mechanisms to clearly delineate roles, responsibilities and accountabilities.
- Creating opportunities and forums for team members and partners to raise issues.
- Cultivating a working environment of mutual trust and respect.
- Encouraging active and respectful listening between partners and team members.
- Ensuring transparency in all decision-making processes.

More serious conflicts may require third party mediation, for more formal grievance procedures or when decisions cannot be reached.

2.3 Operational Dimension

2.3.1 How will you and your partner/s collectively plan for and control the work?

Once a partnership is established, the next step in the process is to implement joint work planning leading to the development of the project activities. A joint work plan can serve as a road map for team members and partners to build the links between their vision, goals, objectives and activities. Planning should include the following:

- Participation and engagement by all partners in the work planning process to build commitment and ownership of the project.
- Setting out SMART objectives: Specific, Measurable, Attainable, Results-Orientated and Time-Bound.
• Setting out milestones for monitoring success and achievements. These can be minor (an achievement that is key to reaching a major milestone) or major (an achievement that is key to delivering the work). Organising and celebrating minor and major wins is important to build teamship and camaraderie between partners.

• Setting out tasks (individual actions e.g., reviewing a funding proposal) and activities (a group of related tasks e.g., the process of developing a funding proposal) for achieving objectives.

• Reaching clarity on roles and responsibilities of partners. Openly discuss and come to agreement on what roles include; these should then be clearly communicated, understood and respected. Assigning roles ensures clear decision making and project control and builds cohesion between partners. It is important to ensure that the implementation of specific tasks/activities are assigned to specific partner(s), allowing greater opportunities for partners to work together.

• Creating opportunities and mechanisms within the project plan to identify, monitor and respond to new information or emerging risks and issues as they arise.

2.3.2 How will you jointly learn and share knowledge to improve and develop the collaboration and the delivery of the project?

Considering how to communicate and share knowledge and actions is important in fostering collaborative partnerships, particularly when implementing work plans, monitoring progress, problem solving, and addressing any risks and issues that emerge throughout the project lifecycle. Reflecting upon how communications will be established between partners is critical for collaborative working. For example, will communications be facilitated through email, telephone or regular meetings? Other considerations include deciding how partners will agree on coordinated messages, press releases, fundraising, public presentations and other documents designed for external audiences. It is also important to learn from experience to improve the planning, implementation and monitoring of current and future projects. Creating opportunities and mechanisms within the work plan for identifying, capturing, sharing and adapting to learning is key to developing joint learning among partners.
Step 3: Identifying core collaborative behaviours and competencies

Effective partnership development requires project managers to reflect on the different collaborative skills, experiences and assets of their team. Strong partnership teams include skills such as strategic planning, facilitation and problem solving as well as the values, attitudes and behaviours that help create relationships built on trust and mutual respect. **Step 3** aims to identify the desired behaviours for your project in your team.

If you wish to carry out a detailed assessment of the extent to which individuals in your team meet the Behaviours and Competencies required for an effective partnership, please refer to the associated **Individual Behavioural Assessment Tool and Guidance**, where **Step 3** here becomes **Step A**. This will help you to identify when to develop, nurture and reward individuals and teams in order to design and support effective partnerships.

As described in **Step 2**, the three key Dimensions driving successful collaborations are: Cultural, Relational and Operational. For individuals, within these three Dimensions, nine Categories of Behaviours and Competencies were defined (Understands the Vision; Information diffuser; Reconciles the vision; Is relationship oriented; Is trustworthy and trusting; Works well with others; Strategic thinking and leadership; Problem solver; Acts and interacts with and for partners). In **Step 3**, you will consider the significance of each of these Dimensions and Categories for your collaborative relationship.

Sheet 3 **Behavioural Framework** of the **Collaborative Partnership Tool** provides a list of relevant Behaviours and Competencies, classified into the Dimensions and Categories named above. This sheet can be used as a checklist when considering the relative importance of each Behaviour and Competency for the partnership you are establishing and assessing whether these behaviours are present within your team.

Specific projects may require additional elements that are particular to their context. We therefore encourage organisations to frame **Step 3** of the Tool around their specific needs and to involve all team leaders in decisions of the relevant and additional elements to be included. We recommend limiting each Dimension to a maximum of 15 Behaviours and Competencies and updating these periodically during the partnership/project lifecycle.
To achieve this, **Step 3** identifies the relevant Categories and Behaviours and Competencies from sheet **3 Behavioural Framework**, plus any additional suggestions from the team, by considering the following questions:

1. What are the relevant Categories of Behaviours and Competencies that **drive the collaborative culture** defined in **Step 2**?
2. What are the relevant Categories of Behaviours and Competencies that **create meaningful relationship/s** with the partner(s)?
3. What are the relevant Categories of Behaviours and Competencies that **mean the project operates** on time, in full and on budget?

Once you have identified the relevant Behaviours and Competencies required to build and sustain the partnership, this checklist can be used to aid consideration of the relative importance of each of these Behaviours and Competencies (for example by scoring each on a scale from 0-10, where 0 = not at all important and 10 = critically important for the collaboration). This can then be used as the basis of an assessment of whether these requirements are met by your team and its members, for example during recruitment or appraisal processes, or whether further training or additional expertise is needed. For help with this please see the **Individual Behavioural Assessment Tool and Guidance**.

*Image: rspb-images.com Andy Hay*
Step 4: Managing transitions

The roles that partners and team members play in a project will inevitably change and evolve over time, or may come to an end. Reasons for adapting or concluding a partnership may include:

- Reaching the expiration date of the partnership agreement
- Completion of the project and delivering the project objectives
- Not fulfilling the original purpose of the partnership
- A problematic relationship
- Changes in priorities
- New partners and expertise required
- Project funding is terminated.

Since transitions of organisations and individuals in a project constitute a significant risk, we recommend partners devise effective exit strategies at the project onset, to maintain the embeddedness of the collaboration and preserve the relationships that have been built. There are two types of transitions in projects:

- **Scheduled transition:** The organisation and/or the key individual(s) exit the partnership based on a transparent and known agenda.

- **Unforeseen transition:** The organisation and/or the key individual(s) exit the partnership abruptly leaving little to no time for controlling the exit transition.

**4.1 Reviewing and analysing your partnership**

Managing change, for example, through reviewing and updating work plans and partnership agreements, is important to ensure dynamism in partnership relationships. During transition or periodic review, it is important that partners together reflect on the following:

- Have your partners or team members changed?
- Do you need to build new capacity within the project to manage these changes?
- What are the impacts of these changes?
- Have you adapted your work plan/partnership agreement to reflect changes?
- Do you need to redefine the relationship with partners or consider a plan for exiting?
4.2 Applying learning to new projects

Understanding what worked and what did not is crucial for individuals and for the wider success of landscape-scale conservation. Highlighting successful and unsuccessful practices, and communicating them effectively to others, is a key part of any project. While it may be uncomfortable, and appropriate ethical considerations should be taken regarding sensitive activities or incidents, sharing the lessons learned from mistakes and failures can be crucial to ensure others do not repeat the same errors or waste additional resources trying something that has already been found not to work.

Successes, problems, failures, trials and solutions can be effectively communicated by, for example, workshops, talks, seminars or conferences with relevant networks. It is good practice to share learning by ensuring reports are open and available to others and are stored in an accessible format. It is important to be proactive in sending information to others you think may be interested, both within known networks and across the wider conservation community, for example by using social media to highlight information and resources available.

Careful planning, execution and communication of partnerships aims to facilitate the increased success of large-scale, collaborative conservation and restoration projects. This Guidance for Identifying and Developing Collaborative Partnerships and the Collaborative Partnership Tool, and the linked Guidance for Assessing an Individual’s Collaborative Behaviours and Competencies, with the Individual Behavioural Assessment Tool will hopefully help to achieve this. Good luck with your conservation partnership!’
Steps 1, 2, 3 and 4 are covered in this Collaborative Partnership Tool

Steps A, B and C are covered in the Individual Behavioural Assessment Tool

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**Step 1**

- Is a partnership necessary?
- Calculate Relational scores for each partner on sheet **1.1 Relational Score**.
- Calculate Technical scores for each partner on sheet **1.2 Technical Score**.
- Use sheet **4C Matrix** to identify what type of relationship is desirable (Transactional, Coordinative, Cooperative, Collaborative).

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**Step 2**

- Use sheet **2 Cultural Framework** Sheet to plan how to Align Behaviours, Coordinate Activities and Work Together.

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**Step 3/Step A**

- There are three Dimensions (Culture, Relationships, Operational), each composed of several Categories of Behaviours/Competencies, that promote success in collaboration in large-scale conservation projects.
- Use sheet **3 Behavioural Framework** to identify the Categories and associated Behaviours/Competencies that are important in your project:
  - What Categories and Behaviours/Competencies drive the Culture?
  - What Categories and Behaviours/Competencies create meaningful Relationships?
  - What Categories and Behaviours/Competencies meet Operational attributes?

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**Step 4**

- Review and manage the partnership your team are working in.
- End partnership if necessary.
- Communicate results, successes, trials and failures widely.

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**Step B**

- In sheet **3.1 Behavioural Assessment** allocate weights to the Behaviours/Competencies. This is based on the importance of behaviours, Categories and Dimensions for your project.
- In sheet **3.2 Behavioural Framework** allocate a “Desired score” for the team/sub-group being considered.
- In sheet **3.2 Behavioural Framework** work with team members to score them for each Behaviour/Competency.

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**Step C**

- Use the tables in sheets **3.3 BA Total Score, 3.3.1 BA Culture, 3.3.2 BA Relationship** and **3.3.3 BA Operational** to identify where to develop, nurture, reward and celebrate individuals and teams.

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*These are an optional, additional set of steps that enable a detailed assessment of the extent to which individuals in a team meet the behaviours and competencies required for an effective partnership.*
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